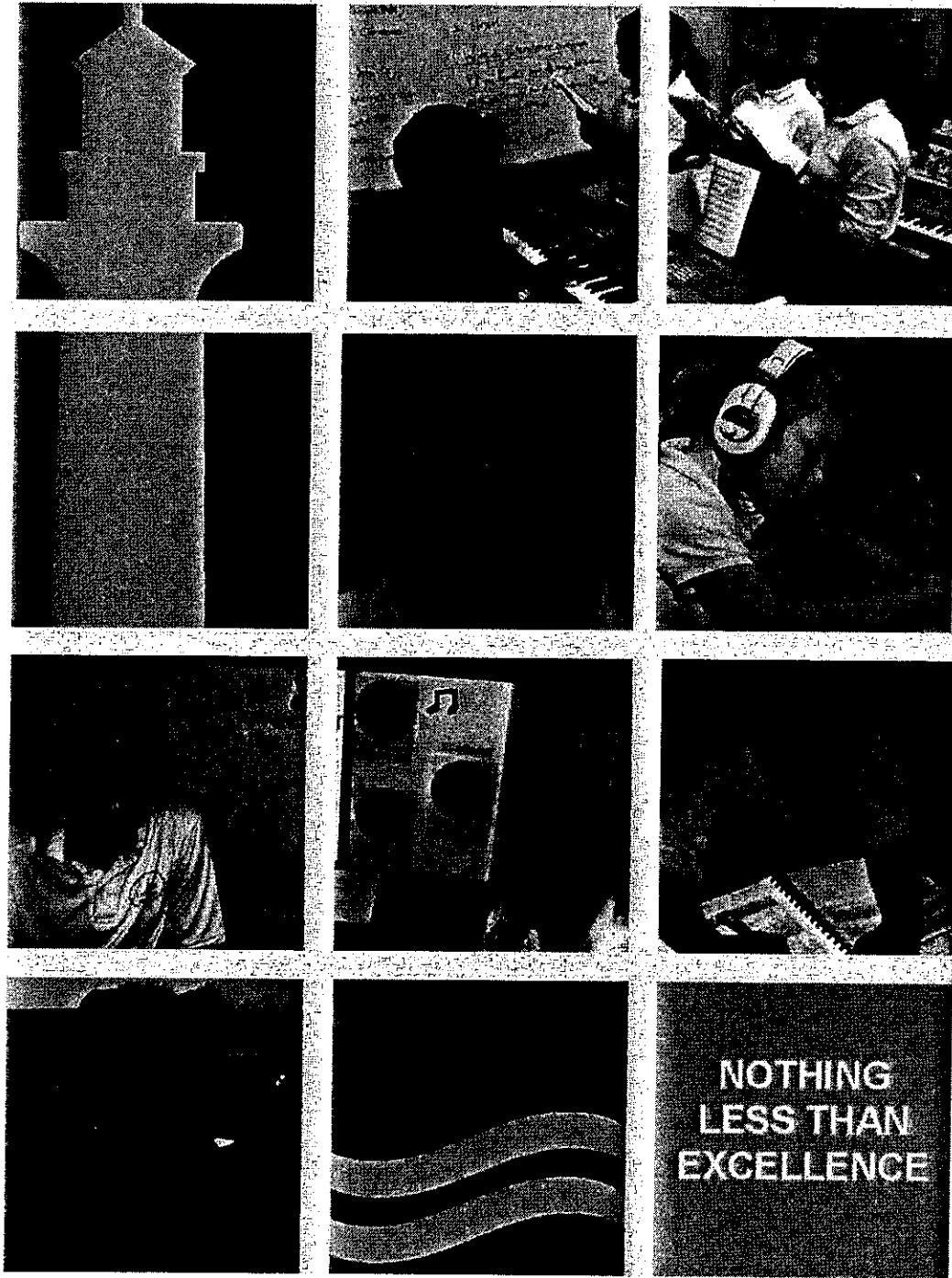


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Lighthouse Academies®

Business Plan

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Overview of Lighthouse Academies

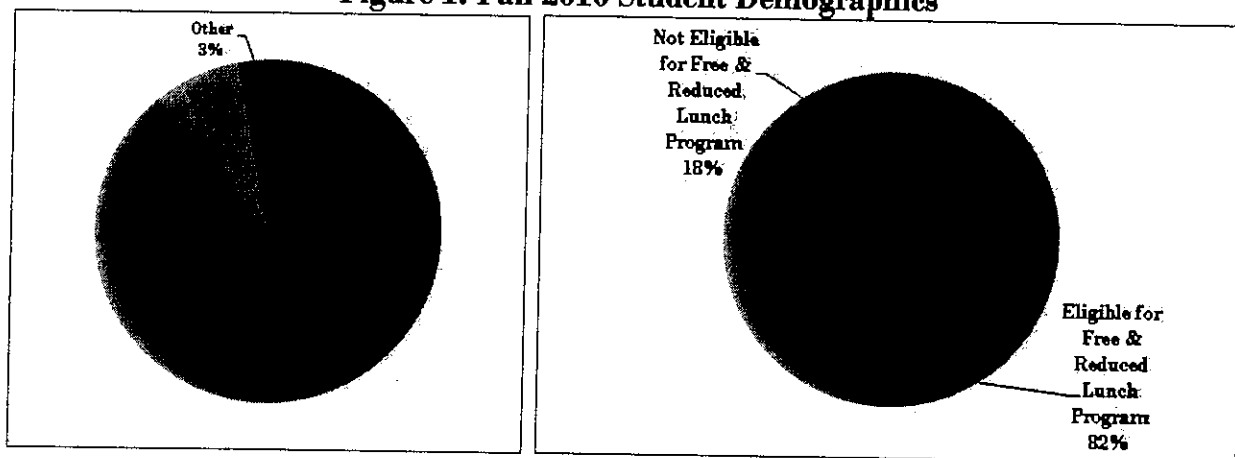
Who are we?

We are a national nonprofit network of charter schools. We are a growing community of approximately 4,600 students and families, and approximately 500 teachers, principals and staff members. We are here to ensure that all of our students graduate from college. We are here to make a difference in the lives of the students we teach. We are here to create opportunities that would not otherwise be there if we had not chosen to serve these children and their families. LHA team members are expected to do whatever it takes to make the opportunity for success in college happen for all of our scholars.

LHA set out to distinguish itself by forming a family of schools that use an arts-infused, K-12 college prep program to generate fantastic results fueled by hard work and requiring only the funding provided by law.

We serve a predominantly low-income, minority population in 14 public charter schools across the country. As you can see in Figure 1 below, 88% of our students are African American or Hispanic/Latino, and 82% of our students participate in the free/reduced lunch program.

Figure 1. Fall 2010 Student Demographics



Why does Lighthouse Academies exist?

We exist because there is a staggering achievement gap in America today that results in lifetime income inequalities that significantly affect the quality of life for a disproportionate number of people of color. Only by breaking the cycle of poverty will we truly transform children's lives.

Consider the following facts:

- Currently 90% young adults graduate from high school, and about 60% of high school seniors go on to college the following year.¹

¹ The Big Payoff: Educational Attainment and Synthetic Estimates of Work-Life Earnings.

- However, of the 13 million children growing up in poverty, only about 50% will graduate from high school.² Those who do graduate from high school will perform, on average, at the 8th grade level.³ Only about 10% of these students who enter college will graduate from college.⁴
- Fourth graders growing up in low-income communities are already three grade levels behind their peers in high-income communities.⁵ African American, Latino/Hispanic and Native American children are *three* times more likely to grow up in a low-income area.⁶

Table 1 shows the impact of education on lifetime income by race.⁷

Table I. Annual Income 2007

Race	High School Dropout	High School Graduate	College Graduate (BA)
White	22,289	33,223	58,652
Black	17,439	27,179	46,502
Hispanic	21,303	27,604	44,696

Based on these facts, if we do not do something today, half of our students will not graduate from high school. These students will earn less than half of the annual income they could earn as a college graduate. This not only affects their lives, but it will also affect the lives of their children. In a market-based economy, a person's income determines many of their choices in life, and economic freedom is about being able to make choices. At LHA, we believe we can transform the future for our scholars by preparing *all* – not some – of our students to graduate from college.

How do we plan to overcome the Achievement Gap?

We will overcome the achievement gap by providing a rigorous and engaging arts-infused program, organizationally and financially viable schools, highly effective teachers, relentless school leaders, and a pervasive culture of achievement and respect amongst students and staff.

Our Mission

We prepare our students for college through a rigorous arts-infused program.

Our Vision

All students will be taught by highly effective teachers in a nurturing environment and will achieve at high levels⁸. Each student will develop the knowledge, skills and values necessary

² <http://www.teachforamerica.org>. Retrieved March 30, 2009.

³ National Association for Education Progress (NAEP) (2005). Retrieved March 30, 2009

⁴ <http://www.teachforamerica.org>, Retrieved March 30, 2009

⁵ <http://www.teachforamerica.org>, Retrieved March 30 2009

⁶ National Center for Children in Poverty (2006), Retrieved March 30, 2009.

⁷ U.S. Census Bureau Table 227 Mean Earnings by Highest Degree Earned: 2007. Note that there are significant differences in income by sex as well.

for responsible citizenship and life-long learning. The impact of our collective efforts will fundamentally change public education.

Our Theory of Change

We will demonstrate that a nonprofit charter management organization (CMO), with a small amount of startup capital, can become a self-sustaining operator of high quality schools in a multi state environment. The organization will serve as a model for increasing the number of CMO's that can reach sustainability quickly with a small amount of capital, thus increasing the capacity to start more high quality charter schools throughout the country. More high quality schools will prepare more children for college and improve public education.

Our Theory of Action

If we develop high-quality charter schools that have long-term financial viability, we will demonstrate that nonprofit charter management organizations can have a positive, lasting impact on public education. Our theory of action includes the development of high quality schools through the implementation of a standards-based, arts-infused program, the development of financially viable schools, and a fostering a culture of social responsibility and continuous learning.

Our Brand

The Lighthouse is a symbol of hope and security. Our mission gives hope to parents for a brighter future for their children. Lighthouse Academies is building a brand around the belief that an arts-infused education program that is designed to increase student engagement, along with a strong social curriculum and culture, will result in academic achievement and lifelong learning.

Each school in the network is required to implement the model and operational design including the curriculum, the Lighthouse name, web site, logo and e-mail address. These designations remain the property of Lighthouse Academies, Inc. Local schools are free to select their arts partner and align the LHA curriculum to meet state standards. Local schools may also incorporate additional cultural resources and methods of instruction to meet the needs of their students.

Our Core Values

Our programs, systems and procedures reflect these core values:

- Work hard. Get smart. Graduate from college.
- High expectations equal results.
- Nothing less than excellence.
- Today is the day we make it happen.

⁸ Highly effective teachers are those whose students make academic gains at a rate of 50% more a year than the average. These teachers receive additional compensation based on student outcomes.

Our Core Beliefs

We share the following fundamental beliefs about our work:

- All children deserve access to excellent public schools.
- All children can achieve at high levels.
- The infusion of the arts into the core curriculum increases student engagement and helps develop a deeper understanding of core concepts, ultimately leading to increased student achievement.
- More family participation is better. Families have a lot to offer us.
- Every dollar we spend on overhead is a dollar unavailable to our schools.

Our Core Competencies

We are a team of social entrepreneurs dedicated to using our talents to transform children's lives.

- We offer a Pre K -12 college prep program
- We operate our schools solely of the per pupil money that follows the child. The range is \$5,770 to \$13,500 per student.
- We operate in a multi state environment working with seven different authorizers in five states and the District of Columbia.
- We open multiple schools in several locations simultaneously
- We develop school facilities for our schools.

Network Goals and Evaluation

As an organization, we have established rigorous goals that are used to measure our success (see Appendix A). As part of the evaluation process, each school currently participates in a site visit evaluation by *Cambridge Education*, experts in school evaluation methods. These site visits, which occur annually, provide extensive feedback on areas of strength and areas of growth at each site. In addition, members from the LHA education team conduct periodic site visits at each school throughout the year to monitor progress and conduct planning sessions with the school leadership team.

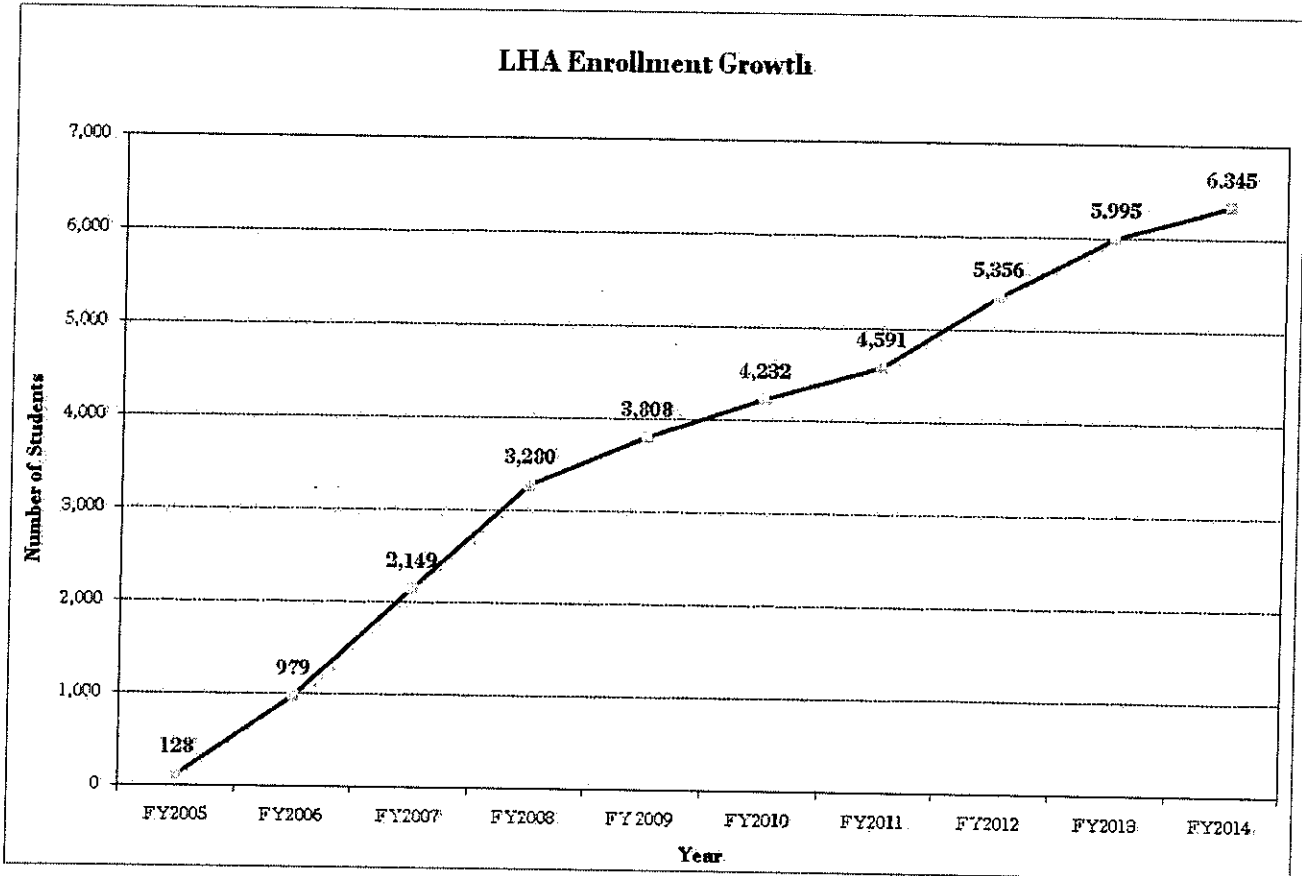
Our History

Our current President and CEO, Michael Ronan founded Lighthouse Academies in November 2003 after working as an Entrepreneur in Residence at the Pisces Foundation. Our first school, Bronx Lighthouse Charter School, opened its doors in September 2004 to 128 students. In the first five years, LHA has developed, opened and is operating public charter schools in four states and the District of Columbia. Since our inception, Lighthouse Academies has been supported by generous grants from the Doris and Donald Fisher Fund, New Schools Venture Fund (NSVF) and the Walton Family Foundation. Lighthouse Academies is a member of the NSVF Community of Practice, sharing our experiences with other education entrepreneurs who share our passion and mission.

The Lighthouse network includes 14 schools and close to 4,600 students. In 2009-2010, LHA was the second largest CMO in the United States based on the number of states we operate in and the number of schools we operate. Our schools expand one grade level per year until

they reach twelfth grade. Figure 2 shows the enrollment growth starting with our first year and projecting out through 2014 based upon current charters. Table 5 shows additional potential growth.

Figure 2. LHA Enrollment Growth 2005-2014



How Are We Doing?

Across the network as a whole, student achievement growth is steadily increasing as measured by state and interim assessments. We are beginning to close the achievement gap as evidenced by the average growth of more than one grade level in reading and math across the network in 2009-2010. Family involvement, which is central to the student's success in school, is strong. However, we recognize the need to increase the percentage of students who are rated proficient on state assessments if we are to achieve our mission.

The Lighthouse Academies Market

Market Drivers

Two significant initiatives dominate the school reform movement. One is to increase accountability for student achievement by developing state standards and linking these standards to state assessments that every student needs to pass to receive a high school diploma. The second was to develop free public school choices for parents to create a viable

alternative to the local public schools. The passage of Public Law 107-1110, referred to as the No Child Left Behind Act of 2001 (NCLB), gave new impetus to high stakes assessment and public school choice.

NCLB requires all states to administer annual assessments aligned with state standards and to use the results as a primary measure of school and district success. The law also requires that states have in place a statewide accountability system that applies to all public schools, including charter schools. The system seeks to insure that all students reach a proficient level in reading and mathematics by 2014.

These state assessments began in the 2005-2006 school year for reading/language arts and mathematics for every grade in every year from third to eighth grade. During one year in the tenth to twelfth grade span, students are tested in reading and mathematics. Science and social studies assessments began in 2006-2007. Assessment results must be disaggregated by ethnicity, disability, low/non low income, and limited English proficiency. School districts and schools that fail to make adequate yearly progress (AYP) in any category of students toward statewide proficiency goals are subject over time to a mandated school improvement process, corrective action and restructuring measures, which includes providing parents with the option of transferring their child to a charter school.

Charter Schools

Charter schools are independent tuition-free public schools. Educators, parents, community leaders and educational entrepreneurs develop and operate charter schools. Forty states and the District of Columbia have enacted charter school statutes and have Charter schools in operation. State, local and independent authorizers may award a charter. Local or state educational organizations monitor the performance of charter schools. Charter schools operate free from some of the bureaucratic and regulatory processes that typically exist in traditional public schools. The charter term is anywhere from three to fifteen years in length, depending upon the state. Charter schools are subject to some form of annual review by the authorizer and to a rigorous review process for renewal. Charter schools must comply with the same assessment requirements as district public schools. As of Fall 2009, there were more than 5,000 public charter schools serving more than 1.5 million students⁹, representing about 2.4% of the K-12 population and 5% of all public schools.

The principal benefits of the charter school model are:

- **Innovation:** Charter school operators have the freedom to design and implement innovative curriculum and programs.
- **Competition:** Charter schools must compete with traditional public schools as well as private schools to attract students, which forces them to focus on customers' needs.
- **Accountability:** Charter schools are accountable to each parent, who decides whether to enroll his or her child, and to the authorizer who granted the charter. Both the

⁹ Center for Education Reform, *National Charter Schools Data*, <http://www.edreform.com/index.cfm?fuseAction=document&documentID=1964>, Retrieved September 15, 2010.

parent and the authorizer expect the school to deliver a high quality education program.

- Choice: Charter schools give parents a choice when it comes to their child's education, regardless of the family's financial means.

Market Size

School enrollment in grades K-12 reached 62.8 million children in Fall 2009¹⁰. Of these children, 89 percent (56.1 million) attend public schools, and 11 percent (6.7 million) attend private schools.¹¹ Overall, total public enrollment is projected to set new records every year through 2018.¹² In the short term, through 2011, a decrease in secondary public school enrollment is projected while elementary public school enrollment continues to increase.

School Financing

Financial support for public schools varies widely. As of FY 08, median expenditures per pupil for public elementary and secondary education were \$9,509.¹³ Expenditures vary greatly from state to state. In FY08, the median per pupil for district public schools was \$14,594 in Washington D.C. compared to \$8,729 in Illinois and \$8,119 in Arkansas.¹⁴ Expenditure variations may be partly attributable to variations in costs of living across different locations. Total current expenditures include instruction, instruction-related, support services, and other elementary/secondary current expenditures, but exclude expenditures on capital outlay, other programs and payments to state and local governments, interest on long-term debt, and payments to private and charter schools. Charter schools typically receive 20% less than district schools for day-to-day operations and must service any debt from their operational funds.

Market Area

After considering our mission, the current charter market and school funding options, Lighthouse Academies developed the following metrics to determine the sustainability of different locations for Lighthouse Academies' charter schools, after considering our mission, market drivers, the market size and government funding for education:

- High poverty count as measured by the number of children participating in the free and reduced lunch program
- The number of underperforming schools as determined by the adequate yearly progress (AYP) measures of NCLB
- High percentage of children of color
- A per pupil allocation of at least \$6,800
- Ability to cluster schools into a region

¹⁰ National Center for Education Statistics, *Digest of Education Statistics 2009, Table 1*

¹¹ Ibid.

¹² National Center for Education Statistics, *Digest of Education Statistics 2009, Chapter 1*

¹³ National Center for Education Statistics, *Revenues and Expenditures for Public Elementary and Secondary Education FY08, Table 2.*

¹⁴ Ibid.

- Additional school units can be added in a cost effective manner
- Affordable facility solution
- Additional local resources that may be available
- Ease of obtaining a charter
- A governance structure where LHA has a representative (s) on, the local board
- Percentage of district students enrolled in charter schools
- A clearly stated path in the statute for charter renewal
- Capacity of LHA to expand
- Cost of travel in expense and time to travel to and from the national office

Using these criteria, Lighthouse Academies has developed charter schools in New York, Indiana, Illinois, Arkansas and the District of Columbia. Some sites have a per pupil allocation of less than \$6,800, but other cost savings to offset the lower per pupil.

Organizational Growth and Development Cycle: 2010-2011

Overall, student enrollment increased by 8% this year. LHA opened the Metropolitan Lighthouse Charter School in New York City and one new College Preparatory Academy in Indiana this fall. Enrollment on count day exceeded the FY 11 projection with a wait list of almost 3,000 students. Table 2 shows current school locations and number of enrolled students.

Table 2. Location of Current Schools

Cluster	Number of Schools 2010-11 ^a	Projected Number of Students 2010-11	Actual Number of Students 2010-11	Percent of Projection
New York City	3	600	615	103%
Washington DC	1	274	241	87%
Northwest Indiana	5	1,606	1645	102%
Indianapolis	3	1,243	1225	97%
Chicago	1	466	471	101%
Arkansas	1	394	394	100%
Totals	14	4,583	4,591	100%

^aLHA manages eleven charters: five held by Lighthouse Academies of Indiana, one held by Lighthouse Academies of Arkansas, a subsidiary of Lighthouse Academies, Inc., one held by Lighthouse Academies of Wisconsin and five held by the local school boards. Lighthouse Academies counts the number of schools by the number of principals.

From a national perspective, LHA operates schools in three of the top 15 markets for charter schools (Washington D.C., Gary Indiana and Indianapolis Indiana) as measured by the percentage public school students in charter schools, and two (Chicago, New York City) of the top ten school districts as measured by the number of public school students enrolled in charter schools.

LHA schools enroll 28% of all students who attend charter schools in Gary, Indiana, and 17% of the students who attend charter schools in Indianapolis, Indiana.

The Lighthouse Academies Education Model

Our mission is to prepare our students for college through a rigorous, arts-infused program. Our arts-infused pedagogy engages students in the core subject areas by using practices and principles of the arts. Classroom teachers, community arts partners and arts specialists collaborate to create lessons and activities that use practices and principles of art to increase achievement by engaging students, reinforcing skills and assessing student learning.

Core Elements of our Design

College Focus

It is our job to make college real and attainable for all of our scholars, which is why college is a focus that permeates our school culture. Our rigorous programs provide students with the academic and social foundation necessary for success in college.

Arts Infusion¹⁵

Arts infusion is a powerful approach to teaching that enhances student learning and increases student engagement in education.

We believe arts-infused instruction is an effective way to:

- **Activate** student interest
- **Engage** students in learning activities
- **Assess** students' understanding of content and concepts

Every day at Lighthouse Academies, we infuse art activities and techniques into the teaching of all core subjects.

Standards-Driven, Rigorous, Research-Based Curricular Programs

The LHA Education Model is anchored in grade level state standards, which define what students should know and be able to do at each particular grade level. High quality research based curricular programs, including Imagine It![®], Saxon Math[®], FOSS[®], Pearson Core Knowledge[®], as well as varied instructional frameworks such as Understanding by Design and readers/writers' workshop, provide the foundation for school-wide instruction and enable students to meet learning standards.

Classroom instruction includes a mix of whole-class, small group, and individual work. Teachers follow a pattern of presenting engaging mini-lessons to demonstrate new skills, creating flexible groupings in which students can practice those skills and giving students

¹⁵ Lighthouse Academies is participating in a multi year evaluation of the impact of an arts-infused program on student achievement. Learning Through An Expanded Arts Program, Inc is conducting the study under a U.S. Department of Education grant.

practice work that they can do independently. All work gives students numerous opportunities to demonstrate what they know and are able to do in terms of mastering specific standards.

Social Curriculum and SHINE

Lighthouse Academies believes the social curriculum is as important as the academic curriculum. We believe there is a set of qualities (social skills and character traits) that all children need in order to be successful through college and life. These qualities are included in our SHINE character education program:

- Self-Discipline
- Humility
- Intelligence
- Nobility
- Excellence

The foundation of the social curriculum is the school-wide use of the *Responsive Classroom*® (K-4); Developmental Designs for Middle School (DDMS) (5-8) and Advisory (CPA) approaches. These programs ensure that all children develop their social skills simultaneously with their academic skills throughout the entire instructional day. Through the social curriculum, we support our scholars in being successful academically, acquiring the skills necessary to work collaboratively with others, as well as building self-management skills that help prepare them for college. All teachers and leaders participate in targeted and ongoing professional development on these programs in order to continue to develop and refine their practice. Developing a positive school culture is an outgrowth of a solid social curriculum. Our small community model creates a learning environment where students are known well, develop unique talents and interests, connect with adult mentors and develop the life skills they will need for life after high school.

Data to Drive Instruction

At LHA, we use a variety of assessments and data tools to inform instruction, identify areas of growth, and increase student achievement across the Network. The three main sources of data are (1) state assessments, (2) NWEA Measures of Academic Progress (MAP) for grades 2 and above and the Primary Grades Assessment (PGA) for students in Kindergarten and first grade, and (3) curricular assessments aligned to state standards. In addition, individual schools may monitor student achievement using other assessments, including state specific diagnostics and/or Dynamic Indicators of Basic Early Literacy Skills (DIBELS), Developmental Reading Assessment (DRA), etc.

All of these measures combine to create a rich data set that teachers and school leaders use to inform instruction as well as monitor student, grade level and school progress on an ongoing basis (See Appendix B). The ongoing collection and analysis of data guides teachers' planning of instruction and ensures that teachers plan instruction to meet students' individual needs. Such data guides the focus of each student's Individual Learning Plan (ILP), which targets specific skills that the student needs to develop.

Professional Development

LHA believes the education program is only as good as the teachers teaching it. Therefore, we invest significant time both before and during the school year to provide intensive professional development opportunities for all staff members. A minimum of 20 professional development days are scheduled into the school year to address the needs of our teachers and staff to continually develop our skills and knowledge and demonstrate our commitment to nothing less than excellence. Each summer, the LHA network convenes in a central location to kick off the school year at the Network Summit. All instructional staff members participate in this weeklong event, focusing on our LHA Education model and excellent instructional practices. The remaining 15 professional development days are planned by individual LHA schools and are generally completed at the school site. The school leadership team plans and implements these professional development days via their school's Professional Development Institute (PDI) as well as over the course of the year based on the school calendar.

More Time on Instruction

To ensure that all students master the work necessary to prepare them for college, LHA provides more time on task. This means a **longer school year** (190 instructional days) and a **longer school day** (8 hours). Instruction begins promptly at 8:00 A.M. and students work diligently throughout the day until bus dismissal at 4:00 P.M. We believe this is urgent work and that every second counts, therefore we push the limits and ensure students have learning opportunities through the last possible minute of the day.

School Organization

The Pre K-12 model is organized into three academies: Lower Academy (PreK-4), Upper Academy (5-8) and College Preparatory Academy (9-12). When fully enrolled, our schools will have no more than 680 students in pre-Kindergarten to grade twelve. Typically, the school starts with Kindergarten to grade five with 290-325 students. In some places, the school is smaller in the first year due to facility availability or statutory considerations such as collective bargaining. The average class size is not more than 25 students per class.

Typically, in a Kindergarten – grade 4 school, the staff in the first year includes the following positions¹⁶:

- Principal
- Director of Instruction
- Director of School Culture
- Office Manager or Business Manager
- Special Needs Teacher(s)
- Specialists
- Classroom Teachers
- Family Coordinator
- Arts Partner

¹⁶ Final staffing is subject to school funding.

State statute determines whether a pre-Kindergarten class can be offered. If offered, one of three models may be used. The first option is that Lighthouse Academies may contract with a non-profit pre-school program to house a class(es) in the charter school. The organization pays a fee for the use of space. LHA has input into staffing and the education program of such a pre-school program to ensure it aligns with the Education Model. This approach has the benefit of creating additional pre-Kindergarten slots and a revenue stream for the school. These students may choose to apply to enroll in the school for Kindergarten.

The second option is where LHA operates the pre-Kindergarten under the charter, with government paying the cost of the program. In this model, LHA controls the staff and the program. Students are entitled to enroll in Kindergarten the following year. For example, in Washington D.C., pre-Kindergarten is government-funded, so the second option is used. In Indiana and New York City, pre-kindergarten is not part of the grade structure of the charter school under current state statute. In these instances, we use the first option. The third option is to run our own Pre-K program in the school. LHA currently operates a program in Indianapolis within the school. This option is used when the other two options have proven to be impossible.

Looping

Looping is an instructional strategy used at LHA to foster relationship building between students and teachers and to provide a stable and predictable environment for students. Beginning in first grade, students spend two years with their teacher. Through looping, teachers can develop a deeper understanding of students' learning styles and needs, better understand the needs and expectations of families regarding their children's education, and approach the curriculum in greater depth, knowing that there is more time to help students make connections¹⁷. The looping structure at

Academy	LHA Looping Structure
<i>Lower Academy</i>	Pre K
	K
	1-2
	3-4
<i>Upper Academy</i>	5-6
	7-8
<i>College Prep</i>	9-12

LHA begins in first grade, allowing us to develop a solid consistent Kindergarten team to provide a strong foundation for all students. The table to the right shows the ideal looping structure; the actual looping pattern may vary based on enrollment and staffing at each school.

Academic Programs

The foundation of any strong academic program is reading. LHA uses a research-based program – Imagine It! with leveled readers and quality literature in grades K-6 to give all students a base in phonics and the opportunity to read a wide variety of texts. Elementary students spend at least 90 minutes per day reading and writing.

¹⁷ Grant, Jim; Johnson, Bob, and Richardson, Irv. *The Looping Handbook: Teachers and Students Progressing Together*. Crystal Springs Books 1996

II/OCR is a comprehensive reading program that emphasizes the five components of effective reading instruction: phonological awareness, phonics, vocabulary/word study, fluency and comprehension. Students read leveled selections that are included with the series. II/OCR is recognized as a research-based reading series, which is called for by the *No Child Left Behind Act* (NCLB).

In grades 7-12, when students have completed the II/OCR series and are reading with greater fluency, the courses are built upon the state standards using a backwards-design approach (Understanding by Design, or UbD). English Language Arts for the Upper Academy and College Prep Academy is focused on reading high-quality literature, mastering standard conventions and vocabulary, and completing rigorous writing and speaking performances. Students in the Upper Academy and College Prep Academy also make use of Readers' and Writers' Workshop and literature circles to analyze the texts from the class.

Mathematics

Mathematics instruction at LHA is highly structured. Teachers emphasize mastery of concepts through practice over time in order to build a solid mathematics foundation for every child. The school uses the *Saxon Mathematics* program as the basis for mathematics instruction, K-12. Saxon Math presents concepts in carefully sequenced increments, allowing students to learn new concepts in each lesson as well as to practice and review previously introduced concepts. It takes students through algebra by the end of 8th grade and thus prepares them to tackle the college preparatory program in high school.

In the College Prep Academy (CPA), we recognize that four-year course sequences may vary according to individual students. We provide a range of offerings for our students to accommodate differentiated progress through the mathematics course sequence. We expect our students to take four years of mathematics to graduate from the College Prep Academy.

Science

Science instruction at LHA has a strong basis in lab work, exploration, and mastery of specific concepts. To teach the core content topics and scientific method, we provide all K-8 classrooms with the science kits created by researchers at the University of California, Berkeley, known as the *Full Option Science System (FOSS)*¹⁸. FOSS kits provide all materials and instructions a teacher needs to conduct demonstrations and labs in the regular classroom.

FOSS kits provide the basis for the curriculum through 8th grade, at which point students in the CPA use a combination of resources – text as well as inquiry based kits (i.e. *It's About Time*)¹⁹. Students will have access to Advanced Placement courses and/or differentiated honors syllabi within science courses.

¹⁸ More information available at www.lhsfoss.org.

¹⁹ More information available at www.its-about-time.com.

Social Studies

As students at LHA work toward mastering state standards. In social studies, they use a wide array of monographs, textbooks, stories, videos, web sites, maps, pictures, and other historical sources to study cultures, geography, and social sciences. No highly successful social studies teacher can rely solely on one textbook.²⁰ As a resource, however, we make the Pearson Learning *History and Geography Series*, edited by the founder of the Core Knowledge Foundation, available to all students and teachers in grades K-6. In the Upper Academy and College Prep Academy, social studies units are designed using Understanding by Design (UbD) framework and are rooted in state social studies standards. Some content may come from the Core Knowledge sequence; yet it is not the basis for instruction because of state-specific content standards. A variety of primary and secondary sources is utilized in the Upper Academy, including but not limited to Joy Hakim's *History of US* series and Pearson's *World Studies* series.

Support Services

Special needs students, English language learners (ELLs) and gifted students participate in the grade level classroom, receiving specific supports as needed. We believe strongly in a full inclusion or "push in" model, as opposed to isolating students in separate classes. While these students are aiming towards the same high standards, they receive accommodations as needed and required by their IEP. In addition, we will use a Response to Intervention (RTI) model for identifying students who are falling behind and providing structured support to them. Teachers work with the highly trained staff – the Director of Instruction, special education director, special education teacher and/or an ELL-certified teacher – to incorporate different appropriate practices into their teaching and planning.

English Language Learners

ELL Instruction at LHA is a structured immersion program. Students are placed in an age and grade appropriate mainstream classroom with support. Younger students in the primary grades need exposure, immersion, good instruction and time. Minimal, if any, pull out services are provided. For scholars in the intermediate and middle grades, small group supplemental instruction (pull out or in class) in phonics, vocabulary and grammar may be offered, in the context of the regular classroom and directly related to the content of the daily instruction.

Before enrollment, the school's ELL teachers engage and educate families for which English is a second language about the school's educational program and support services for ELLs. During the enrollment process, the school distributes a home language survey to identify preliminarily language minority students. A team of teachers, including the student's classroom teacher, and an ELL-certified teacher, evaluate the student to determine whether the student is Limited English Proficient (LEP) or Non-English Proficient (NEP) based on state guidelines. The staff then meets with parents to discuss their child's need for specialized

²⁰ "Six Questions to Ask on Back to School Night." *The Thomas B. Fordham Foundation*. Web site text, located at <<http://www.edexcellence.net/foundation/publication/publication.cfm?id=319>>.

support services, the educational approach used to teach ELLs, and the parents' right to remove their child from receiving ELL services.

The ELL teacher meets with classroom teachers and/or grade level teams frequently to assess the progress of ELL students and plan and deliver professional development. The ELL teacher also communicates with families about their child's progress at least quarterly, and acts as liaison between the school and language-minority families, providing or arranging for translation services and attending conferences between teachers and parents and community meetings for the school community.

Special Education

To the maximum extent allowed by each student's individualized education plan (IEP) and all applicable federal laws, including the Individuals with Disabilities Act (IDEA), the school educates students with disabilities in the least restrictive environment, with their non-disabled peers. Special classes, separate schooling or other removal of students with disabilities from the regular educational environment will occur only if the nature or severity of the disability is such that education in regular classes, with the use of supplementary aids and services, is not an option, or an existing IEP requires a substantially separate program.

The primary model for delivery of special education services is inclusion. Students with an Individual Education Plan (IEP) receive support and modified work in class. To the maximum extent appropriate, students with disabilities participate in, and where appropriate receive credit for, nonacademic, extracurricular and ancillary programs and activities with all other students. Students with disabilities receive all notices concerning school-sponsored programs, activities and services.

Response to Intervention (RTI)

RTI is a system of tiered interventions for students who are not meeting standards. Tier I is universal intervention, or an agreed upon set of interventions for all students that are employed to assist with learning differences that are represented in every classroom. If students do not demonstrate adequate progress because of these interventions, they are moved to Tier II. In Tier II, students receive more intensified interventions with a course of pre-established checkpoints to determine if progress is being made. If progress is not demonstrated, students are then moved to Tier III. In Tier III, interventions are very intense and they likely include increased instructional time. Again, the students are provided progress benchmarks and check-ins. If progress is not made, it will be recommended that the student may need additional support because of a special learning need and should be referred to special education. If progress is made, a committee ascertains whether the student can be successful if the intensive supports are gradually reduced. The ultimate goal is to assess whether or not the student can be placed on a different learning trajectory and be independently successful without intensive supports.

Gifted Students

We are also well prepared to serve gifted and talented students. Much of our work allows opportunities for these students to go farther and faster as appropriate – students could use

lab equipment designed for older grades, for example. Our methods of assessment, designed to give each student specific, targeted feedback, also serve to give gifted and talented children the support they need to continue making progress. Open-ended problems challenge students who quickly master the Saxon material, and the Core Knowledge Sequence provides a great amount of worthy literature for students reading above grade level.

Extra Help for Students

The classroom teacher provides extra help for students. Each school also seeks to develop a volunteer program to provide tutors. The model school budget shows the amount of funds budgeted for additional support at each school. Additional support may include paid tutors, volunteers, After School Academics (ASA), Saturday school, and summer school.

Business Development 2011-2014

In 2003, our primary focus was to become a self-sustaining organization in five years. We reached that point in 2009-2010. At this time, LHA does not need to raise additional capital to continue to expand.

Table 3 shows the mostly likely growth pattern for the next three years within the existing clusters. Please note that the Indiana region has two distinct clusters – Northwest Indiana and Indianapolis. See Appendix D for list of charters and renewal dates.

Table 3. LHA Current Target Areas

REGION	EAST Cluster: New York City <i>P. Forsyth VP</i>	EAST Cluster: Washington DC <i>R. Kelly VP</i>	INDIANA Cluster: Northwest IN <i>K. Sia VP</i>	INDIANA Cluster: Indianapolis <i>K. Sia VP</i>	MIDWEST Chicago & Milwaukee <i>A. Knox VP</i>	SOUTH Arkansas <i>Dr. Nichols-Anderson VP</i>
FY 2011	<ul style="list-style-type: none"> ▪ Added 1 grade BLCS ▪ Opened MetLCS K-2 	<ul style="list-style-type: none"> ▪ Grades PK-5 ▪ Charter renewal begins 	<ul style="list-style-type: none"> ▪ Opened CPA WG ▪ Charter renewal GLCS begins 	<ul style="list-style-type: none"> ▪ Added 1 grade at ILCS ▪ Charter renewal ILCS begins 	<ul style="list-style-type: none"> ▪ BZ Charter Renewal K-8 ▪ BZ Charter Expansion 	<ul style="list-style-type: none"> ▪ Added 1 grade ▪ Amendment for 2nd location ▪ Applied for 2nd charter Pine Bluff
FY 2012	<ul style="list-style-type: none"> ▪ Open BLCS CPA ▪ Add 1 grade MetLCS 	<ul style="list-style-type: none"> ▪ Add 1 grade 	<ul style="list-style-type: none"> ▪ Add 1 grade ▪ Open ECLCS CPA ▪ Charter renewal at ECLCS and WGLCS begins 	<ul style="list-style-type: none"> ▪ Add 1 grade ▪ Open MLCS CPA ▪ Charter renewal for MLCS begins 	<ul style="list-style-type: none"> ▪ Add 1 grade ▪ Open BZ CPA 	<ul style="list-style-type: none"> ▪ Add 1 grade to JLCS ▪ Open PBLCS K-4 ▪ Open JLCS Flightline Campus 6-8
FY2013	<ul style="list-style-type: none"> ▪ Add 1 grade in both schools ▪ Charter renewal begins for both schools 	<ul style="list-style-type: none"> ▪ Add 1 grade 	<ul style="list-style-type: none"> ▪ Add 1 grade all schools 	<ul style="list-style-type: none"> ▪ Add 1 grade all schools 	<ul style="list-style-type: none"> ▪ Open NPLCS with K-4 ▪ Add 1 grade 	<ul style="list-style-type: none"> ▪ Open CPA JLCS ▪ Add one grade to PBLCS
FY2014	<ul style="list-style-type: none"> ▪ Add 1 grade in both school 	<ul style="list-style-type: none"> ▪ Add 1 grade 	<ul style="list-style-type: none"> ▪ GLCS complete K-12 ▪ Add 1 grade WGLCS, ECLCS 	<ul style="list-style-type: none"> ▪ ILCS complete K-12 ▪ Add 1 grade MLCS 	<ul style="list-style-type: none"> ▪ Add 1 grade 	<ul style="list-style-type: none"> ▪ JLCS charter renewal ▪ Add 1 grade to each school

Table 4 shows the projected number of students assuming the expansions of current schools through 2014.

Table 4. Number of Current Schools with Growth

Region	Cluster	Schools 2011	Students 2011	Schools 2012	Students 2012	Schools 2013	Students 2013	Schools 2014	Students 2014
East	New York City	3	615	3	666	3	750	3	750
	Washington D.C.	1	238	1	325	1	365	2	405
Indiana	NWI	5	1,645	6	1,740	6	1,820	6	1,880
	Indianapolis	3	1,225	4	1,300	4	1,350	4	1,400
Midwest	Chicago	1	471	2	506	2	556	2	606
	Milwaukee					1	235	1	285
South	Arkansas	1	394	3	819	4	919	4	1,019
	Totals	14	4,588	19	5,356	21	5,995	22	6,345
	% Growth		8%		17%		12%		6%

*Note: The number of schools is defined by the number of Principals, not the number of charters.

Table 5 shows *potential* new school development projects.

Table 5. New School Development Projects

Region	Cluster	Schools 2012	Students 2012	Schools 2013	Students 2013	Schools 2014	Students 2014
East	New York City			1	128	1	128
	Washington D.C.						
Indiana	NWI Indianapolis IN			1	250		
Midwest	Chicago IL			1	250		
	Milwaukee WI			1	250	1	250
	Greater Detroit	1	250			1	250
South	Arkansas	1	250				
	Tulsa OK	1	250			1	250
	St. Louis MO	1	250				
	Nashville, TN	1	250				
	Memphis, TN			1	250		
	Totals	5	1,250	5	1,128	4	878

New opportunities are being evaluated for opening Pre K-4 schools. LHA is piloting using local accounting and technology in new start-ups. By localizing these services, LHA can expand to more locations as new state financial systems represent the most significant operational challenge to expansion.

The School Start Up

The application process for a new Lighthouse charter school starts with the selection of an under-resourced community. In general, Lighthouse Academies focuses expansion on urban

populations in the top 50 cities in the United States. Once a community is identified, a legal structure is selected and a local board, whose function is to support the principal and Lighthouse Academies in the operation of the school, is recruited. The local board will be comprised of Lighthouse Academies staff, where permitted, civic leaders and parents of children who enroll in the school.

Charter Facilities Management (CFM) a subsidiary of LHA, identifies facilities options for the proposed school. Once a facility is selected, CFM works with commercial lenders and other entities to secure financing.

Upon award of the charter and securing a facility with the necessary financing, the task of opening the school is assigned to a regional vice president who works with the corporate and regional staff and the school principal to open and operate the school. The regional vice president based in the region is the key person in the management of the interface of local and national staff and services. The regional vice president and national staff work from the Lighthouse Academies Start up Checklist™, which includes over 200 discrete items to complete before a school opens. Vice Presidents currently oversee clusters of one to eight schools. A regional director who reports to the regional vice president may be added as the region expands. School leaders report to the regional director or in the absence of a regional director to the regional vice president.

The national office in conjunction with the regional vice presidents provides the following services to schools in the network: development of the education program, recruitment and training of school leaders, grant writing, legal advice, human resources, accounting and technology systems and support. Lighthouse Academies subcontracts some aspects of human resources.

LHA may provide a start-up loan to each charter school to assist with the development and opening of the school. LHA may also provide a letter of credit to help finance the leasing of school equipment.

Facilities, Furniture Fixtures and Equipment

To date LHA has developed facilities through partnerships with school districts and other nonprofit organizations. In addition to CFM, we currently work with Building Hope (Indiana), Charter School Development Corporation ((Washington D.C.), Civic Builders (NYC), Illinois Facility Fund(Indiana, Chicago, Milwaukee and St. Louis), Local Support Initiatives Consortium (Indiana and Arkansas)and Southern Financial Partners (Arkansas) to secure facilities and financing. financing. Our model has assumed an initial five-year lease with options for renewal and purchase. In most instances, we have agreed to subordinate our management fee as a guarantee for the lease or financing.

As LHA schools establish an operational history that includes excellent academic results, high levels of parent satisfaction, student reenrollment, and a financial surplus, the local board or an entity controlled by LHA will purchase the facility. In December 2006, LHA incorporated Charter Facility Management LLC (CFM) to support our efforts to develop and

maintain quality facilities. CFM raised \$20 M in debt equity in FY2009. CFM purchased three school sites in Indiana with these funds. CFM also leases a building in East Chicago, IN with the East Chicago Lighthouse Charter School as the tenant. Currently, CFM provides facility management and other services to ten LHA campuses in four states and the District of Columbia and services to four non-LHA charter schools in Ohio.

Competitive Strengths

The Lighthouse Academies Team

- We have assembled a management team that combines valuable business experience in the charter market with substantial professional education experience.
- We have a diverse Board of Directors with deep experience in the charter market, organizational development, finance and non-profit businesses.
- Our employees share a dedication to the mission of helping all children reach high levels of academic achievement and personal development and preparing for college.

Revenue model

- We operate as a fee-for-service nonprofit corporation with each school as a cost center.
- We receive either a fixed service fee or a percentage the school's per pupil allocation and non-competitive categorical funds. In addition, Lighthouse Academies may earn a bonus for meeting agreed upon academic and non-academic goals as well as a small start-up fee to cover out-of-pocket expenses.
- All surplus funds from a school's operation will remain in the local charter school's account to support future development.

Controlled cost structure

- We maintain relatively low central office expenses and create efficient internal systems that allow us to compete effectively with other nonprofits and for-profits.
- We focus on geographic regions in which we can create clusters of up to six schools, in an effort to capitalize on local economies of scale.
- We have established a corporate culture that emphasizes a respect for the fact that we operate and manage public schools, and we are spending public and foundation funds.

Organizational Structure

- Our nonprofit status helps us to enter new markets. We avoid many of the barriers to entry that for profit EMOs encounter.
- Our capacity and support from national foundations makes it easier to enter new markets and obtain multiple charters at one time.
- Our capacity and competency in managing school operations make us a more desirable choice to many authorizers and community leaders than a "mom and pop" school applicant.

Lighthouse Academies and Support Services

Depending on the authorizer's approval cycle, the startup process, from initial identification of a location through the actual opening of a school, may require up to twenty-four months. During this period, and after the school opens, we will provide the following services:

Application for a charter: We will develop the master charter application. The application will include a five-year budget projection.

School operations: A Regional Vice President and Regional Director assist each school to support the day-to-day operations of the school. The Education Team also supports the schools through curriculum and professional development.

Accountability plan: We will develop an accountability plan for each charter school. The plan will include academic and non-academic goals.

Budget development: The principal and Lighthouse Academies develop the annual school budget which supports the education program. The principal will be required to sign off on the allocation of resources at the school.

Facilities: Lighthouse Academies will provide support and direction with facilities solutions for schools through Charter Facilities Management (CFM) a wholly owned non-profit subsidiary of LHA. Where appropriate, CFM will support schools to find, assess, and prepare for operations, buildings suitable for school usage. CFM, through a subsidiary, may also own the school building. Once the school is open, CFM will provide support with facility maintenance and financing. CFM may provide school transportation services. LHA is seeking to spin off CFM as a separate non-profit entity in 2011. LHA and CFM will enter into a strategic partnership to develop future LHA sites.

Compliance: Lighthouse Academies provides technical support to schools in the area of special education, section 504 and English Language Learners. Lighthouse Academies' schools may choose to be a Local Education Agency (LEA) for special education depending on the state statute and local regulations.

Curriculum review and professional development: We will provide each school with the Lighthouse Academies Curriculum™ and initial staff development and systems to implement the curriculum. The curriculum will include a framework for each core subject, required materials and assessment strategies.

Financing: We help the school obtain startup and facility financing. We may also provide short-term cash flow loans and security for letters of credit for equipment financing.

Operations manuals and handbooks: Each charter school receives a *Lighthouse School Operations Manual*, the *Lighthouse Employee Handbook* and the *Lighthouse Handbook*

for Students and Parents/Guardians. The student handbook will reflect local needs. The staff handbook will include personnel policies, including benefits information, and staff rights and responsibilities. The *School Operations Manual* covers all aspects of the daily operation of the school.

Marketing: We will develop an initial marketing plan for each new charter school. The plan includes strategies to effectively recruit and enroll students in a given area using methods best suited to that community. We will also assist existing schools with annual marketing plan updates. We will provide a marketing toolkit that includes standard network marketing tools and templates for school-specific tools.

Principal recruitment and selection: We will recruit outstanding school leaders from across the country. We are actively working with organizations such as New Leaders for New Schools and the Teach for America to support this effort. Our principals must have the attributes, values, knowledge, and skills needed to lead the charter school staff and create an environment where the Lighthouse Academies Cycle of Success is the norm. We evaluate the principal's performance annually through a comprehensive performance management system that focuses on attainment of the school's academic and non-academic goals.

Purchasing: We will help procure the initial technology, equipment and supplies for each charter school through Lighthouse Facilities Management. Each year, we will issue a request for proposals for equipment, materials and supplies for our schools in order to obtain the best price and value. Each charter school will share the benefits of this group purchasing.

Staff Recruitment and Selection: We will support school leaders in the recruitment and selection of staff who possess the attributes, values, knowledge and skills needed to help each child reach a high level of academic achievement and character. All staff will be employees of Lighthouse Academies, Inc., where legally allowed. The principal will have the authority to hire and fire staff.

Technology will play an integral role in our program and services. A web-based system will support the management of the Lighthouse Academies education program. This system will assist teachers in the development of standards-based lesson plans and projects. Each Lighthouse classroom will include classroom-networked computers with access to the Internet. Laptops are provided for student use in the College Prep Academy. In addition, each administrative office will have a desktop computer connected to our network. Operations manuals and forms will also be available on the company's web site for downloading and use at each school. Payroll and human resource functions, including staff and teacher recruitment, use web-based systems.

Financial Model

Corporate

When LHA employs the staff, LHA provides the above-referenced services for an average annual service fee of 7.5 percent, and a one-time start-up fee for the cost of obtaining and preparing to operate the school. Where the local Board employs the staff, LHA charges a flat fee and a one-time start-up fee for the cost of obtaining and preparing to operate the school. In addition, LHA seeks to earn a bonus for performance based on the achievement of academic and non-academic goals. When starting a new region LHA will employ local accounting and business management support funded by the school budget. LHA receives an additional fee when a College Prep Academy opens. In addition, all LHA out of pocket costs are reimbursed by the schools.

School

The model assumes a base per-pupil allocation for each student of \$6,800. In addition, the model assumes Title I and other federal funds, including a three-year charter school planning and implementation grant. The model assumes that the school will scale up from roughly 260 students to 650 students, although facility availability or other factors may result in a school's opening with a smaller population.

Accountability

Goals adopted by Lighthouse Academies for all schools in the network are listed in Appendix A. Each charter school will develop an accountability plan, which will include performance goals one and two and internal and external measurements to ascertain progress. The goals for each school are in the charter application. Each charter school will participate in the state assessment program and issue an annual school report card to parents and the community.

An external evaluator, hired by Lighthouse Academies, using the network goals will evaluate each charter school annually. Lighthouse Academies uses data from the external review to evaluate the principal and to drive staff development and program adjustments.

Capital Raised

LHA raised \$10.64 million in contributions to support the development of the Network. LHA does not need to raise any additional funds to support its planned expansion.

▪ Walton Family Foundation	\$4.24 million
▪ The Pisces Foundation	\$3.05 million
▪ New Schools Venture Fund	\$2.68 million
▪ Robin Hood Foundation	\$440 K
▪ Tiger Foundation	\$180 K
▪ Simon Foundation	\$ 50 K ²¹

²¹ These funds funded a pilot supplementary reading program at Bronx Lighthouse for the Network.

Table 6 shows the summary of LHA projected finances based on current and projected growth. LHA will need to continue to manage its expenses as it expands. The Loan Development Fund is a source of short-term credit to assist LHA schools with cash flow needs.

Table 6. Summary of Projected Financial

	<u>2009-10</u>	<u>2010-11</u>	<u>2011-12</u>	<u>2012-13</u>	<u>2013-14</u>
Number of Schools ^a	9	14	20	21	22
Number of Students	4232	4588	5591	6045	6395
OPERATIONS					
Management Fees, Reimbursements and Income	\$3,006,667	\$3,052,500	\$3,416,328	\$3,446,741	\$3,527,753
Operational Expenses	\$3,179,125	\$3,884,352	\$3,677,836	\$3,874,616	\$3,745,234
Operations Net Income	(\$172,458)	(\$831,852)	(\$261,508)	(\$427,874)	(\$217,481)
Capital Needs: Operations	\$172,458	\$831,852	\$261,508	\$427,874	\$217,481
FINANCING					
School Financing	\$36,000	\$5,000	(\$51,000)	(\$65,000)	\$0
Total Financing Needs for Operations	\$208,458	\$836,852	\$210,508	\$362,874	\$217,481
Donations to Corporate	\$2,460	\$100,000	\$100,000	\$100,000	\$100,000
Surplus (Deficit)	(\$205,998)	(\$736,852)	(\$110,508)	(\$262,874)	(\$117,481)
Cash Balance: assuming 5% loss and no bonuses	\$1,274,714	\$537,862	\$427,354	\$164,479	\$46,998
Cash Balance: assuming no losses and 100% bonuses	-	\$779,862	\$773,534	\$536,479	\$446,998
CAPITAL NEEDS: School Start Up Loans					
Loan Repayment and Fund Interest	\$820,910	\$661,090	\$600,000	\$600,000	\$600,000
Financing Expenses and loans made	\$830,000	\$770,000	\$200,000	\$200,000	\$200,000
Financing Net Change	(\$9,090)	(\$108,910)	\$400,000	\$400,000	\$400,000
Cash Balance -Loan Fund	\$1,044,910	\$936,000	\$1,336,000	\$1,736,000	\$2,136,000

^aThe number of schools is defined by the number of Principals (not the number of charters).

Appendix A: Network Goals

1. **College Acceptance:** 100% of 12th grade students will be accepted to at least one four-year college.
2. **College Success:** Less than 15% of high school graduates attending college are enrolled in remedial courses in English or math in the first semester of their freshman year.
3. **High School Graduation²²:** More than 80% of students enrolled in a Lighthouse Academy in 9th grade will graduate within five full years.
4. **State Proficiency²³ - School Target:** All LHA schools will make AYP.
5. **State Proficiency - Cohort Target:** 75% or more of students who enter a LHA school no later grade 4 and have been in a LHA school for at least three full years will score “proficient/passing” or higher on their state-specific assessments.²⁴
6. **Academic Skills & Knowledge:** For students that have been at the school for three full years or more, the number of students at or beyond the national median percentile in reading and math will increase by at least 10 percent of the grade level cohort each year on NWEA’s MAP Assessment.
7. **Arts Infusion as a Lever for Student Engagement:** All schools receive an average score of three or better (1-4 scale) on the student satisfaction survey for the arts infusion and student engagement sections.
8. **Family Engagement:** All families will participate in at least three of four parent conferences.
9. **Attendance:** The average daily attendance will be at least 95%.
10. **Student Reenrollment:** 95% of K-11 students enrolled on count day will remain enrolled on the following year’s count day with this exception; 75% of 8th grade graduates will reenroll in the College Prep Academy.

²² The LHA graduation rate will be calculated in accordance with the new Title I definition for the *extended-year adjusted cohort graduation rate*. A definition can be found at <http://www.ed.gov/print/policy/elsec/reg/proposal/uniform-grad-rate.html>.

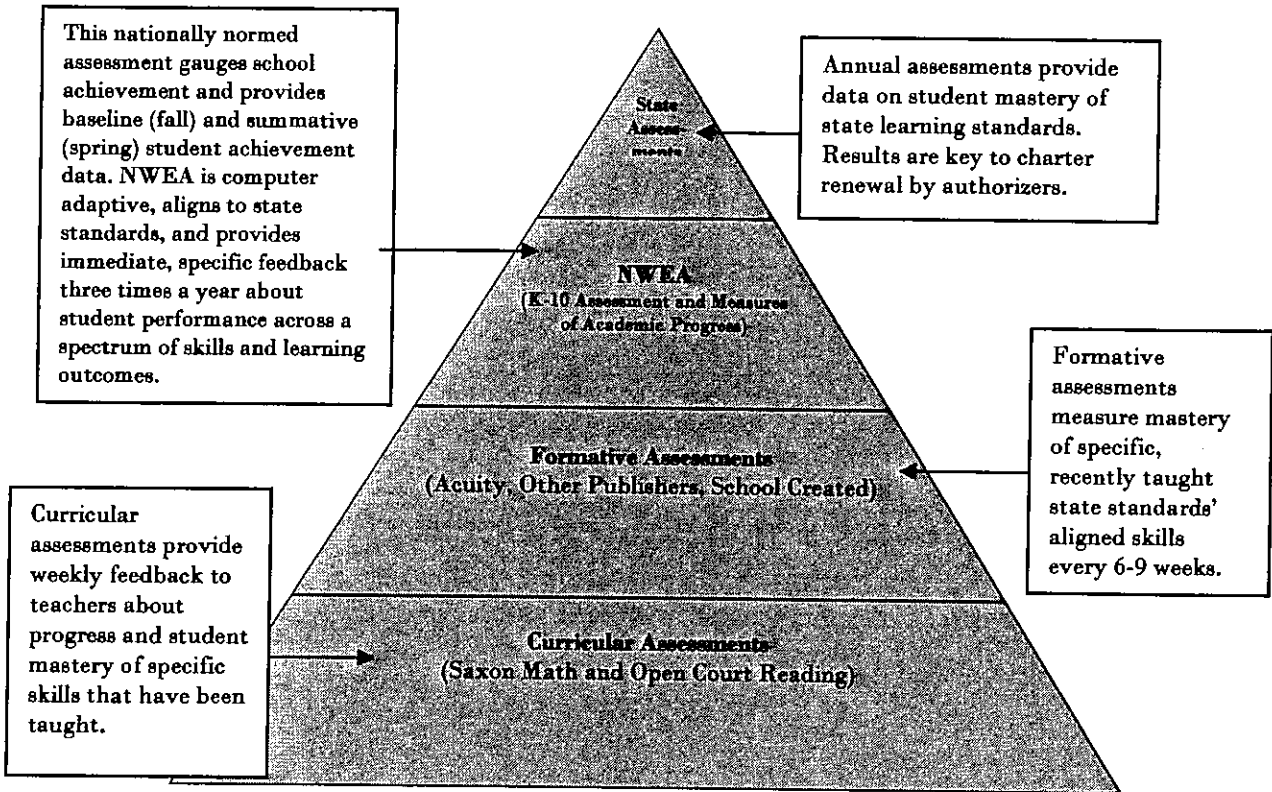
²³ Currently, science and social studies state assessments are not administered at each grade level, and science and social studies results are not a part of AYP determinations under the No Child Left Behind Act. Goal 4 will include science and social studies if/when federal law includes these subjects in AYP determinations. Goal 5 will be enacted in 2010-2011 in advance of anticipated NCLB requirements. Goal 6 will be enacted for social studies and science if/when social studies and science tests are administered in the 8th grade.

²⁴ This target applies to cohorts of students who join a LHA school at any point during 4th grade or earlier.

Appendix B: The Lighthouse Academies Assessment Strategy

Purpose

At LHA, we focus on results and use a variety of assessments and data tools to identify areas of growth, inform instruction, and increase student achievement. The assessment strategy allows use of targeted data for creating school, classroom, and student goals, to measure progress toward goals, to inform the improvement of teacher instruction, and to document student achievement.



Appendix D: List of Charters and Renewal Dates

School	Charter Held By	Authorizer	Grades	Contract/Renewal Date	Term in years	End Date
BLCS	BLCS Board	NYC Dept. of Ed.	K-10	4/2009	5	6/30/2014
BZLCS	BZLCS Board	Board of Ed, Chicago	PreK-8	6/30/2006	5	6/30/2011
ECLCS	LAI	Ball State	K-12	1/4/2005	7	6/30/2013
GLCS	LAI	Ball State	K-12	1/4/2005	7	6/30/2012
ILCS	LAI	Mayor Indianapolis	K-12	11/8/2004	7	6/2012
JLCS	LAA	AR Dept. of Education	K-12	2/26/2009	5	6/30/2014
MetLCS	MetLCS Board	NYC Dept. of Education	K-6	9/14/2009	5	9/14/2014
MLCS	LAI	Mayor Indianapolis	K-12	11/8/2004	7	6/2014
PBLCS	LAPB	AR Dept. of Education	K-12	Pending	5	6/2016
PLPCS	PLPCS Board	DCPCSB	PreK-12	8/22/2005	15	DCPCSB cumulative review in 2009-10
WGLCS	LAI	Ball State	K-12	4/11/2006	7	6/30/2013

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EXPERIENCE:

- Lighthouse Academies, Inc., Framingham, Massachusetts** 5/2009 – Present
Controller
- Effervescent, Inc., Fitchburg, Massachusetts** 11/2007 – 5/2009
Assistant Controller / Controller
Perform accounting and finance functions in small wholesale distribution company with Chinese supplier. Book shipments from China with freight forwarders. Manage general ledger, accounts receivable, accounts payable, inventory. Use NetSuite software. Reconcile on-line bank statements. Complete G/L closings and run monthly and ad-hoc reports. Review financial statements and make recommendations to senior management. Interact with external auditors.
- Devereux Foundation, Rutland, Massachusetts** 3/2003 – 11/2007
Business/Finance Manager
Managed Business Office with four staff-members. Supervised Accounts Payable, Accounts Receivable, and Payroll. Performed general ledger closings and account analysis. Expert in CMHC Accounts Receivable, Cyborg Payroll, Oracle GL/AP/FA, Excel, and Quickbooks. Assisted Director of Administrative Services on a daily basis. Interacted with Worcester Consortium. Supervise food service mealcounts and reimbursements. Maintained good customer service to the Devereux campus with fluctuating staff levels. Selected competent employees to fill vacancies. Oversaw petty cash and client funds. Developed and implemented financial controls and procedures. Interacted with external and internal auditors. Worked closely with Corporate staff in Pennsylvania. Received Support Service award in July 2005.
- Butcher Company, Marlboro, Massachusetts** 10/2001 – 9/2002
Senior Accountant (Contract)
Assisted Controller with monthly closings in Oracle: GL, FA. Wrote Financial Statement Generator code to create P&L statements for divisions and company. Completed and filed state sales-tax returns. Issued international wire payments.
- Lavastorm, Inc., Waltham, Massachusetts** 9/2000 – 9/2001
Accounting Manager / Assistant Controller
Managed monthly GL closings in Oracle 11i. Coordinated AP, AR, FA interfaces to GL; prepared standard and general journal entries; posted payroll; reconciled GL accounts: cash, accounts receivable, prepaid expenses, fixed assets, accounts payable, accrued expenses, notes payable. Issued financial statements through Oracle FSG (Financial Statement Generator) and ADI (Applications Desktop Integrator). Analyzed variances against budget. Managed AP accountant and directed AP postings and payments. Interfaced with senior management and external auditors. Implemented AP, AR, FA, and GL modules in Oracle. Shortened the close-cycle from ten to five days.
- Stone & Webster Engineering Corporation, Boston, Massachusetts** 9/1998 – 9/2000
Senior Accountant, Corporate Accounting
Was first Oracle 10.8 module to go “live,” successfully, and within budgeted time. Participated in SWAT (S&W Action Team) development of Oracle software. Converted over 50,000 assets from old database to Oracle. Managed Oracle fixed-assets system for US, UK, and Canada. Directed fixed-assets accountant. Trained others, including senior management. Coordinated interface between Oracle FA and Oracle AP & GL modules. Was responsible for accurate and timely depreciation (>\$1 million / mo.), additions,

retirements; forecasts of depreciation expense; proper charging to various departments (IT, Reprographics, Building Services). Monitored capital spending. Consolidated worldwide fixed-assets activity. Led preparation of 10Q/10K footnotes for PP&E. Wrote policies and procedures for fixed assets. Also analyzed trial balances of various companies.

Saint Vincent Hospital, Inc., Worcester, Massachusetts 2/1991 – 9/1998

Senior Accountant, Corporate Accounting

Participated in transition from not-for-profit to for-profit entity. Implemented Global fixed asset system. Consolidated financial statements and performed eliminations; tracked capital spending against budget. Developed budget for interest, depreciation, and amortization expense. Interfaced with senior management and other departments. Used Global accounting software, Hyperion. Volunteered as Russian medical interpreter from time to time.

University of Massachusetts Medical Center, Worcester, Massachusetts 1990 – 1991

Grant Accountant (Contract), Department of Pathology

Tracked expenses on medical research grants; issued purchase orders and paid vendors; ensured that grants stayed within budget; and projected current year expenditures.

Data General Corporation, Westboro, Massachusetts 1988 - 1989

Accounting Supervisor, International Manufacturing

Managed one accountant. Consolidated and analyzed financial statements from plants worldwide. Worked closely with plant controllers, senior management, and auditors. Analyzed intercompany payables and receivables between the U.S. and international manufacturing subsidiaries: Hong Kong, Singapore, the Philippines, Taiwan, Japan, and Germany.

Digital Equipment Corporation, Massachusetts 1981 - 1988

Treasury Accountant, International Manufacturing, Marlboro, Massachusetts

Supervised one accountant in Financial Development Program; analyzed U.S. inventory for foreign content in order to develop effective tax rate; developed and implemented hedge accounting procedures in accordance with FAS No. 52; monitored yen purchases; helped train cost accountant in Mexican plant to understand intercompany accounting with standard cost and mark-up to international sales price.

Senior Accountant, Corporate Accounting, Acton, Massachusetts

Consolidated and analyzed worldwide subsidiaries' financial statements; helped prepare fiscal reports of the Corporation (10-K, Stockholders' Reports); considerable experience with personal computers and mainframes; used Lotus 1-2-3 through the macro level. Analyzed intercompany payables and receivables and reconciled variances among subsidiaries worldwide. Supervised one accounting clerk.

Accountant, Corporate Manufacturing, Maynard, Massachusetts

Consolidated manufacturing costs of plants; allocated overhead to divisions; developed corporate forecasts of inventory and costs; analyzed variances; created financial models on the PC.

EDUCATION: Master of Business Administration, Finance, May 1981

Babson College, Wellesley, Massachusetts

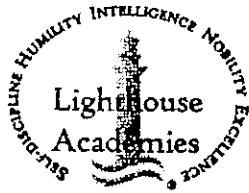
Bachelor of Arts, June 1978

Middlebury College, Middlebury, Vermont

OTHER:

Certified Management Accountant, 1986 – 2002.

Instructed accounting, business, computers in Evening Division,
New England School of Accounting, Worcester, MA



LIGHTHOUSE ACADEMIES POSITION DESCRIPTION

We prepare our students for college through a rigorous arts-infused program.

VISION

All students will be taught by an outstanding teacher in a nurturing environment. Every student will achieve at high levels and develop the knowledge and values necessary for responsible citizenship and life long learning. The impact of our collaborative efforts will fundamentally change public education.

CORE VALUES

Work hard. Get smart.
Graduate from college.

High expectations
equal results.

Nothing less
than excellence.

Today is the day
we make it happen.

Title: OFFICE MANAGER

Reports To: Principal

ESSENTIAL QUALITIES

Lighthouse Academy (LHA) office managers are more than operational managers and administrative support. They help transform children's lives by creating opportunities for a brighter future. We are seeking office managers who will make the commitment to conduct their work with determination, integrity and purpose, embodying these essential qualities:

- Past experiences and actions reflect a commitment to the LHA mission, vision, core values
- A passion and ability to build and sustain the LHA K-12 model in a high need, urban environment
- Work in schools that demonstrates a sense of urgency and the relentless pursuit of high academic student achievement
- Reflective, self-aware and adaptable to communication and work styles of others
- Critical thinker and problem solver who takes initiative
- Belief in the power of collaboration and works to build a collaborative culture with LHA network, community, staff, families and students

ESSENTIAL FUNCTIONS

A Lighthouse Academy office manager works to create and enhance a culture of achievement and respect where high expectations and results are the norm. Office managers' actions must always be aligned with our mission, vision, core values and education program. The essential functions for our office managers are as follows:

ADMINISTRATIVE and OPERATIONAL SUPPORT

- Implement the Lighthouse Academy Procedures Manual by effectively administering all policies and procedural processes.
- Implement the Lighthouse Academy Employee Handbook by effectively administering and providing oversight for all policies and procedural processes.
- Input key school data into LHA's student information system, as well as any other state/district required student information system including attendance, lunch programs, and other data as required by school reporting requirements; continuously update and verify accuracy of data.
- Capture and organize key school data for creation and completion of all district, state and network reports, as requested.
- Assist principal with all aspects of student recruitment: marketing materials, answering parent questions, processing applications, lottery organization, working with parents/guardians to complete enrollment information
- Manage financial processing and record keeping for the school, including invoice processing, cash management, bank deposits, procurement, asset inventory and weekly reporting.
- Collect and update all Human Resources data for the school, including processing new hires, submitting payroll data and changes to LHA.
- Maintain all files and records for the school as may be required to ensure accuracy and confidentiality, as well as efficiency for information collection.

- Complete related clerical/administrative duties as required by the principal and LHA regional support staff.

FAMILY and COMMUNITY RELATIONS

- Communicate in a timely and respectful way with parent/guardians remaining sensitive to different families' cultures, values and needs.
- Initiate and maintain timely communication with all parents/guardians (notes home, phone calls, in-person meetings) concerning required school documentation and procedures; follow up with parents to receive full compliance and participation from all parents/guardians.
- Work collaboratively with families, and other members of the community as requested to aid in the involvement and support of the success of a diverse student population, and to bring in volunteers and additional resources.

PROFESSIONALISM

- Collaborate with colleagues (school-wide meetings, office manager calls, professional development days) to continuously improve personal practice and to support the achievement of the overall goals and mission of the school and the network.
- Access meaningful learning experiences (professional development opportunities, ideas from colleagues and supervisors) and exercise judgment in accepting findings as valid for application in practice and improvement.
- Reflect critically upon experience and practice; identify areas for further professional development as part of a professional development plan that is linked to professional growth and school/network level goals; access meaningful learning experiences; listen thoughtfully to other viewpoints and responds constructively to suggestions and criticisms.
- Use feedback to inform and update Individual Professional Development Plan.
- Fulfill all outlined and related functions professionally, timely and thoroughly.

MINIMUM QUALIFICATIONS

EDUCATION: Associate's degree, preferably in Education

EXPERIENCE, KNOWLEDGE & SKILLS:

- Prior office management and clerical experience in a school environment
- Ability to operate effectively in a busy, open air environment with intermittent interruptions
- Working knowledge of student information systems, PowerSchool experience preferred
- Strong desire to work within an innovative, urban educational program
- Ability to turn best practices into high quality, goal-driven results
- Highly effective interpersonal skills to provide high quality customer service
- Experience using QuickBooks, web based payroll (ADP preferred) and HRIS systems, Microsoft Office Pro software, and ability to effectively use word processing, spreadsheet, presentation and database applications
- Working knowledge of standard office equipment including, but not limited to: PC, copier, fax machine, telephone, and local network and Internet searches
- Ability to complete thorough and accurate written reports/correspondence
- Excellent prioritization and organization skills; demonstrated decision-making and problem solving skills
- Sense of humor

HUMAN RESOURCE INFORMATION

EVALUATION: Annually by the principal; Formal and informal (ongoing) observations; Progress toward standards outlined in Non-Instructional Staff Evaluation and goals outlined in Individualized Professional Development Plan

EMPLOYMENT AND BENEFITS: Per company policy as specified in the individual employment contract

CLASSIFICATION: Full-Time, Administrative (non-academic), and Non-Exempt