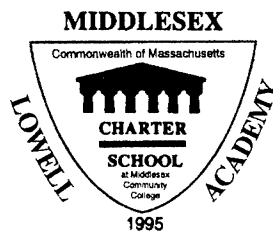


ANNUAL REPORT OF THE LOWELL MIDDLESEX ACADEMY CHARTER SCHOOL



JULY 31, 2011

Lowell Middlesex Academy Charter School (LMACS)

Middlesex Community College

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LMACS is accredited by the New England Association of Schools and Colleges (NEASC)

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Introduction

Entering its 17th year and the second year of its fourth Charter, the Lowell Middlesex Academy Charter School, located in Lowell, Massachusetts, is a public charter high school catering to students who have left their district high school prior to graduation and those significantly at risk of dropping out of these schools. We generally enroll students 16 to 21 years of age - primarily from Lowell - but also serve students from Billerica, Chelmsford, Dracut, Lawrence, Methuen, Tewksbury, Tyngsboro and Westford. The program has grown from a dropout recovery program to a comprehensive program serving up to 150 students. Our curriculum and interventions are designed to meet the needs of over age students enrolling with very little high school credit and those who have on-going obstacles to regular school attendance. The school defines success through the emotional and mental health of our students, as well as college and job readiness and test scores. The school does not ask students to apologize for past school failures, but we do hold them to high standards – standards that reflect academic achievement, progress toward 10 Ethical Values, and the ability to make an informed decision about educational and career options when they graduate.

July, 2011

Dear Friends of the Lowell Middlesex Academy Charter School,

It is my pleasure to report that this year the Charter School successfully completed its 16th year of operation in its fourth charter from the Massachusetts Department of Elementary and Secondary Education.

On June 9, 2011, 16 students graduated. All were awarded diplomas and, I am pleased to report, passed the MCAS in English Language Arts, Mathematics, and Science.

As reported last year, LMACS purchased the Pollard Building as the permanent home of the Lowell Middlesex Academy Charter School. The school occupies the first two floors and leases the upper floors to Middlesex Community College. Renovations to the building infrastructure were on-going throughout the winter and spring and a total renovation to our first floor began early summer.

During the year, the LMACS community welcomed a school nurse and an intern from Northeastern University. The students adjusted well and adapted to the new faces in faculty as well as in the student ranks. The 2010-2011 enrollment campaign saw an increased and more stable student population. Students accepted throughout the school year participated in an extended orientation program that enabled faculty to properly place students and to develop programs designed to meet their specific educational needs.

The Accountability Plan included in the Annual Report has received provisional approval from the Board of Trustees and the Charter School office, but is awaiting final approval from both entities. Final approval by the Board of Trustees will occur at the Fall 2011 board meeting. In terms of our academic projects, we instituted a three phase curriculum model designed to increase the student graduation rate. Finally, the Lowell Middlesex Academy Charter School and the TJX, Company partnership is developing into a complete school/career project that will be initiated next year. Through the generosity of the TJX Educational Foundation, students were able to participate in a school-wide music program and were provided cameras and other art supplies and equipment to enhance the LMACS art curriculum.

I know you join me in expressing my appreciation to the faculty and staff for another successful year.

Sincerely,

Carole A. Cowan, Ed.D.
President, Middlesex Community College
Chair, LMACS Board of Trustees

School Mission Statement

The mission of Lowell Middlesex Academy Charter School (LMACS) is to enable its students to achieve academic, social, and career success. This supportive school community identifies, encourages and develops interests and abilities, while acknowledging and respecting each student's personal and cultural identity.

Our Vision

The curriculum of LMACS is built around a core of academic subject areas and is supplemented by required psycho-educational courses and groups. We require a school-to-work component, daily advising, and offer dual enrollment at Middlesex Community College. The LMACS curriculum reflects our small size and mission-driven culture. LMACS graduates will be able to:



- Read critically and analytically;
- Communicate effectively in writing and orally to a variety of audiences;
- Problem solve in a variety of circumstances;
- Use technology as a tool to gather, analyze and present information;
- Demonstrate a clear awareness of the rights and responsibilities of a community member;
- Demonstrate an understanding and knowledge of a career or educational option in order to develop a plan for the future.

LMACS is committed to the success of every student.

School Performance and Planning

The following sections outline the school's progress towards objectives and measures contained in the school's current accountability plan. For each listed measure, the school has provided evidence for whether the school has met (✓), is making progress toward meeting, or has not met the measure. In each section, LMACS provides information relative to both its accountability plan objectives that were developed by the school and accepted by the Charter School Office, and the Common School Performance Criteria required of all charter schools.

I. Faithfulness to Charter

CRITERIA	OBJECTIVE	MEASURE	STATUS
<p>Mission, Vision and Educational Philosophy</p>	<p>The school is faithful to the mission, vision and educational philosophy defined in the charter application and any subsequent approved amendment(s).</p>	<p>1. Each year, the school will award diplomas only to those students who are prepared for an educational and career option and this preparation is outlined in each student’s individual Five-Year Plan.</p> <p>Academic: Over the course of a student’s time at LMACS, 100% of the graduates will pass all the graduation requirements as recorded on the student’s graduation requirement list with a grade of 70% or better.</p> <p>Social: 100% of LMACS graduates will complete a series of Life Skills classes with a grade of 70% or better.</p> <p>2. Each year, all graduates of the Lowell Middlesex Academy Charter School will have completed an application and a FAFSA form under the supervision of the school, so that they may enroll at any two or four-year college if they so choose.</p>	<p>1. </p> <p>Academic: For the 2010-2011 academic year LMACS graduated 16 students. All students met the academic requirements with passing grades of 70% or better.</p> <p>Social: For the 2010-2011 academic year LMACS graduated 16 students. All students met the Life Skills requirements with passing grades of 70% or better.</p> <p>2. Making Progress</p> <p>All students completed a Middlesex Community College application and participated in a two day workshop provided by the Financial Aid department of Middlesex Community College and completed sections of the FAFSA application. However 2 out of 16 or 12% did not submit the application due to missing parental financial and/or tax information. During the 2011-2012 year parents will be invited to the workshops.</p>
<p>Academic program</p>	<p>The school establishes an academic program that includes the pedagogical approach, curriculum, assessment, and other unique elements defined in the charter application and any subsequent approved amendment(s).</p>	<p>1. Each year, all graduates will satisfy the internship requirement by: completing the internship academic class with a grade of 70% or better and complete 50 hours at an internship placement site approved by the school and monitored by an on-site supervisor.</p> <p>2. Additionally, all students must pass the TJX Youth Business Institute workshops presented by TJX corporate managers. Students will receive a grade of Pass/Fail based on participation, attendance and completion of the workshops.</p>	<p>1. </p> <p>All students successfully completed the Internship requirements of achieving a passing grade of 70% or better and completing at least 50 hours at an approved site.</p> <p>2. Making Progress</p> <p>13 out of 16 or 81% of students completed the TJX Youth Business Institute.</p>

Common School Performance Criteria

Implementation of Mission, Vision, and Educational Philosophy:

Lowell Middlesex Academy Charter School (LMACS) is a school model distinct from traditional high schools and “No Excuses” charter schools. LMACS caters to over age students who leave their district high schools without a diploma. Sometimes misidentified as an alternative school, the mission of LMACS is broader than serving “at-risk” students. LMACS teachers are preparing students for college and for work. We are helping future citizens cope with difficult challenges in their personal lives as they learn to contribute to a democratic society. This is public education - not alternative schooling.

LMACS was chartered to support high school dropouts to become graduates - and to do it quickly. Many students at LMACS say that this is the first time in their lives that a school-based adult believes they have potential, but the teachers at LMACS have to meet the students where they are - a complicated task. On one end of the spectrum, there are students who arrive at LMACS with nearly enough credits to graduate from high school, but were never inspired to do so. On the other end are students who arrive at LMACS at a second-grade reading level and without knowledge of basic multiplication tables. To achieve the school’s mission, teachers ensure that each child has an advocate, and that students are prepared for future challenges. It is a school that defines success through emotional health and self-expression, as well as college readiness and test scores. The faculty holds students to high standards – standards that reflect academic achievement, progress towards 10 Ethical Values, and the ability to make a decision around educational and career options when they graduate. In order to support this mission, the school developed a school-wide academic and civic rubric for our learner expectations, approved by NEASC in 2005. (Appendix A)

II. Academic Program Success

CRITERIA	OBJECTIVE	MEASURE	STATUS
MCAS - performance	Students at the school demonstrate proficiency, or progress toward meeting proficiency targets on state standards, as measured by the Massachusetts Comprehensive Assessment System (MCAS) exams in all subject areas and at all grade levels tested for accountability purposes.	<p>1. The school shows an annual increase in its CPI score for the ELA MCAS in the aggregate.</p> <p>2. The school shows an annual increase in its CPI score for the mathematics MCAS in the aggregate.</p>	<p>1. ✓ The school showed an increase of 1.2 pts. in CPI score for the ELA MCAS from 86.3 in 2009-2010 to 87.5 in 2010-2011.</p> <p>2. ✓ The school showed an increase of 9 pts. in CPI score for the Math MCAS from 76.2 in 2009-2010 to 77.1 in 2010-2011.</p>
External assessments of student achievement	If externally developed assessments other than the MCAS are administered, student performance is strong and demonstrates improvement over time on those assessments.	1. The school shows an annual increase in the Accuplacer Test ELA and mathematics in the aggregate and for all statistically significant subgroups.	<p>1. ✓ In ELA, new students enrolling Sept. 2010, (n=11) on average showed a one (1) point increase in their Accuplacer scores between September 1st and June 1st. In math, new students showed, on average, an eleven (11) point increase in scores over that time.</p> <p>In ELA, graduating seniors (n=16) on average showed a sixteen (16) point increase in their Accuplacer scores between entry (dates vary) and graduation (2011). In math, graduates showed, on average, a twenty-nine (29) point increase in scores over that time.</p>

Curriculum	The school’s curriculum is documented, articulates the skills and concepts that all students must know and be able to do to meet state standards, is aligned horizontally and vertically, and supports opportunities for all students to master these skills and concepts.	1. Each year, all of the school’s teachers will document how each unit of instruction, in all courses, is aligned to the Common Core Standards. The Director and Assistant Director will review curriculum binders in all subject areas to ensure that LMACS curriculum is aligned to Common Core Standards. An LMACS curriculum rubric will be published on the school website and in the LMACS Annual Report	1. Making Progress LMACS is developing a process for aligning current curriculum from the existing Massachusetts Frameworks to the Common Core Standards. Presently a curriculum committee of 5 teachers is participating in the Massachusetts DESE Race to the Top Projects 5B and 5C workshops.
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Common School Performance Criteria

Curriculum:

At present the core curriculum of the Lowell Middlesex Academy Charter School is contained in content specific binders for English, mathematics, history and science and is aligned with the current Massachusetts Curriculum Frameworks. As Common Core Standards development proceeds, LMACS curriculum will be adapted to these new standards.

The charter school’s curriculum is consistently implemented around these frameworks in all subject areas. However, LMACS teachers are guided in their daily decisions for how they will plan for and deliver lessons by the six Learner Expectations that were developed in conjunction with the New England Association of School’s and Colleges in 2005.

See Appendix B for the 2010-2011 LMACS Course Offerings.

Instruction:

In addition to the school-wide rubric of Learner Expectations and Outcomes, all teachers use a Black Board Configuration with the following general structure:

- Do Now**
- Aim/Objective**
- Class Activity**
- Homework**

The Do Now signals the beginning of the class and is typically not more than five to ten minutes in length. Teachers use the Do Now to review previous content, ask students to write or reflect on what they already know, or to check for understanding from previous lessons. The Aim/Objective states the

objective or learning standard that the lesson will address, and the class activity describes the tasks that students and teachers will actually complete together during the lesson.

Program evaluation:

Program evaluation is a regular, on-going process at Lowell Middlesex Academy Charter School. The school completed a comprehensive analysis in 2009 of all of our programs, constituents, and policies as part of our ten-year reaccreditation with the New England Association of School and Colleges. We administered surveys of students, teachers and the Board of Trustees and formed committees around the following NEASC standards:

Committees for NEASC's Teaching and Learning Standards

Mission and Expectations
Curriculum
Assessment
Instruction

Committees for NEASC's Support Standards

Leadership & Organization
School Resources for Learning
Community Resources for Learning

We reported the results of all of the surveys and the findings of the seven Committees to the Association in November of 2009 and received notice of reaccreditation in the spring of 2010.

However, the evaluation of our programs is not limited to these formal site visits. The school hosted faculty, doctoral, and master's degree candidates from the Harvard Graduate School of Education this year. Each observer provided written feedback to the Executive and Assistant Director in the form of brief memos that contained candid feedback on curriculum, instruction, and school culture.

School culture:

The school was founded on ten Ethical Values:

Respect
Courage
Responsibility
Truthfulness
Justice
Unity
Agape
Achievement
Freedom
Peace

The social/emotional committee (an outgrowth of the NEASC committee) holds “success” assemblies focused on these values. Each assembly begins with a “Town Meeting” and honors students AND teachers who provide concrete examples of our Ethical Values through ideas, cultural activities or community service.

The school admits new students three times per year, at the start of the trimester in August, November, and March. Part of our orientation activities for new students includes activities meant to enhance new students’ understanding of the Ethical Values and the school culture at LMACS that is supported by these values.

The school’s policies and procedures are rooted in the Ethical Value of mutual Respect, and we have taken a conscious step to implement policies and procedures that operate in ways distinct from both traditional high schools and “No Excuses” charter schools. To this end, the school does not require uniforms of any kind, and has chosen to avoid the use of detentions, demerits, or in-school suspensions to monitor or deter student misbehavior.

Still, there are some basic “Non-Negotiables” around which the school refuses to bend and that may result in suspension or expulsion. LMACS uses an Ethical Review as part of a due process for students who violate our “Non-negotiables” and that can result in suspension or expulsion for repeated or egregious behavior. In addition, all students sign, with their Advisor, an “Agreement for Success” that outlines some of our expectations for behavior and also explains the following:

LMACS Non-Negotiable Rules and Policies are founded on respect:

Respect Yourself:

To be part of the school, you must be working toward your goals for achieving a successful and healthy future.

Respect Others: You must treat all fellow students, LMACS staff, MCC staff, and school visitors with courtesy and respect.

Respect Property:

You must show care for all areas of the school, the college, and others' personal belongings.

Diverse learners:

In addition to the policies and procedures outlined in the school’s Curriculum Accommodation Plan, the charter school has recently adopted several instructional technologies and strategies that

increase the school's capacity for identifying, meeting the instructional needs, and assessing the progress of our students.

The school continues to use the Achieve 3000 instructional software purchased during the 2007-08 academic year. This program is designed to quickly assess student reading levels and provide reading selections that are on-grade level. The program also provides assessments for reading comprehension so that teachers can monitor our students' progress.

In addition, the school offers coursework across a range of levels that meet our students' diverse needs. These course offerings include Dual Enrollment at Middlesex Community College, advanced coursework in English at the school, and Instructional Support for students with specific, individual needs.

Finally, all graduating students complete a Five-Year Plan, which is the culminating project for seniors and outlines the students' academic and career goals after they leave the charter school. This plan allows students with varying interests and abilities to showcase what they have learned, and are able to do, as well as what they have planned for their future.

Professional development:





The faculty and staff are engaged in professional development and on-going collaborations in several areas. Each year, the charter school supervises graduate students in Social Work programs who provide extremely valuable services to our students, and that contribute to our learning as well.

Staff regularly attends professional development seminars in specific content areas. Several teachers are participating in the three year Race to the Top project aligning the current Massachusetts Framework to the Common Core Curriculum.

All faculty and staff members participate weekly in Instructional Rounds during the school year. Instructional Rounds is a process whereby specific problems in teaching and learning are observed and analyzed in teams with a focus on applying school-wide solutions. We believe Instructional Rounds are an appropriate professional outgrowth resulting from our successful reaccreditation with NEASC and 15-Year Charter Renewal with the Department of Elementary and Secondary Education.

Finally, the school continues to provide time and support for teachers to develop their own content-specific expertise. Four teachers attended a series of workshops focused on student behavior and motivation held in Massachusetts and New Hampshire. Two teachers participated in programs sponsored by Middlesex Community College.

III. Organizational Viability

CRITERIA	OBJECTIVE	MEASURE	STATUS
Solvency and stability	<p>The school develops an annual budget that can be sustained by enrollment and is in support of student academic achievement.</p> <p>The school demonstrates a history of positive net assets, adequate cash flow to sustain operations and support the academic program, and consistently operates within budget.</p> <p>The school's annual independent audit is free of material or repeated findings.</p>	<p>1. The school's annual budget is sustained by its enrollment beginning with the pre-enrollment report.</p> <p>2. Each year, the school demonstrates a history of positive net assets, adequate cash flow to sustain operations as reported in financial statements. The budget supports the academic program and consistently operates within budget.</p> <p>3. There is an absence of material or repeated audit findings in annual audits by qualified independent auditor</p>	<p>1.  The annual budget is developed based on pre-enrollment projections. For the 2010 -2011 this budget was sustained by actual average enrollment of 111 students.</p> <p>2.  As evidenced by Certified Financial Statements the school consistently demonstrates positive financial results, supports academic programs and operates within budgets.</p> <p>3.  As evidenced by accountants Certified Financial Statements there have been no material findings reported.</p>
Enrollment	<p>The school implements the student recruitment, retention, and enrollment process intended in the charter, in the school's recruitment and retention plans, and as defined by statute and regulations.</p>	<p>1. Each year, the school's social workers will enroll at least 10% of dropouts reported to us by counselors in the sending districts.</p>	<p>1.  For the 2010-2011 school year, 23% of the new students enrolled were dropouts referred to LMACS social workers by sending districts.</p>

<p>Safety</p>	<p>The school establishes and maintains a physically safe environment for students and staff.</p> <p>The school establishes an environment free from harassment and discrimination for students and staff, and effectively addresses the social, emotional, and health needs of its students.</p>	<p>1. LMACS will have less than three incidents of violence (fighting, weapons) in the school per year as reported in discipline reports.</p> <p>2. Each year, LMACS will offer a series of student and teacher workshops. All students in the school will participate in the workshops and complete an evaluation report with at least 80% of the students reporting relevance of the topic to student's lives. Topics will include anti-bullying, harassment, depression, and substance abuse.</p> <p>3. Teachers actively monitor the school premises and report issues and survey students to determine their level of "feeling safe." At least 80% of students surveyed will report feeling safe in the school environment.</p>	<p>1. ✓ LMACS had less than three incidents of violence as reported in discipline reports during the 2010-2011 school year.</p> <p>2. ✓ Students and staff participated in several workshops, including anti bullying, depression awareness and prevention, harassment, gang violence, and substance use/abuse, motivation and goal setting.</p> <p>3. ✓ A student survey was conducted to assess student safety. 99% of students reported feeling safe in the school environment.</p>
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Common School Performance Criteria

Policy decisions:

There were no major policy decisions by the LMACS Board of Trustees in 2010-2011.

Amendments to the charter:

There were no amendments to the LMACS charter filed in 2010-2011.

Complaints:

There were no official complaints filed to the Board of Trustees in 2010-2011.

Oversight:

The executive director presents an oral and written report to the Board of Trustees at each meeting. Board members routinely ask questions and offer suggestions to the director. Additionally, a parent and a student sit on the Board and are asked to provide their unique perspectives. The student representative provides an oral report on student activities including academic and social/cultural events. A member of the Board of Trustees writes a formal evaluation of the executive director and reports to the full Board.

Trustees serve on self-study committees that evaluate school performance and present evidence at reviews and site-visits by the Department of ESE.

Board planning:

LMACS is an established Charter School that has been fortunate enough to have stable board oversight throughout its existence. Goals outside of the Accountability Plan include tracking graduates to ensure that LMACS is preparing students for real life after high school. To that end, Board members regularly inquire about the alumni list. Each year, a student updates the alumni list with current telephone numbers, email address, and residences. However, Board members understand the issues around the transient nature of an at-risk population.

Family satisfaction:

During evening parent meetings, parents or designated adults of our students continue to indicate high levels of overall satisfaction with the school and its programs for supporting students.

Three times during the 2010-2011 academic year, parents were sent surveys on three separate topics: ***Depression, Bullying, and Special Education***. Prior to conducting the surveys, parents were notified at parents meetings and by including notices in grade reports that are mailed home. As is often the case with our high risk population, parents are reluctant to complete surveys either sent to their homes with self-addressed return envelopes or posted to on the school's website.

Financial oversight:

LMACS budget development typically begins with the Executive Director chairing faculty discussions about curriculum and instruction priorities and needs. For example, for the 2010 budget year, teachers recommended to the Executive Director the renewal of *Achieve3000*, hiring an additional part time paraprofessional to staff a resource/student hall, and generally expanding the course offerings as a way to lower class size. With these recommendations, the Executive Director met with the finance sub-committee of the Board of Trustees to present a tentative (or draft) budget. At the full meeting of the trustees, the 2010 draft budget was presented for full Board action.

Recruitment and Retention Plan

I. Recruitment Plan

General Recruitment Activities	
List recruitment activities undertaken each year which apply to all students.	
<ul style="list-style-type: none"> - Advertise in all Middlesex Community College publications throughout the year; - Advertise by doing regular human interest stories on local radio shows; - Advertise/recruit at civic/social events throughout the region; - Encourage currently enrolled students to recruit friends; - Advertise by publishing human interest stories in the Lowell Sun; - Advertise in large storefront windows and using lawn signs; - Recruit students using LMACS.org website; - Meet regularly with school guidance counselors throughout the region. 	

(See data section for specific goals and strategies in each demographic group)

II. Retention Plan

Overall Student Retention Goal	
Annual goal for student retention (percentage):	Increase the retention rate from 55% to 60%
Retention Plan Goals and Strategies – List goals and strategies for retention activities	
Educational	<ul style="list-style-type: none"> • Curriculum designed to address huge gaps in students’ education. • Orientation and study skills classes to ensure success. • T1 program targeting students in their first term at LMACS. • MCAS and Accuplacer Prep classes to ensure academic success.
Social/Emotional	<ul style="list-style-type: none"> • Rigorous Health and Wellness curriculum to address students’ social and emotional needs. • Mental Health workshops lead by experts in their fields: Depression, anti-gang violence, substance abuse, bullying, etc. • After-school activities program.
Family Involvement	<ul style="list-style-type: none"> • Bi-weekly telephone calls to parents. • Evening parent workshops. • Timely parent notification to address absenteeism. • Social work intervention with families to address student academic, emotional, and behavioral issues.

Dissemination

The school has regularly led or participated in a number of projects aimed at disseminating our support for students who have not previously been successful in high school. For example:

1. Staff participated in a discussion of the role of Charter Schools in public education at UMass Lowell. This panel discussion followed a viewing of the documentary “Waiting for Superman”. Panel members included Lowell Public Schools, Westford Public Schools, LMACS, and UMass Lowell faculty.
2. LMACS staff and faculty presented the LMACS three phase curriculum model to the Project for School Innovation.
3. LMACS staff regularly appeared on local radio and submitted editorials to local newspapers commenting on issues of importance to the school community.

Selected Financial Reports

LOWELL MIDDLESEX ACADEMY CHARTER SCHOOL

Pre - Audit Draft Statement

Statements of Revenues, Expenses, and Changes in Net Assets

Years ended June 30, 2011 and 2010

	2011	2010
Operating revenues:		
Chapter 70 state tuition	\$ 1,444,525	\$ 1,392,553
In-kind contributions	\$ -	\$ -
Total operating revenues	\$ 1,444,525	\$ 1,392,553
Operating expenses:		
Salaries	\$ 1,070,467	\$ 914,190
Payroll taxes	\$ 13,318	\$ 9,197
Unemployment taxes	\$ -	\$ 67
Fringe benefits	\$ 140,643	\$ 103,777
Occupancy	\$ -	\$ 118,952
Contracted services	\$ 41,955	\$ 30,732
Telephone and utilities	\$ 47,693	\$ 23,518
Food service program	\$ 46,325	\$ 58,219
Staff development (note 4)	\$ 1,000	\$ 3,425
Office supplies and materials	\$ 29,069	\$ 27,583
Computer equipment and classroom furnishings	\$ 13,952	\$ 5,182
Postage and shipping	\$ 54	\$ 95
Maintenance and repairs	\$ 25,840	\$ 11,137
Insurance	\$ 15,183	\$ 19,143
Travel	\$ 512	\$ 5,425
Student transportation	\$ 3,140	\$ 1,515
Dues and subscriptions	\$ 6,418	\$ 13,223
Scholarships	\$ 3,820	\$ 1,500
Miscellaneous	\$ 5,019	\$ 8,087
Real Estate Taxes	\$ 8,737	
Depreciation	\$ 61,660	\$ 30,830
Base Building Improvements	\$ 78,600	
Allocated Service charge	\$ 83,567	\$ 78,848
Total operating expenses	\$ 1,696,971	\$ 1,464,645
Operating loss / gain	\$ (252,446)	\$ (72,092)
Nonoperating revenues/(expenses):		
State grants (note 10)	\$ 122,882	\$ 116,663
Private grants	\$ 13,252	\$ -
Interest Income	\$ 3,892	\$ -
Pollard Building Rental Income	\$ 188,679	\$ 47,744
Mortgage Interest	\$ (96,270)	\$ (16,263)
Federal School Lunch program	\$ 16,039	\$ 17,408
Nonoperating income	\$ 248,474	\$ 165,552
Increase / Decrease in net assets	\$ (3,972)	\$ 93,460
Net assets, beginning of year	\$ 837,782	\$ 744,322
Net assets, end of year	\$ 833,810	\$ 837,782

LOWELL MIDDLESEX ACADEMY CHARTER SCHOOL

Balance Sheet

Pre-Audit Draft Statement

June 30, 2011

(with comparative totals at June 30, 2010)

Assets	<u>Current Funds</u>		<u>2011</u>	<u>2010</u>
	<u>Unrestricted</u>	<u>Restricted</u>	<u>Total</u>	<u>Total</u>
Current assets				
Cash and cash equivalents	\$ 464,088	25,250	489,339	472,373
Accounts Receivable	-	-	-	-
Grants receivable	<u>-</u>	<u>6,226</u>	<u>6,226</u>	<u>13,714</u>
Total current assets	\$ <u>464,088</u>	<u>31,476</u>	<u>495,565</u>	<u>486,087</u>
Noncurrent assets				
Capital assets, net of accum depreciation	\$ 2,633,945	-	2,633,945	2,695,605
Other noncurrent assets	<u>293,892</u>	<u>-</u>	<u>293,892</u>	<u>290,000</u>
Total noncurrent assets	\$ <u>2,927,837</u>	<u>-</u>	<u>2,927,837</u>	<u>2,985,605</u>
Total assets	<u>3,391,926</u>	<u>31,476</u>	<u>3,423,402</u>	<u>3,471,692</u>
	=====	=====	=====	=====
Liabilities and Fund Balances				
Current liabilities				
Accounts Payable	\$ 4,475	1,728	6,203	13,048
Deferred grant revenue	<u>-</u>	<u>29,748</u>	<u>29,748</u>	<u>18,728</u>
Total current liabilities	\$ <u>4,475</u>	<u>31,476</u>	<u>35,951</u>	<u>31,776</u>
Noncurrent liabilities				
Loans Payable	\$ 2,553,640	-	2,553,640	2,602,135
Total noncurrent liabilities	\$ <u>2,553,640</u>	<u>-</u>	<u>2,553,640</u>	<u>2,602,135</u>
Total liabilities	<u>2,558,115</u>	<u>31,476</u>	<u>2,589,592</u>	<u>2,633,911</u>
	=====	=====	=====	=====
Fund balances	<u>833,810</u>	<u>-</u>	<u>833,810</u>	<u>837,781</u>
Total liabilities and fund balances	\$ <u>3,391,926</u>	<u>31,476</u>	<u>3,423,402</u>	<u>3,471,692</u>
	=====	=====	=====	=====

LOWELL MIDDLESEX ACADEMY CHARTER SCHOOL

Statement of Changes in fund Balances
 Pre-Audit Draft Statement
 Year ended June 30, 2011
 (with comparative totals at June 30, 2010)

	Current Funds		2011	2010
	<u>Unrestricted</u>	<u>Restricted</u>	<u>Total</u>	<u>Total</u>
Revenues and other additions:				
Charter School tuition	\$ 1,444,525		1,444,525	1,392,553
Government grants and contracts		122,882	122,882	114,291
Rental Income	188,679		188,679	47,744
Private Grants	500	12,752	13,252	
Interest Income	3,892		3,892	
School Lunch Program	16,039	-	16,039	17,408
Total revenues and other additions	<u>1,653,635</u>	<u>135,634</u>	<u>1,789,269</u>	<u>1,571,996</u>
Expenditures and other deductions:				
Education and general expenditures	1,302,553	-	1,302,553	1,308,742
Private Grants	-	12,752	12,752	
Pollard Building Operation	118,524		118,524	8,411
Mortgage Interest Payments	96,270		96,270	16,263
Depreciation	61,660		61,660	
Base Building Improvements	78,600		78,600	
Government grants and contracts		122,882	122,882	116,663
Total expenditures and other deductions	<u>1,657,607</u>	<u>135,634</u>	<u>1,793,241</u>	<u>1,450,079</u>
Net increase/ decrease in fund balances	(3,972)	-	(3,972)	93,459
Fund balances at beginning of year	<u>837,782</u>	-	<u>837,782</u>	<u>744,322</u>
Fund balances at end of year	\$ <u>833,810</u>	\$ <u>-</u>	<u>833,810</u>	<u>837,781</u>

Fiscal Year 2012 approved school budget

LOWELL MIDDLESEX ACADEMY CHARTER SCHOOL
Fiscal Year 2012
Interim Spending Plan

TOTALS

Revenue

Tuition - Chapter 70	\$ 1,386,305
DOE Title I Grant	\$ 54,862
DOE Lunch Reimbursement	\$ 17,000
Entitlement Grants	\$ 64,481
TJX Grant	\$ 15,000
Building Operations Rental Income	<u>\$ 180,000</u>

Total Revenue \$ 1,717,648

School Operations Expenses

Personnel Costs

Full-time Teachers/Counselors	\$ 783,665
Full-time management staff contract	\$ 346,913
Part-time Faculty/Staff	<u>\$ 77,610</u>
Subtotal Personnel Costs	\$ 1,208,188

Direct Student Costs

Mortgage Allocation (40%)	\$ 57,906
Other Contracted Services	\$ 35,867
Telephone and Utilities	\$ 20,590
Food Service Program	\$ 53,800
Office Supplies and Student Materials	\$ 29,490
Postage	\$ 450
Maintenance and Repairs	\$ 24,330
Insurance	\$ 11,766
Staff Travel / Professional Development	\$ 9,000
Student Travel	\$ 2,500
Dues and Subscriptions	\$ 6,418
TJX Scholarships	\$ 3,000
LMACS Scholarships	\$ 2,250
Miscellaneous(Scholarships,Student Activities,Printing,advertising)	<u>\$ 8,315</u>
Subtotal Direct Student Costs	\$ 265,681

Total School Operations Expenses \$ 1,473,869

Pollard Building Operations Expenses

Mortgage Allocation (60%)	\$ 86,859
---------------------------	-----------

Building Manager	\$	60,127
Sprinkler Maintenance	\$	300
Elevator Maintenance	\$	3,940
Reserve for Repairs	\$	5,000
Accounting/Auditing	\$	3,000
Water/Sewer	\$	2,500
Insurance	\$	6,920
Utilities	\$	30,000
Real Estate Taxes	\$	9,000
Market Rent Appraisal	\$	<u>1,400</u>
Total Building Operations Expenses	\$	209,046
Total Combined Operating Expenses	\$	1,682,915

Lowell Middlesex Academy Charter School Funders

Foundations

The TJX Foundation, Inc.	\$	15,000.00
Parker Foundation	\$	10,000.00
The Mifflin Memorial Fund	\$	10,000.00
Cubist Pharmaceutical	\$	500.00

Fiscal Year 2012 Capital Plan

Last year, on March 2, 2010, LMACS purchased the Pollard Building (so called) at 55-67 Middle Street in Lowell for \$2.6million. This is the same location that the school had been leasing for the past twelve years. To fund the acquisition of the building including facility improvements the school borrowed \$2.9million through the office of MassDevelopment. Since gaining ownership of the building the school has engaged a consultant and has developed a list of base building improvements. These improvements address life safety and code issues, building envelope and infrastructure as well as improvements to educational and teaching space. Some of these projects were completed in FY11, some will be complete in FY12 and others will need to be scheduled as funding permits.

FY11 projects:

Roof masonry	\$4,800
Roof repair	\$9,800
Fire Protection upgrades -bldg. core	\$57,700
Water supply upgrade (for fire protection)	<u>\$23,000</u>
Total FY11	\$95,300

FY12 projects (estimated completion dates):

Fire Alarm system upgrades (8/1/11)	\$85,000
Outside Wall masonry (8/15/11)	\$10,100
Classroom and building access 1 st floor	\$172,000
-(renovations, ADA and life safety improvements (8/21/11))	
Basement HVAC improvements (11/15/11)	<u>\$35,000</u>
Total FY12	\$302,100

In addition to the above projects LMACS plans to continue to upgrade and improve the facility. These projects include additional renovations to the HVAC, fire protection, lighting, signage, educational space and elevator improvements. These will be scheduled and implemented as funding permits.

To pay for the renovations the school has established a capital improvements escrow account in the amount of \$290,000 from the proceeds of the loan. The FY11 projects will be charged against this account leaving a balance as of June 30, 2011 of \$194,700.

Also, in the fiscal year 2010 Financial Statements, as a designation of unrestricted net assets, the school established a fund for technology upgrades and replacements, classroom furnishings and equipment, and classroom renovations in the amount of \$454,000.

Data Section

INSTRUCTIONAL TIME:	
Total number of instructional days for the 2010-11 school year	180
First and last day of the 2010-11 school year	Aug 31-June 23
Length of school day (please note if schedule varies throughout the week or the year)	M-Th 9am-3:30pm Friday 9am-12pm

STUDENT ENROLLMENT INFORMATION:	
Number of students who completed the 2009-10 school year but did not reenroll for the 2010-11 school year (excluding graduates)	26
Total number of students enrolled as of October 1, 2010	108
Total number of students who enrolled during the 2010-11 school year after October 1, 2010	43
Total number of students who left during the 2010-11 school year after October 1, 2010	55
Total number of students enrolled as of the June 30, 2011 SIMS submission	96
Number of students who graduated at the end of the 2010-11 school year	16
Number of students on the waitlist as of June 30, 2011	0

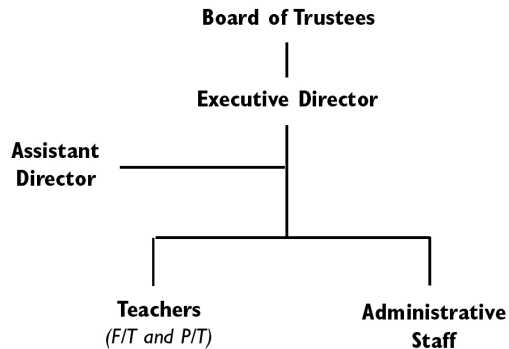
In addition to completing the table above, please provide a summary of the reasons for all student departures (excluding graduation).

Reason for Departure	Number of Students
Number of students expelled	2
Number of students transferred – In state public	7
Number of students transferred – In state private	1
Number of students transferred – Out of state (public or private)	2
Number of students withdrawn – Pursuing GED	43
Number of students withdrawn – Entered Job Corps	2
Number of students withdrawn – Due to employment	2
Number of students withdrawn – Plans unknown	24

STUDENT DEMOGRAPHIC AND SUBGROUP INFORMATION (for students enrolled as of the June 2011 SIMS submission)		
Race/Ethnicity	# of students	% of entire student body
African-American	4	4%
Asian	10	10%
Hispanic	29	31%
Native American	2	2%
White	49	51%
Native Hawaiian, Pacific Islander	0	0%
Multi-race, non-Hispanic	2	2%
Special education	21	22%
Limited English proficient	0	0%
Low income	75	78%

ADMINISTRATIVE ROSTER FOR THE 2010-11 SCHOOL YEAR			
Title	Brief Job Description	Start date	End date (if no longer employed at the school)
Margaret McDevitt, Executive Director	The Executive Director is responsible for oversight of all personnel, programs, and activities of the Lowell Middlesex Academy Charter School	7/1/2004	
Nancy Arseneaux, Assistant Director	Under the direction of the Executive Director of the Lowell Middlesex Academy Charter School, the Assistant Director is responsible for providing leadership, management, and coordination for the school.	7/1/2008	

Organizational Chart



TEACHERS AND STAFF ATTRITION FOR THE 2010-11 SCHOOL YEAR			
	Number as of the last day of the 2010-11 school year	Departures during the 2010-11 school year	Departures at the end of the school year
Teachers	15	0	1
Other Staff	4	0	0

REASONS FOR TEACHER DEPARTURES		
	Reasons for departures during the 2010-11 school year	Reasons for departures at the end of the school year
Teachers		Took another position

BOARD MEMBERS FOR THE 2010-11 SCHOOL YEAR

Name	Position on the Board	Committee affiliation(s)	Area of expertise, and/or additional role at school (parent, staff member etc.)	- Number of terms served; - Length of each term, including date of election and expiration
Cowan, Carole	President		Academic	10/5/94-6/30/95 7/1/95-6/30/97 7/1/97-6/30/99 7/1/99-6/30/01 7/1/01-6/30/03 7/1/03-6/30/05 7/1/05-6/30/07 7/1/07-6/30/09 7/1/09-9/29/14
Sheehy, Molly	Clerk	Personnel Committee Finance Committee Nominating Committee	Academic	10/5/94-6/30/95 7/1/95-6/30/97 7/1/97-6/30/99 7/1/99-6/30/01 7/1/01-6/30/03 7/1/03-6/30/05 7/1/05-6/30/07 7/1/07-6/30/09 7/1/09-9/29/14
Linnehan Jr., James	Treasurer	Real Estate Committee Finance Committee	Administration and Finance	10/5/94-6/30/95 7/1/95-6/30/97 7/1/97-6/30/99 7/1/99-6/30/01 7/1/01-6/30/03 7/1/03-6/30/05 7/1/05-6/30/07 7/1/07-6/30/09 7/1/09-9/29/14
Carvalho, Frank	Trustee	Real Estate Committee	Business	9/12/01-6/30/03 7/1/03-6/30/05 7/1/05-6/30/07 7/1/07-6/30/09 7/1/09-9/29/14
Cherubino, Robert	Trustee		Student	10/4/10-6/6/11
Cooney, James	Trustee	Real Estate Committee	Business	7/1/09-9/29/14
Cunha, Maria	Trustee	Personnel Committee Nominating Committee	Community	7/1/03-6/30/05 7/1/05-6/30/07 7/1/07-6/30/09 7/1/09-9/29/14

Dauwer, Phyllis	Trustee		Parent	10/4/10-6/6/11
Iem, Steven	Trustee	Finance Committee	Business	3/23/11-9/29/14
Khoeun, Samkhann	Trustee		Academic	2/7/96-6/30/97 7/1/97-6/30/99 7/1/99-6/30/01 7/1/01-6/30/02 9/17/07-6/30/09 7/1/09-9/29/14
Lopez, Maria	Trustee	Personnel Committee Finance Committee Nominating Committee	Community	9/17/07-6/30/09 7/1/09-9/29/14
Meehan, Michelle	Trustee	Real Estate Committee	Community	7/1/03-6/30/05 7/1/05-6/30/07 7/1/07-6/30/09 7/1/09-9/29/14
Mitchell, Kent	Trustee		Academic	11/11/00-6/30/01 7/1/01-6/30/03 7/1/03-6/30/05 7/1/05-6/30/07 7/1/07-6/30/09 7/1/09-9/29/14
Okafor, Cecelia	Trustee		Community	7/1/03-6/30/05 7/1/05-6/30/07 7/1/07-6/30/09 7/1/09-11/29/10

Recruitment Plan – Goals and Strategies

List goals and strategies for recruitment activities for each demographic group.

<p>Demographic Group: A. Special education students</p>	<ul style="list-style-type: none"> - LMACS special education teachers attend city-wide SPED PAC meetings to attract parent interest. - Promote LMACS as actively seeking/able to meet the needs of SPED students in all advertisements. - Participate in informational/awareness discussions with local districts.
<p>Demographic Group: B. Limited English-proficient students</p>	<ul style="list-style-type: none"> - Board members assist in recruitment in all ethnic groups throughout the region. Board members represent the Spanish, Portuguese, and Khmer speaking communities. They will promote LMACS at social, civil and religious events during discussions and by distributing printed materials. - Trustees will advertise LMACS in our language groups on radio and local cable TV.
<p>Demographic Group: C. Students eligible for free lunch</p>	<ul style="list-style-type: none"> - 51.9% of LMACS students are eligible for free lunch. - We continue to post flyers at food banks, housing projects, and local homeless shelters.
<p>Demographic Group: D. Students eligible for reduced price lunch</p>	<ul style="list-style-type: none"> - 13% of LMACS students are eligible for reduced lunch. - We continue to post flyers at food banks, housing projects, and local homeless shelters.
<p>Demographic Group: E. Students who are sub-proficient</p>	<ul style="list-style-type: none"> - Presentations highlight our remedial services including required MCAS Prep classes in ELA, math and biology. - LMACS curriculum is taught using a three phase instructional model that provides scaffolding in all subject areas.
<p>Demographic Group: F. Students at risk of dropping out of school</p>	<ul style="list-style-type: none"> - The school targets students who are at risk of dropping out. All our efforts are to support our mission of serving an at-risk population.
<p>Demographic Group: G. Students who have dropped out of school</p>	<ul style="list-style-type: none"> - The school targets students who have dropped out. All our efforts are to support our mission of serving an at-risk population. - We meet regularly with representatives from: LPD, Juvenile Court, DSS, DYS, Youth Groups.

<p>Demographic Group(s):</p> <p>H. Other subgroups of students who should be targeted to eliminate the achievement gap</p>	<ul style="list-style-type: none">- Students from typically underserved populations are our target population. We meet regularly with groups serving our Southeast Asian, Hispanic, and black area youth.- LMACS is 51% white, 30% Hispanic, Asian 10%, and 4% black.- 87.5% of students report that English is their first language.- 12.5% of students report that English is their second language.
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Appendix A

LEARNER EXPECTATION #1: Students will be able to read critically and analytically.

LEARNER OUTCOME #1: Identify and discuss the main idea in reading selections.

1. Cannot select main idea
2. Can partially select main idea
3. Can select the main idea and restate with clarity
4. Can select the main idea all of the time and make connections with other reading selections

LEARNER OUTCOME #2: Use advanced vocabulary from reading selections in ways that show understanding.

1. Has difficulty comprehending advanced vocabulary
2. Shows some comprehension of advanced vocabulary
3. Can use advanced vocabulary in limited ways
4. Uses advanced vocabulary to discuss reading selection

LEARNER OUTCOME #3: Determine a point of view, bias, values or intent underlying presented material.

1. Takes reading selection at face value without interpretation
2. Recognizes different points of view in a selection
3. Can articulate the background factors influencing point of view or intended consequences in a selection
4. Can articulate other or opposing points of view influencing a selection

LEARNER EXPECTATION #2: Students will be able to communicate effectively in writing and orally to a variety of audiences.

LEARNER OUTCOME #1: Use correct grammatical conventions including sentence and paragraph structure, punctuation, capitalization, and parts of speech.

1. Writing and oral presentations include basic errors of grammar
2. Makes few grammatical errors but with simple language and structure
3. Usually uses correct grammar and varies sentence structure to improve presentation
4. Consistently engages an audience by varying parts of speech and word choice

LEARNER OUTCOME #2: Present oral and written presentations in a way that suits the purpose of the writer and addresses the audience appropriately.

1. Material lacks clear focus, logically related ideas, and adequate details
2. Material reflects some clarity of purpose with some supporting details
3. Organizes written or spoken material with focus, related ideas, and adequate details.
4. Engages audience with clear focus, logically related ideas, and supporting details.

LEARNER EXPECTATION #3: Students will be able to problem solve in a variety of circumstances.

LEARNER OUTCOME #1: Organize information from a variety of sources.

1. Cannot identify useful sources
2. Can begin to identify and gather useful information

3. Can recognize patterns in information gathered from sources
4. Can categorize relevant information for optimal use

LEARNER OUTCOME #2: Interpret, analyze and evaluate information.

1. Cannot make use of information
2. Can interpret or paraphrase a problem but cannot structure a solution
3. Can analyze the problem and structure a solution without evaluation
4. Can evaluate the problem and potential solutions

LEARNER EXPECTATION #4: Students will be able to use technology as a tool to gather, analyze and present information.

LEARNER OUTCOME #1: Use Microsoft Word, Excel, and Power Point effectively.

1. Demonstrates some basic keyboarding and word processing for school reports
2. Can effectively and efficiently use Microsoft word
3. Can demonstrate basic functions and use of Excel and Power Point
4. Can effectively use Excel and Power Point to organize and present information

LEARNER OUTCOME #2: Utilize the Internet for gathering and selecting sources of information.

1. Demonstrates basic knowledge of the Internet
2. Is conversant with basic data gathering websites
3. Can conduct a search using websites
4. Can evaluate the usefulness of information found on websites

LEARNER EXPECTATION #5: Students will be able to demonstrate a clear awareness of the rights and responsibilities of a community member

LEARNER OUTCOME #1: Understands the school's Ethical Values: Respect, Courage, Responsibility, Truthfulness, Justice, Unity, Agape, Achievement, Freedom, and Peace and how each relates to the individual's rights and responsibilities as a community member.

1. Student is an uncooperative community member at times
2. Usually treats others with respect and accepts responsibility for their behavior
3. Treats others with respect, accepts responsibility for own behavior, and participates in some school activities in a meaningful way
4. Student is a school leader who understands and can model the school's Ethical Values

LEARNER EXPECTATION #6: Students will be able to demonstrate an understanding and knowledge of a career or educational option in order to develop a plan for the future

LEARNER OUTCOME #1: Complete an internship successfully.

1. Has not demonstrated success at the worksite
2. Has satisfactorily completed an internship
3. Has completed internship with distinction
4. Has completed a challenging internship that has led to a paying job at the site

LEARNER OUTCOME #2: Reflect on and evaluate past choices.

1. Is hesitant to identify past choices

2. Can identify past choices
3. Recognize the impact of past choices
4. Evaluate past choices in order to make new plans

LEARNER OUTCOME #3: Set goals for the future.

1. Five year plan is vague
2. Five year plan contains some goals and strategies for achieving them
3. Five year plan contains a clearly articulated pathway and goals
4. Student completed an excellent five-year plan, which has high expectations for the future

Appendix B

2010-2011 Course Offerings

English Language Arts

Literature and Composition
Advanced English
Creative Writing
Keeping it Reel
College English
Memoir
MCAS ELA

History and Social Science

World History
US History
Ethics
Senior Seminar
Senior Civics
Legacy

Health and Wellness

Life Choices
Healthy Lifestyles
Man in Society
Women in Society
Physical Education

Art

Studio Art
Advanced Studio Art
Honors Studio Art
Integrated Art

Mathematics

Pre-Algebra
Algebra I
Algebra II
MCAS Math
Financial Literacy
Fundamentals of Algebra
Geometry
Number Sense
Problem Solving

Science and Technology

Biology
MCAS Biology
CSI I
CSI II
Technology

Career

Internship
Public Speaking
Right Start

Student Support

Study Skills
Instructional Support Foundations
Instructional Support ELA
Instructional Support Practice
Practice