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venture fund

Boston Charter School Replication Fund

2011 – 2015



BOSTON

- Charter schools opened before 2011
- Charter schools opened 2011 or later

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NewSchools Venture Fund is a national nonprofit that seeks to transform public education so that all children have the opportunity to succeed – especially those in schools that do not currently work for them. To achieve this goal, NewSchools identifies the most promising and innovative education entrepreneurs and helps them effectively accomplish their missions to achieve outstanding results for the children and educators they serve. Through our investing, management assistance, network building, and thought leadership, NewSchools helps to reinvent K-12 education to help students graduate high school prepared and inspired to achieve their most ambitious dreams and plans.

Executive Summary

In 2010, the Commonwealth of Massachusetts passed legislation to increase the charter cap in the state's lowest-performing districts, unleashing a flurry of activity across Boston's charter sector. As charter schools organized their growth plans, in 2011 NewSchools Venture Fund launched a new fund to support the growth of high-quality charter schools serving low-income students in Boston. This report looks back on the successes, challenges, and lessons learned over the four years of the Boston Charter School Replication Fund (the Boston Fund).

#1

**URBAN CHARTER
SECTOR**

6,567

**NEW CHARTER
SCHOOL SEATS
CREATED**

2x

**GROWTH OF THE
CHARTER SECTOR**

KEY RESULTS

The Boston Fund helped double the size of the most successful charter sector in the country while maintaining consistent quality by investing \$12 million to build school ventures and to build the education ecosystem.

Building School Ventures

In its four years, the Boston Fund:

- Invested to establish seven growing, high-performing charter management organizations, helping these organizations scale with quality
- Supported over 6,500 new charter school seats in the greater Boston area, helping the city's charter sector grow from about 5,000 seats in 2010 to a projected 11,000 seats in 2020
- Helped expand a charter sector that performs at the highest level of any of the 41 regions included in Stanford's CREDO study on urban charter schools¹
- Supported a focus on student outcomes in its board roles and other capacity-building efforts, helping keep MCAS results, high school graduation rates, and 4-year college attendance rates at consistently high levels throughout growth

Building the Education Ecosystem

The Boston Fund also:

- Invested to establish a permanent teacher pipeline for Boston charter schools that contributed a quarter of the teaching talent needed to support these schools' growth
- Helped cultivate ongoing collaboration between charter schools and Boston Public Schools, enabling mutual benefit by increasing equity in enrollment and through facilities sharing
- Supported research to build a fact base about the short- and long-term student outcomes from Boston charter schools
- Invested in the Massachusetts launch of organizing group Families for Excellent Schools to help parents advocate for quality school options ◆

Introduction

CHARTER SCHOOLS IN BOSTON

Boston has long been home to a number of single-site charter schools with strong track records of success² while serving populations of predominantly low-income students. However, a statewide cap on charter school enrollment long prevented these schools from growing to serve more students. The passage of the Massachusetts Achievement Gap Act of 2010 changed this, doubling the number of seats allowed in Boston. Charter schools seeking to expand in Boston could now do so, and several Boston charter operators quickly moved to grow.


NEWSCHOOLS VENTURE FUND

Simultaneous to policy developments in Massachusetts, NewSchools Venture Fund (NewSchools) was extending its track record of successful investments in scaling entrepreneurial education ventures. NewSchools established its early reputation as a partner to education entrepreneurs by supporting organizations like Aspire Public Schools, Achievement First, KIPP, Noble, and Uncommon Schools as they created and grew early-stage charter school networks. In the years immediately prior to the passage of Massachusetts' Achievement Gap Act, NewSchools was increasingly engaged in city-based approaches to building high-performing education ecosystems, including support for New Schools for New Orleans and the launch of NewSchools' own DC Schools Fund, a Washington, DC-based effort focused on supporting new and existing excellent schools in a city in which low-income students have historically been underserved.

THE BOSTON CHARTER SCHOOL REPLICATION FUND

NewSchools' history along with its long-standing staff presence in Boston and the conditions in Boston in 2011 combined to make it an ideal moment for NewSchools to launch its second city-based fund, the Boston Charter School Replication Fund. The objective of the \$12 million Boston Charter School Replication Fund (the Boston Fund) was to lay the groundwork for a system of public schools in Boston in which all children have a quality school option, by:

- 01** Supporting the creation of at least 5,500 new, high-quality charter school seats, and
- 02** Developing an education ecosystem that advances city-wide school quality.



If the Boston Fund succeeded in accomplishing these objectives, successful proof points of charter management organizations delivering results at scale would have the potential to accelerate local reform, paving the way for additional growth in the number of students served. Excellence in urban education would then have the potential to catalyze change in Massachusetts and beyond.

While pursuing these objectives, the Boston Fund would also help to answer a number of open questions about school quality, charter school ecosystems, and issue advocacy. Could the strong performance of these charter schools be replicated? Would school operators continue to produce strong results while reaching larger numbers of high-need students? Can excellence in charter schools drive district and state policy change that benefits low-income students?

REPORT ROADMAP

This report details the activities and outcomes of the Boston Charter School Replication Fund from its inception in July 2011 to its sunset in June 2015. It begins by presenting the high-level strategy for the Boston Fund. It then provides a detailed description of the results achieved by each of the Boston Fund's three strategic levers: support for new, high-quality charter school seats; investments in pipelines for key resources like human capital and facilities; and support for research and advocacy efforts to advance the interests of Boston's high-performing charter school operators. Finally, the report provides an overview of lessons learned as a result of the fund. ◆

Fund Strategy

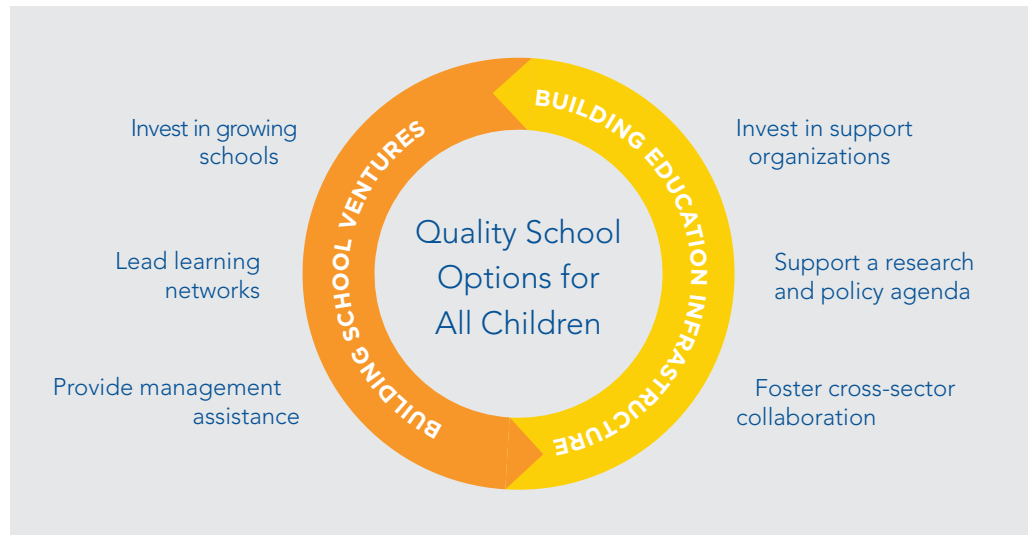
CITY FUNDS STRATEGY

The Boston Charter School Replication Fund was one of four City Funds initiated by NewSchools beginning in 2008 (other City Funds included Washington, DC, Newark, and Oakland). City Funds aggregated national and local philanthropy behind a unified set of goals and an investment strategy focused on increasing school quality in each city.

City Funds focused on building high-quality school ventures and building the overall education ecosystem.

- **Building School Ventures:** NewSchools helped schools maximize impact through direct investment in the growth of successful existing schools and promising new schools, and through capacity-building to help schools grow with quality.
- **Building the Education Ecosystem:** In order to best position the schools it supports for success and to advance city-wide school quality goals, NewSchools also invested in support organizations, helped encourage policy that reduces barriers to quality, and supported community demand for quality schools.

Through its investment and capacity-building activities, NewSchools built deep relationships with and understanding of the organizations it supported. Its focus on the broader ecosystem helped NewSchools develop a big-picture perspective



and productive relationships with a range of stakeholders, including policymakers, thought leaders, and funders. This combination enabled NewSchools to help establish a vision for local education reform through its City Funds.

BOSTON FUND STRATEGY

Each City Fund tailored its activities to the specific needs of the ventures in the ecosystem in which it operated. In Boston, a critical mass of high-performing, single-site charter school operators were poised for rapid growth when the Boston Fund launched. The Boston Fund therefore focused its investments on three strategic levers:

- 01** New, high-quality seats: Investments to support charter schools seeking to replicate effective models, or to pioneer new models focused on innovative instructional approaches or new grade levels.
- 02** Pipelines for key resources: Investments to support human capital ventures that recruit and train great teachers or leaders, and facilities ventures that provide turnkey real estate services.
- 03** Research and advocacy: Investments to support advocacy ventures and research efforts that address policy obstacles to charter school growth with quality.

The following sections detail how these levers were applied and the results that were achieved over the four years of the Boston Fund. ◆

New, High-Quality Seats

\$8M INVESTMENT

Objectives

- Support charter schools seeking to replicate effective models, including support for at least 5,500 new, high-quality charter school seats in the greater Boston area
- Support efforts to pioneer new school models focused on innovative instructional approaches or new grade levels

Key Results

- Supported the creation of 6,567 new charter school seats in the greater Boston area
- Boston charter schools consistently outperform local district and state averages in both MCAS proficiency and the percentage of graduates planning to enroll in four-year colleges
- Supported the launch of Boston's first blended learning charter school

OBJECTIVE

Support charter schools seeking to replicate effective models

Historically, charter schools in Boston have achieved unusually high levels of student success. The primary focus of the Boston Fund was to build on this success by providing growth capital to single-site charter schools seeking to replicate their models. As of the start of the fund, the state Board of Elementary and Secondary Education (BESE) had already approved 4,500 new seats for high-performing charter operators seeking to scale in Boston. In subsequent years, BESE approved additional seats within these and other operators.

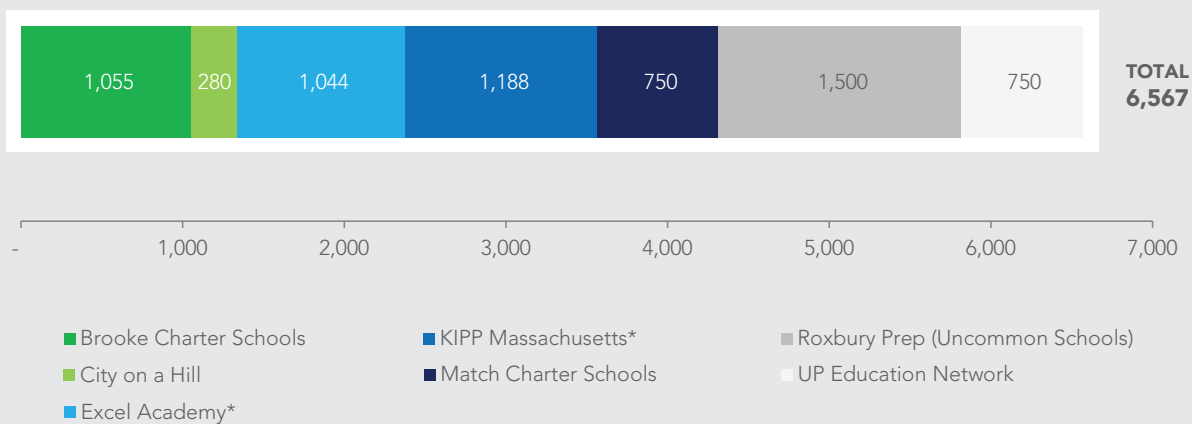
ACTIVITIES

The Boston Fund invested in 6,567 new seats across seven newcharter management organizations established by successful single-site schools in order to open new schools:

- Brooke Charter Schools: Investment supported the launch of two new K-8 schools serving 1,055 students, helping Brooke grow to be a three-school network serving about 1,500 students.
- City on a Hill: Investment supported the launch of a new high school serving 280 students, helping City on a Hill grow to be a network of three high schools that will serve over 800 students.
- Excel Academy: Investment supported the launch of two new middles schools and one new high school serving a total of 1,044 students, helping Excel grow to be a four-school network that will serve about 1,300 students in grades 5-12 in Boston and Chelsea.

- KIPP Massachusetts: Investment supported the launch of a new middle school and two new elementary schools that will grow to serve a combined 1,188 students. With this growth, KIPP MA will become a network of five schools serving about 2,000 students in grades K-12 in Boston and Lynn.
- Match Charter Schools: Investment supported the launch of two new schools, as well as the expansion of existing schools, for a total expansion of 750 new seats across Match’s four-school, 1,250-student network.
- Roxbury Prep (Uncommon Schools Boston): Investment supported the launch of two new middle schools and one new high school serving a combined 1,500 students, helping Roxbury Prep grow to be a four-school network of 1,800 students in grades 5-12.
- UP Education Network: Investment supported the launch of UP Academy Holland, a turnaround of Holland Elementary School that will serve 750 students in grades K-8, helping UP grow to its current size of five schools serving 2,500 students in Boston and Lawrence.

NEW SEATS BY CHARTER MANAGEMENT ORGANIZATION



* Includes new seats in Chelsea (operated by Excel) and Lynn (operated by KIPP Massachusetts)

With each investment in a scaling charter operator, the Boston Fund took on a board support role. In most cases, this meant a NewSchools team member joined the board as a full voting member. In some cases, NewSchools team members joined as observers or as board committee members. Through these board roles, the Boston Fund was able to provide strategic guidance and thought-partnership to the leaders of portfolio organizations. Erica Brown, Executive Director of City on a Hill Public Charter Schools, commented that “Our NewSchools board committee member has added a wealth of knowledge from across the sector to our strategic planning process. We are so much stronger as a school in its next stages of expansion as a result of this engagement.”

RESULTS

The Boston Fund helped grow the highest-performing charter sector in the country to scale.

By 2020, with support from the Boston Fund, Boston will have about twice as many charter schools serving twice as many students as it did before the fund, and one out of four middle school students in Boston will attend charter schools. Over the course of this growth, enrollment of high-need students has increased at a faster rate than overall enrollment growth. With rapid enrollment growth and increasing numbers of high-need students, Boston charter schools have maintained their strong performance, achieving at or above pre-Boston Fund levels as measured by the MCAS and by high school graduation rates, with college enrollment rates near pre-Boston Fund levels.

	2009-10	2014-15	2019-20*
Number of charter schools	14	25	27
Charter school enrollment	5,086	8,475	10,944
% of Boston students enrolled in charter schools	8.4%	13.5%	17.4%
% African American or Hispanic	84%	85%	--
% Low income	69%	72%	--
% Special education	13%	14%	--
% English language learners	2%	10%	--
% Proficient or Above, Reading**	71%	73%	--
% Proficient or Above, Math**	66%	66%	--
% Advanced, Reading**	12%	16%	--
% Advanced, Math**	25%	31%	--
HS Graduation Rate (4-year adjusted cohort)**	75%	76%	--
Graduates Planning to Attend College (2- or 4-year)**	98%	94%	--

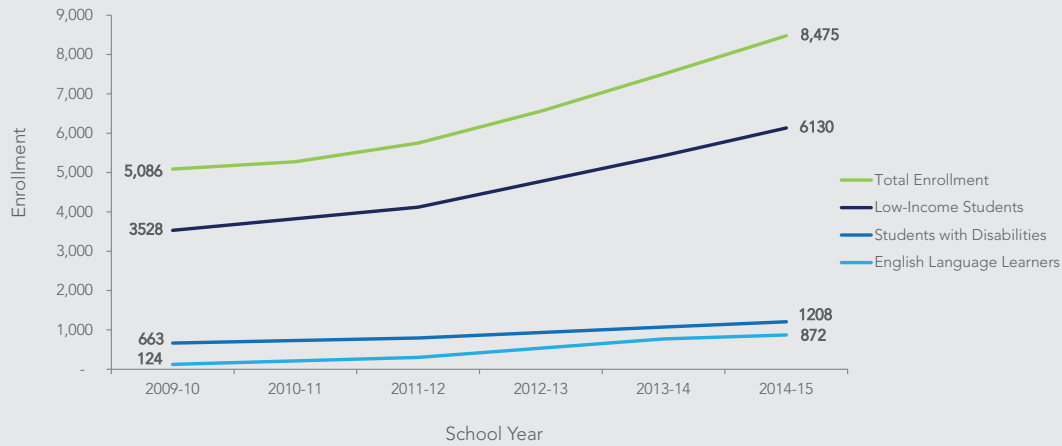
* 2019-20 data is projected based on charter school growth plans

** Data from 2014 reports (most recent data available at time of publication)⁴

The Boston charter sector serves significantly more high-need students now than it did prior to the Boston Fund.

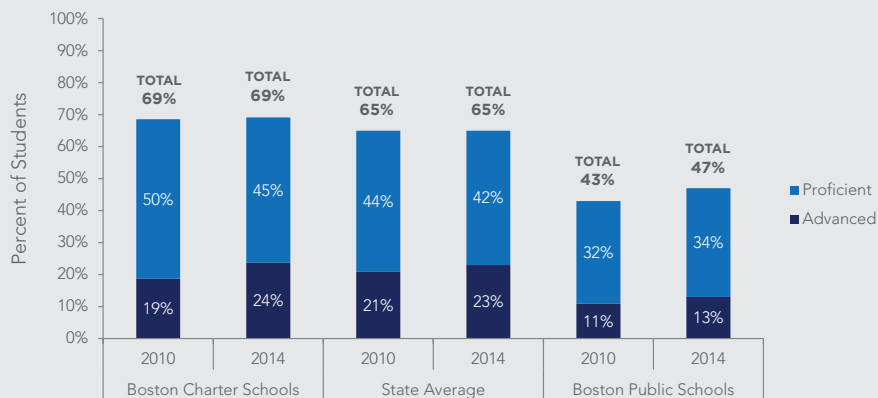
This includes low-income students, special education students, and English language learners. Although this shift is primarily due to the overall growth of the sector, improved approaches to student recruitment have also played an important role. As a result, enrollment growth among these student populations is actually growing at a faster rate than overall enrollment. For example, while the sector as a whole has nearly doubled over the past five years, the number of ELL students enrolled in charter schools today is seven times what it was in 2009-10. As Boston's charter sector continues its growth over the coming years, the number of high-need students who are able to find seats in high-performing charter schools will also continue to grow.

BOSTON CHARTER SCHOOL ENROLLMENT GROWTH

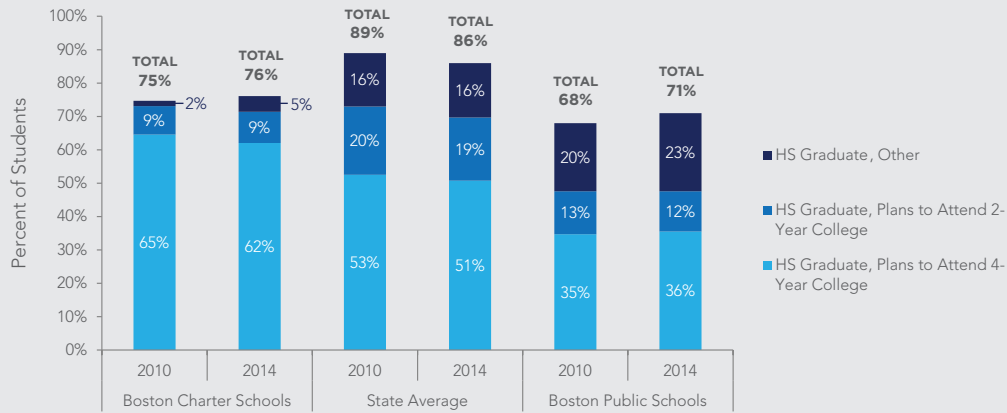


Boston charter schools have maintained consistently strong student outcomes with growth. Throughout growth, Boston charter schools have outperformed local district and state averages in almost all categories. This includes student outcomes on state assessments, high school graduation rates, and rates of 4-year college attendance. The only area in which charter schools lag state averages is high school graduation.⁵

MCAS RESULTS, 2010 AND 2014 (COMBINED READING AND MATH)

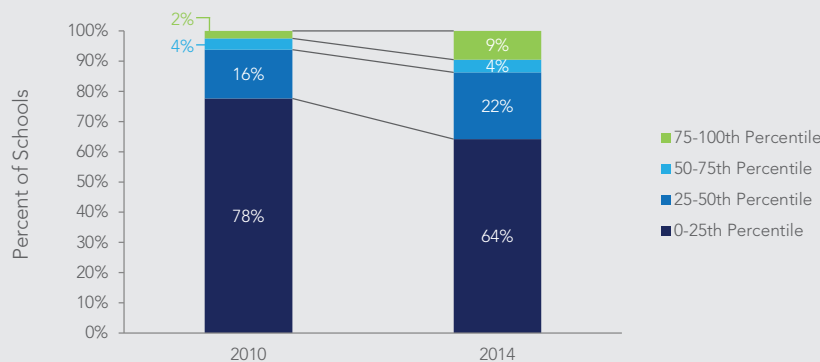


HIGH SCHOOL GRADUATION RATES, 2010 AND 2014



The Boston Fund has shifted the distribution of school quality in Boston to benefit low-income students. Before the Boston Fund, just two percent of the public schools in Boston serving primarily low-income students⁶ were in the highest statewide performance quartile on the 2010 MCAS. By 2014, over four times as many schools were in this top quartile. The majority of schools in this category are charter schools that opened with support from the Boston Fund.

BOSTON'S LOW-INCOME PUBLIC SCHOOLS* BY STATE MCAS PERFORMANCE QUARTILE



* Low-income public schools: District or charter schools with student enrollment of 60% or more low-income students



Jenaya Amore, City on a Hill **CLASS OF 2015**

The Boston Fund has helped increase the availability of high-quality schools for students like Jenaya Amore, who graduated from City on a Hill Public Charter School in June 2015. Jenaya was raised in a single-parent household in Boston's Dorchester neighborhood. Jenaya and her mother decided that she should enter the enrollment lottery for City on a Hill because of its reputation for rigorous academics. She took challenging coursework throughout her four years at City on a Hill, including AP courses in Environmental Science and Government and Politics. She now has a full ride to Connecticut College, where she intends to major in Environmental Studies beginning in the fall. "I feel like, overall, I learned a lot about life. It's not just about the academics; you learn about yourself at this school. City on a Hill played a big part in helping me build my character. They really care about their students and want them to succeed." – **Jenaya Amore, City on a Hill Graduating Class of 2015**

(ABOVE) Jenaya Amore was selected by her peers to be Master of Arms for the 2015 City on a Hill graduation ceremony

OBJECTIVE

Support efforts to pioneer new school models

Several charter operators in the Boston Fund portfolio planned to launch new schools that used innovative instructional approaches or served new grade levels. Because of the additional level of risk and challenge involved with designing new school models relative to replicating proven models, the Boston Fund supported intensive school planning efforts for these new school models to help ensure quality

ACTIVITIES

The Boston Fund provided school planning grants to five members of the portfolio to develop plans for new school models:

- Excel Academy, Roxbury Prep (Uncommon Schools Boston), and Brooke Charter Schools received funding to develop plans for new high school models. In NewSchools' investing experience nationally, high school has posed unique challenges to charter schools that have traditionally served elementary or middle school grades. Excel Academy and Brooke Charter Schools were each developing plans for their first high schools, while Roxbury Prep was building on existing high school design elements from the Uncommon Schools network, incorporating more technology and adapting these plans to the unique Boston context. The Boston Fund supported these investments with a complementary community of practice series focused on high school planning (see "Boston Community of Practice" section).
- Match Charter Schools received funding to develop plans for Match Next, a blended learning middle school that leverages technology and a high-dosage tutoring model to accelerate student learning. This school serves students coming from Match Community Day elementary school, another innovative Match school (see "Profile: Match Community Day").
- KIPP Massachusetts received funding to develop plans for its first elementary school, KIPP Academy Boston Elementary. The school launched successfully and served as a model for KIPP Massachusetts' second elementary school, which will open in Lynn in 2015.

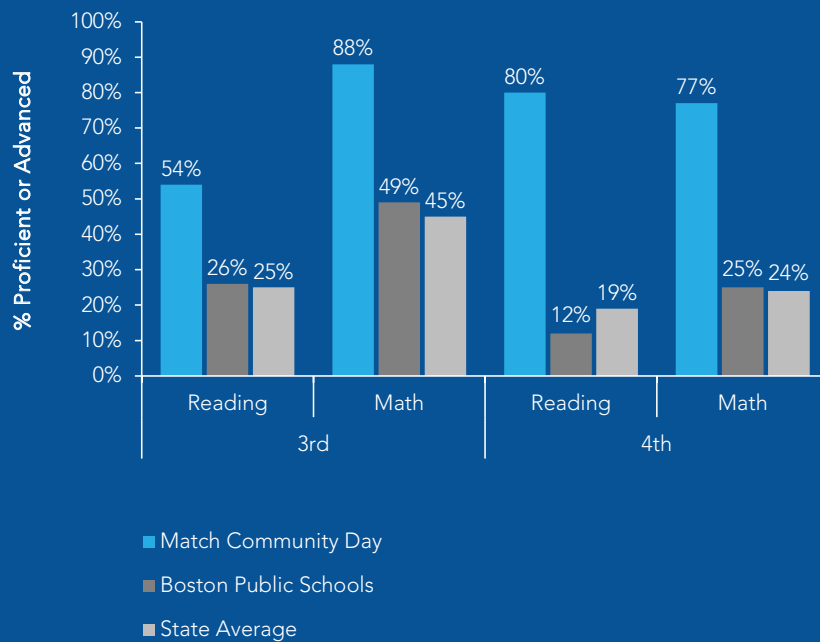
RESULTS

Match Next and KIPP Academy Boston Elementary each successfully launched in fall 2014. Although early indicators for both schools are promising, the first state student outcomes data will not be available until fall 2015. Excel Academy and Roxbury Prep are both on track to open their new high schools in fall 2015. Brooke Charter Schools has a clear set of plans for its future high school, but will be unable to fulfill these plans until it receives approval from the state to open this school, pending the availability of more seats under the cap. ◆

Match Community Day

In 2011, Match Charter Schools partnered with Lawrence-based Community Day Charter Schools to establish a new elementary school with a special focus on serving Boston families who do not speak English as a first language. The new school, Match Community Day, now serves 306 elementary school students, over 80% of whom are English language learners (ELLs). The school's ELL students outperform their peers in the district and state by a significant margin. By combining Match's strong ties to the Boston community and tutoring-based instructional model with Community Day's expertise in operating elementary schools that serve large populations of ELLs, Match Community Day has established itself as a model for what is possible in ELL education in Boston.

MCAS RESULTS FOR ENGLISH LANGUAGE LEARNERS (2014)



<http://www.matcheschool.org/about/mcas-results/>

Pipelines for Key Resources

\$1.1M INVESTMENT

Objectives

- Support human capital ventures that can recruit, train and place new teachers and/or principals, who meet effectiveness standards established by Boston's highest-performing charter operators
- Support facilities ventures that can provide turnkey real estate development services

Key Results

- Supported recruitment and training for 119 teachers who were placed in the greater Boston area
- Helped facilitate access to BPS space for three high-quality, growing charter schools serving high-need neighborhoods

OBJECTIVE

Support human capital ventures

Access to sufficient talent, including both teachers and school leaders, is a key input to successful charter school expansion. Common strategies to meet this human capital need include recruiting new teachers, retaining current teachers who have a track-record of success, and growing talent, especially school leadership talent, through internal staff development. At the beginning of the Boston Fund, analysis conducted by NewSchools suggested that Boston's charter sector was likely to need more than 400 new, high-quality teachers, as well as over 20 new school leaders, to support growth over the course of the four-year fund.

ACTIVITIES

To help Boston charter schools ensure an adequate supply of talent, the Boston Fund undertook the following activities:

- Invested in Match Teacher Residency: The Boston Fund invested in Match Teacher Residency (MTR) as a growing pipeline of new teachers specifically trained to work in charter schools like those in Boston. In addition to recruiting and training new teachers, MTR helps connect many of its teacher trainees to Boston-area charter schools through partnerships with these schools.
- Engaged TNTP: The Boston Fund initially engaged TNTP to share with Boston charter leaders its findings about effective teacher retention practices. Later, responding to demand from charter leaders, the Boston Fund invested in TNTP to conduct its Instructional Culture Insight survey, a teacher survey that enables schools to assess their

effectiveness relative to a core set of practices that drive teacher retention, in Boston charter schools.

- Coordinated a community of practice: Many successful charter management organizations have developed talent management strategies that enable them to retain more of their top instructional talent, while simultaneously developing these individuals as leaders who are capable of stepping into school leadership roles later in their careers. To ensure that Boston charter schools had the opportunity to learn about this set of practices, the Boston Fund coordinated a series of community of practice sessions focused on talent management. Jon Clark, Co-Director of Brooke Charter Schools, commented that “Our revised and much-improved teacher compensation plan... came directly out of our work in several NewSchools community of practice sessions.” For more information, see “Boston Community of Practice” section.

RESULTS

Investment from the Boston Fund supported recruitment and training for 119 new teachers who went on to teach in the greater Boston area. These teachers, each of whom completed Match Teacher Residency, filled about a quarter of the total growth-related need estimated before the fund. The investment in MTR also helped launch the Sposato Graduate School of Education (SGSE), a first-of-its-kind alternative graduate school of education that grants the degree of Master’s of Effective Teaching. SGSE will be a permanent pipeline of new, high-quality teachers for the greater Boston area.

Support for TNTP helped 23 Boston-area charter schools benefit from the TNTP Insight survey. Since the Boston Fund first supported this work in fall 2013, TNTP has conducted its Insight survey on a twice-yearly basis, working directly with charter leaders to interpret results and use them to drive talent management strategy. TNTP also incorporated the results of this survey into a report, *Greenhouse Schools in Boston*, helping shine a light on practices that drive success in Boston.⁷

OBJECTIVE

Support facilities ventures

Scaling charter operators typically face significant challenges identifying suitable facilities in which they can open new schools. In the absence of existing facilities, the alternative is to develop new buildings, a highly technical and capital-intensive operation for which charter management organizations usually lack in-house expertise. At the beginning of the Boston Fund, analysis suggested that Boston’s charter sector was likely to need at least 12 new school buildings to support growth.

Laule'a Gorden-Kuehn, Sposato Graduate School of Education

CLASS OF 2012

Match Teacher Residency (MTR) has helped attract teachers like Laule'a Gorden-Kuehn to work in Boston. After teaching English as a Fulbright Fellow in Bangladesh, Laule'a was excited for the opportunity to have a positive impact closer to home. She joined MTR in 2011, training as a teacher while also serving as a tutor at Match Middle School. During her time with the program, Match launched the Sposato Graduate School of Education (SGSE). Laule'a was in the first cohort to graduate from SGSE with a Master's in Effective Teaching.

MTR helped connect Laule'a with UP Academy Boston, part of UP Education Network, where she began as a seventh-grade math teacher in 2012. Teachers like Laule'a have helped UP Academy Boston achieve one of the highest student growth rates in math in the state after UP turned the school around in 2011. Now three years into her work as a teacher, Laule'a is once again working with MTR as a part-time peer coach to its current group of teacher residents. One of the key principles that Match Teacher Residency has helped instill in Laule'a is the importance of a growth mindset. "The MTR model has you constantly reflect on your practice, debrief with your advisor, and collaborate to solve problems. I also teach my students to have a growth mindset, to take risks, make mistakes and articulate how they fixed their errors. It has been amazing to watch what students can accomplish when they believe in themselves."

ACTIVITIES

The Boston Fund focused on two activities to help provide the sector with the buildings it needed:

- Explored viability of a turn-key real estate provider: Historically, NewSchools has had success investing in organizations like Pacific Charter School Development and Civic Builders, which have partnered with charter management organizations in California and New York to help them develop buildings. The Boston Fund team sought out opportunities to support an entrepreneurial venture that could fill this niche in Boston. However, given the regulatory complexity of the local real estate market and the limitations on future charter school growth, no compelling investments emerged.
- Facilitated access to underutilized district buildings: The largest supply of suitable facilities for charter school growth in Boston is the set of existing public school buildings. With demographic and enrollment shifts over time, several of these buildings were underutilized as of the launch of the Boston Fund.

Boston Compact

The Boston Compact brings together educators from district, charter and Catholic schools across Boston in order to improve education for all children in the city. With sponsorship from the Bill and Melinda Gates Foundation, the Boston Compact began in 2011, at the same time the Boston Fund was getting underway. Boston Fund team members contributed to the Boston Compact process throughout the life of the fund, helping advance initiatives to increase equity in access to high-performing schools and to provide excellent instruction to all students in Boston.

RESULTS

The Boston Fund helped enable access to three underutilized district facilities through collaboration facilitated by the Boston Compact. These buildings, which are now occupied by charter schools through lease agreements with Boston Public Schools, helped fill roughly a quarter of the total need for buildings to support growth. Furthermore, the collaboration that led to these lease agreements helped establish a process that may serve as a model for future leases of excess district school buildings to charter schools. ◆

Boston Community of Practice

Throughout its history, NewSchools has helped catalyze innovation in education by convening communities of practice in which education entrepreneurs share effective practices and receive thought-partnership from peers facing similar challenges. In Boston, the critical mass of single-site charter schools taking their first steps as scaling charter management organizations provided ideal conditions for a local community of practice. The primary objective of the Boston community of practice was to support local charter school leaders with their most critical strategic challenges by sharing benchmarks and best practices from the Boston portfolio, and by learning from best-in-class national leaders.

ACTIVITIES

The Boston Fund convened the local community of practice a total of 20 times over the course of its four years. Session topics were selected based on the expressed needs of the charter networks in the portfolio.

Primary Topic	Number of Sessions
High School Planning	6
Talent Management	4
Academic Rigor	4
Financial Planning	2
Other (Supporting high-need students, Organizational culture, School visits)	4

RESULTS

The key measures of success from the Boston community of practice were the satisfaction of portfolio entrepreneurs and the extent to which sessions supported these leaders' strategy development:

- Owen Stearns, CEO of Excel Academy Charter Schools, commented that "Being able to learn from some of the top high school providers across the country, and in a setting where they could really be honest about what worked – and more importantly, what hadn't – was exactly what we were looking for during our design phase. And the

connections we made through that year continue to be helpful as we approach our actual high school launch (in fall 2015).”

- Following each session, participants completed a detailed feedback survey. On average, participants rated the quality and value of these sessions as 4.1 out of 5, where 5 is “Extremely valuable/Excellent quality”.

SAMPLE AGENDA FROM A CONVENING FOCUSED ON HIGH SCHOOL PLANNING (11/19/13)

Time	Topic	Speaker(s)	Goal(s)
12:00 – 12:15PM	Introduction	Boston Fund team	- Introduce agenda and goals - Introduce speakers and other guests
12:15 – 1:05	Panel Session: “To What End?”	- Kyle Cole, Chief Academic Officer, Noble Network - James Troupis, Chief Talent Officer, Noble Network - Jeff Sudmyer, Regional Superintendent, Achievement First - Mike Mann, High School Principal, North Star Academy	- Compare and contrast definitions of academic college readiness - Evaluate key academic successes and challenges of high-performing charter high schools
1:05 – 1:50	Interim Assessments	Kyle Cole and James Troupis	Share effective practices developed by peer high school operators
1:50 – 2:35	Rigorous Writing	Jeff Sudmyer	
2:35 – 3:20	Lesson Types	Mike Mann	
3:20 – 4:00	Mix and Mingle	N/A	Facilitate relationship-building among speakers, guests, and participants

Research and Advocacy

\$1.2M INVESTMENT

Objectives

- Support research efforts and advocacy ventures that address policy obstacles to charter school growth with quality

Key Results

- Supported gold-standard research from MIT demonstrating that students who attend Boston's charter schools, and particularly those from the most traditionally underserved groups, significantly outperform their peers
- Helped bring parent organizing group Families for Excellent Schools to Massachusetts

OBJECTIVE

Support research efforts

Prior to the 2010 Achievement Gap Act, research from Harvard and MIT helped pave the way for a charter cap increase by using a rigorous methodology to demonstrate that charter schools in Boston were achieving strong student outcomes.⁸ However, a number of questions remained about whether these results would lead to longer-term student success; whether they could be sustained over time, particularly as charter schools sought to grow to scale; and whether students with diverse needs benefitted equally from attending charter schools. The Boston Fund supported research efforts designed to address these questions

ACTIVITIES

In partnership with The Boston Foundation, the Boston Fund invested in two research projects that were led by researchers at the MIT School Effectiveness and Inequality Initiative:

- *Charter Schools and the Road to College Readiness*, published in May 2013, examined a set of long-term student outcomes to understand how attending charter schools impacted students in high school and beyond.⁹ Long-term outcomes evaluated in the report included SAT and AP test scores, high school graduation rates, and college-going rates.
- *Charter School Demand and Effectiveness*, published in October 2013, revisited the 2009 study by evaluating Boston charter student success on state MCAS assessments relative to a comparable set of peers who were not selected in the random charter lottery.¹⁰ It also evaluated how the effects of attending charter schools vary across demographic groups.

RESULTS

Findings from the two MIT studies confirm, using a rigorous analytical methodology, that Boston’s charter schools outperform traditional public schools in most areas. Since the 2009 report, charter schools have continued to achieve stronger results on the MCAS assessment. This has remained true through the initial stages of charter expansion following the cap lift. Although they are effective for all students, this research demonstrates that charter schools are especially effective for students with high levels of need, including low-income students, students with disabilities, and English language learners. In the long-term, charter schools help their students score about 100 points higher on the SAT than their peers. Charter students are more likely to pass the AP test with a score of three or higher, and they are more likely to attend a four-year college. The only area in which findings from the studies are inconclusive is high school graduation, where graduation rates for charter students are statistically similar to graduation rates for non-charter students.

OBJECTIVE

Support advocacy ventures

Despite the abundance and quality of evidence showing positive student outcomes from Boston’s charter sector, in 2014, the state legislature declined to pass a bill that would have incrementally increased the charter cap. This decision deprived the families of 25,700 students who are on charter school waitlists in Boston¹¹ from short-term hope that their students might be able to attend the school of their choosing.

ACTIVITIES

To help empower these and other families to advocate for the schools they want, the Boston Fund invested to support the launch of Families for Excellent Schools (FES) in Massachusetts. FES has a strong track-record of promoting access to excellent schools in low-income communities through community organizing and advocacy efforts.

RESULTS

Families for Excellent Schools organized one of the largest education rallies the city of Boston has ever seen. In fall 2014, FES partnered with Boston charter operators, parents, and families to orchestrate a rally that brought over 2,000 people to Faneuil Hall in support of excellent schools in Massachusetts. Along with the rally, FES published a report, *77,000 Reasons to Believe*¹², titled after the number of students in the state who attend failing schools. FES’s organizing work in Boston is ongoing, with a particular focus on parents who don’t have the option of a high-quality school for their students. ◆

Investment Summary, 2011-2015



Charter School Organizations

BROOKE CHARTER SCHOOLS

Kimberly Steadman, *Co-Director*

Jon Clark, *Co-Director*

\$1,415,150 Investment

OBJECTIVES

- 01** Support the launch of two new K-8 charter schools including a total of 1,055 new seats
- 02** Develop plans for a future high school

KEY ACCOMPLISHMENTS

Among 5th-grade students at Brooke's flagship Roslindale campus, 86% scored at the "advanced" level on the 2014 MCAS math assessment and 65% scored "advanced" in ELA, higher than any other school or district in Massachusetts

Won the 2015 Pozen Prize in recognition of academic excellence and quality learning environments in Greater Boston charter schools



CITY ON A HILL PUBLIC CHARTER SCHOOLS

Erica Brown, Executive Director

\$350,000 Investment

OBJECTIVES

Support the launch of one new charter high school serving 280 students in grades 9-12

KEY ACCOMPLISHMENTS

Had the 4th-highest student growth percentile (81) in the state of Massachusetts on the 2014 MCAS math assessment



EXCEL ACADEMY CHARTER SCHOOLS

Owen Stearns, CEO

\$1,405,000 Investment

OBJECTIVES

- 01** Develop plans for a new high school
- 02** Support the launch of two new charter middle schools and one new charter high school serving a total of 1,044 students

KEY ACCOMPLISHMENTS

Flagship campus ranked #1 in the state on 8th grade MCAS Math assessment with 100% of students scoring proficient or higher

Flagship campus ranked #4 in the state on 8th grade MCAS English assessment with 93% of students scoring proficient or higher



KIPP MASSACHUSETTS

Caleb Dolan, Executive Director
\$1,161,122 Investment

OBJECTIVES

- 01 Develop plans for a new elementary school
- 02 Support the launch of one new charter middle school and two new charter elementary schools serving a total of 1,188 students

KEY ACCOMPLISHMENTS

Of first high school graduating class, 95% are projected to attend 4-year college in fall 2015

Part of a national network of charter schools that are [increasing 4-year college completion rates](#) for low-income students by 5x



MATCH CHARTER SCHOOLS

Stig Leschly, CEO, Match Education
\$1,187,500 Investment

OBJECTIVES

- 01 Develop plans for new, blended learning middle school
- 02 Support the launch of one new charter elementary and a charter middle/high school serving 750 students

KEY ACCOMPLISHMENTS

High school students scored an average of 1549 on the SAT, nearly 400 points higher than the BPS non-exam school average

Launched Boston's first blended learning, human capital hybrid model school, Match Next, in 2014



ROXBURY PREP (UNCOMMON SCHOOLS BOSTON)

Dana Lehman, Managing Director
Will Austin, COO
\$1,975,000 Investment

OBJECTIVES

- 01 Develop plans for a new high school
- 02 Support the launch of two new charter middle schools and one new charter high school serving a total of 1,500 students

KEY ACCOMPLISHMENTS

Over the past five years, average performance on the math MCAS exam has been in the top 5% of all schools in Massachusetts



UP EDUCATION NETWORK

Scott Given, CEO
\$500,000 Investment

OBJECTIVES

- Support the launch of one new K-8 turnaround school serving 750 students

KEY ACCOMPLISHMENTS

UP Academy Dorchester, the second school in UP Education Network operating in Boston, had the highest math student growth percentile of any school in the state (94) in its first year of school turnaround

MATCH TEACHER RESIDENCY

Stig Leschly, CEO, Match Education
\$1,000,000 Investment

OBJECTIVES

Support the growth of Match Teacher Residency to serve as a pipeline of teachers to Boston area charter schools

KEY ACCOMPLISHMENTS

Launched Massachusetts' first accredited alternative graduate school of education, the Sposato Graduate School of Education, which confers the degree of Master's in Effective Teaching

TNTP

Ariela Rozman, CEO
\$70,000 Investment

OBJECTIVES

- 01** Administer the Instructional Culture Insight survey to Boston charter schools
- 02** Produce a report on Greenhouse Schools in Boston

KEY ACCOMPLISHMENTS

Published [*Greenhouse Schools in Boston: School Leadership Practices Across a High-Performing Charter Sector*](#)



FAMILIES FOR EXCELLENT SCHOOLS

Jeremiah Kittredge, CEO
\$500,000 Investment

OBJECTIVES

Support the launch of a new Families for Excellent Schools region in Massachusetts

KEY ACCOMPLISHMENTS

Organized a rally at Faneuil Hall in which over 2,000 parents and family members advocated for excellent schools in Massachusetts

**MASSACHUSETTS INSTITUTE OF
TECHNOLOGY**

Report Authors: Joshua D. Angrist, Sarah R. Cohodes, Susan M. Dynarski, Parag A. Pathak, Elizabeth M. Setren, Christopher D. Walters
\$185,445 Investment

OBJECTIVES

- 01** Complete and publish a preliminary report on the long-term outcomes of Boston charter school students relative to their peers
- 02** Complete and publish a report comparing the MCAS performance of Boston charter school students to their peers

KEY ACCOMPLISHMENTS

Published [*Charter Schools and the Road to College Readiness: The Effects of College Preparation and Attendance and Choice and Charter School Demand and Effectiveness: A Boston Update*](#)

Lessons Learned

Several lessons from the four years of the Boston Fund can inform ongoing efforts to improve public education for low-income students, in Boston and in other urban school systems nationally:

01 GROWING WHAT WORKS IS AN EFFECTIVE STRATEGY TO INCREASE THE NUMBER OF HIGH-QUALITY SEATS.

In 2011, Boston had a critical mass of single-site charter schools that were achieving strong student outcomes. The Boston Fund helped enable these schools to serve more students by investing in growth with quality. Philanthropic capital and capacity-building activities helped enable Boston charter schools to replicate their results. With rapid growth, charter student outcomes – including MCAS scores, graduation rates, and college-going rates – have remained consistently higher than those of other local public schools. Much of this success can be attributed to the fact that these schools’ replication efforts were launched from significant points of strength, in which the flagship schools had established models and excellent results.

02 CHARTER SCHOOLS CAN BE A GREAT OPTION FOR HIGH-NEED STUDENT POPULATIONS.

Rigorous research from MIT demonstrates that Boston charter schools are effective for all students, and especially effective for students with the highest levels of need – including special education students and English language learners. As the enrollment of high-need students has increased in Boston’s charter sector in both absolute and relative terms, student outcomes have remained strong for all students. Innovative school models like Match Community Day are setting a new standard for ELL student success. As recruitment and enrollment practices continue to improve, it will be increasingly possible for students with the highest levels of need to access an excellent education in Boston.

03 COLLABORATION ACROSS SCHOOLS AND SECTORS CAN HELP LEVEL THE PLAYING FIELD.

Cross-school collaboration has helped schools strengthen planning and systems, preparing them for successful growth. Meanwhile, cross-sector collaboration has addressed common needs, including alleviating a significant barrier to charter school growth in Boston by enabling charter schools to access excess district facilities. Collaboration has also enabled charter schools to reach a broader group of students in their recruitment efforts. In the long-term, collaborative efforts have the potential to advance quality practices and reduce barriers, allowing more students access to quality schools.

04 ADVOCACY FROM THE LOCAL COMMUNITY IS NEEDED TO DRIVE POLICY CHANGE THAT BENEFITS LOW-INCOME STUDENTS.

With hindsight, it is possible to say that the Boston Fund under-invested in advocacy in its early years. The initial fund prospectus allocated just \$500k to research and advocacy, much of which was targeted toward research on student outcomes from the charter sector. Although this research has informed the debate on charter schools, the depth and quality of this evidence was insufficient to convince the state legislature when it considered a charter cap increase in 2014. The Boston Fund later increased its investment in this area to \$1.2 million, helping bring Families for Excellent Schools to Massachusetts to organize parents and families around better schools for their students. The Boston Fund's experience highlights the importance of a strong base of community support for excellent schools, and underlines that many conditions must be aligned in an ecosystem – beyond stellar schools – to achieve systemic impact.

05 CHARTER SCHOOL GROWTH WITH QUALITY IS POSSIBLE WITH THE RIGHT SET OF CONDITIONS IN PLACE. The four years of the Boston Fund saw a significant and rapid increase in the quality school options available to students in Boston: before the fund, just two percent of the schools in Boston serving majority low-income student populations were in the top quartile of statewide performance; today, this number has more than quadrupled to 9%. The conditions that enabled this change, that have been profiled throughout this report, are 1) a critical mass of high-quality school operators; 2) pipelines for key resources, especially talent and buildings; 3) cross-school and -sector collaboration, to facilitate best-practice sharing and to address common needs; 4) a policy environment that supports quality schools; and 5) community engagement to ensure public demand for a supportive policy environment.

06 PHILANTHROPIC INTERMEDIARIES CAN HELP ESTABLISH THE CONDITIONS FOR CHARTER SCHOOL GROWTH WITH QUALITY.

No urban public school ecosystem currently has all five conditions in place for rapid charter school growth with quality. Few have as many of the right conditions as those that were present at the launch of the Boston Fund. A philanthropic intermediary can help bring about these conditions by mobilizing resources behind a shared strategy, identifying and filling gaps in the ecosystem, enabling mutual learning and improvement, aligning collective action, and managing conflict between competing interests within a coalition. ◆

Conclusion

The Boston Charter School Replication Fund took important steps toward ensuring that all children in Boston have the opportunity to attend a quality school. By helping establish high-performing school ventures and by developing a supportive ecosystem, the Boston Fund was able to double the size of the highest-performing charter sector in the country. These results represent real change for Boston's students. However, far too many of these students – and especially those who have been traditionally most underserved by their public schools – still lack a quality school option. Although the Boston Fund helped develop the conditions that could lead to long-term system transformation for all of Boston's students, ongoing change will not be possible until a policy environment that consistently supports quality schools can be established. Going forward, we believe that growing community support for quality schools and the increasing momentum among leaders at the state and local level to support quality and collaboration lends great promise to future opportunities for more charter school growth, and more students with access to high-quality schools.



Endnotes

¹ <https://urbancharters.stanford.edu/download/Urban%20Charter%20School%20Study%20Report%20on%2041%20Regions.pdf>

² <http://economics.mit.edu/files/6493>

³ See: <http://urbancharters.stanford.edu/download/Urban%20Charter%20School%20Study%20Report%20on%2041%20Regions.pdf>

⁴ See: http://profiles.doe.mass.edu/state_report/

⁵ Using the 4-year adjusted cohort high school graduation rate. See: http://profiles.doe.mass.edu/state_report/

⁶ District or charter schools with student enrollment of 60% or more low-income students

⁷ <http://tntp.org/publications/view/greenhouse-schools-in-boston>

⁸ http://www.tbf.org/~media/TBFOrg/Files/Reports/InformingTheDebate_Final.pdf

⁹ <http://www.tbf.org/~media/TBFOrg/Files/Reports/Charters%20and%20College%20Readiness%202013.pdf>

¹⁰ <http://www.tbf.org/~media/TBFOrg/Files/Reports/Charter%20School%20Demand%20and%20EffectivenessOctober2013.pdf>

¹¹ <http://www.publiccharters.org/press/report-shows-10-major-cities-fail-meet-parental-demand-charter-schools/>

¹² <http://www.familiesforexcellentschools.org/campaign/massachusetts>