

**Charter School Facilities Support Unit Expansion Project (CSU)**

**CSP National Dissemination Grants CFDA 84.282T**

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## **Charter School Facilities Support Unit Expansion Project (CSU)**

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#### **EXECUTIVE SUMMARY**

Building Hope, a nonprofit mission-driven Community Development Financial Institution (CDFI) located in Washington, D.C., respectfully requests \$550,025 from the Charter Schools Program – National Dissemination Grants. For 15 years, Building Hope has worked to close the education achievement gap by giving students access to high quality public charter schools and providing those schools with technical assistance and facilities solutions. The National Dissemination Grants program offers a unique opportunity for Building Hope to expand its highly successful Charter School Support Unit, which has been in operation in Florida since 2012.

Building Hope has been a leader in charter school financing for over a decade. Started in 2003, we have provided over \$305 million in investments to over 245 schools. Our direct investments have leveraged over \$1.36 billion in charter school construction and created opportunities for over 88,609, predominantly low-income, minority students to receive a quality education. For the past decade, Building Hope has been providing charter school leaders technical assistance, and offering free, objective advice and help with various business planning and real estate related issues.

In 2012, the Florida Department of Education was one of only two states that were awarded a federal CSP grant to support charter schools. In its application, Florida proposed creating a Charter Support Unit (“FCSU”) to provide short-term, intensive and

targeted technical support for new charter schools and was looking for a strong partner to deliver on this support. Building Hope was selected by the FL DOE to provide this service to schools throughout the state. This was a hugely successful program which offered technical assistance support to over 35 percent of new Florida public charter schools.

Unfortunately, following the 2015-2016 school year, when the DOE CSP grant expired, state funding for the FCSU was not available to continue the program, due to budgetary constraints. Building Hope and others, however, felt that the service was invaluable to Florida's charters and so Building Hope continued to offer the services at no cost to schools during the 2016-2017 school year. In the 2018 legislative session, after a strong advocacy effort by Florida Charter Schools and supporters, the state of Florida included funding for the FCSU in its state appropriations bill due to the success of the initial pilot program.

The FCSU has provided support to over a quarter of all charter schools in the state since 2012. The data collected demonstrated that over 35 percent of new charter schools in Florida took advantage of the direct services provided by the FCSU. The wealth of information and services provided by the FCSU can be found on the FCSU's website: <http://www.flcsu.org>. A quick perusal of the website provides a good overview of the breadth of information provided by FCSU.

This grant application seeks to expand on the success of the FCSU by creating a new Charter Support Unit, referred herein as the Charter Support Unit Expansion (“CSU-Expansion”) for charter school leaders in three new, previously unserved states--New York, Washington, D.C., and Texas--in addition to rural charter schools, generally, across the 45 states and Washington, D.C. that have authorized charter school programs.

The CSU-Expansion project will essentially provide the same services and information provided by the FCSU, except that it will be focused on the new geographic areas and on rural areas in general. In particular, The CSU-Expansion project will develop a website to hold informative content for the target charter school leaders—including a wide range of webinars, peer information forums and best-practice white papers. The project will also have a staffed help-desk to respond to issues quickly from charter leaders located in the target regions. And finally, the CSU-Expansion project will provide one-on-one consultations with a range of Building Hope’s charter experts, as needed and based upon the particular issue at hand. The CSU-Expansion will also collect and analyze the volume and nature of inquiries, so as to better tailor content going forward and to inform support organizations who advocate on behalf of Charter Schools.

Building Hope is an experienced technical assistance provider. Our work directly working with charter schools these past 15 years, including its work at the FCSU demonstrates a real need for this kind of effort. There is no question that access to facilities and facilities financing is the greatest challenge charter schools face. We also believe there is room and a need for multiple efforts to combat this challenge.

As a member of the Charter School Lender’s Coalition (CSLC) we are aware of, and fully support, the National Alliance for Public Charter Schools’ (NAPCS) approach to this National Dissemination Grant opportunity. However, the CSU-Expansion project will complement the NAPCS approach—which cover facilities issues generally. The CSU-Expansion will provide direct, intensive, one-on-one consultation to charter leaders. The CSU-Expansion is designed to build on the proven success of Building Hope’s Florida program and intensively provide services to school leaders in New York, Washington, D.C., Texas, and in rural jurisdictions, and use those results to develop and disseminate best practices in supporting charter schools in accessing and financing facilities.

**Responding to Absolute Priority 2 - Improving Charter School Access to Facilities and Facility Financing.**

Building Hope was founded in 2003 with the vision that all children should have access to a quality K-12 education and an equal opportunity to achieve success in life. To achieve this vision, Building Hope set out to tackle one of the key barriers to charter school growth: identifying and financing viable facilities for schools. With this award, Building Hope will build on the success of our programs that speak directly to the Absolute Priority of improving charter school access to facilities and facility financing.

Through the CSU-Expansion project proposed herein, Building Hope will provide critical support to rural charter schools and schools in New York, Washington, D.C. and Texas. Based on the success of our FCSU, we will achieve measurable results with this award

and demonstrate a replicable model that can support charter schools nationally. Specifically, Building Hope will employ a marketing strategy to promote the CSU-Expansion services – Website, Charter Support Hotline, Webinar Series, Consultations – to charter school leaders in our target markets, but also one that shares the best-practices of the program to a much broader audience.

**Responding to Competitive Preference Priority 2 - Empowering Families and Individuals To Choose a High-Quality Education That Meets Their Unique Needs**

The CSU-Expansion seeks to build on Building Hope’s work towards its mission of ensuring that every child have access to a high-quality K-12 education. Many barriers exist for students to gain access to educational choice, and those obstacles are compounded for certain subgroups. Building Hope has identified a few key barriers in accordance with GEPA Section 427 (attached), and specifically seeks to address barriers in response to Competitive Preference Priority 2. Building Hope will use grant funds to ensure the programs and services provided by the CSU-Expansion, create greater opportunities for students with disabilities, English language learners and students in communities served by rural local education agencies.

Nationally, there are nearly 1,000 charter schools serving students in rural America, only about eleven percent of these schools are in remote rural areas. Rural students, like their urban counterparts, are more likely to live in poverty and only 27 percent of rural high school graduates go on to post-secondary studies.<sup>1</sup> A recent study of rural education

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[https://bellwethereducation.org/sites/default/files/Bellwether\\_A\\_New\\_Frontier\\_Jan\\_2014.pdf](https://bellwethereducation.org/sites/default/files/Bellwether_A_New_Frontier_Jan_2014.pdf)

noted that the National Center for Education Statistics predicts that Idaho alone will have 22,000 new school-aged students to serve in just the next four years.<sup>2</sup> The need for high-quality charter schools in rural jurisdictions is imminent. The CSU Expansion project is targeting rural charter schools by developing content and services that speak directly to school leaders serving rural communities.

At Building Hope, we also appreciate the challenges many charter leaders face in serving students with disabilities and ELL students. Often charter leaders are forced to outsource services that can support these student subgroups. Building Hope's team is experienced in helping school leaders navigate these instructional challenges. Through the CSU-Expansion Website, Webinar Series and printed publications, Building Hope will share its best-practices and cost-effective strategies that schools can employ to address facility and operational improvements that can increase accessibility for ELL and disabled students.

## **SELECTION CRITERIA**

### **(A) SIGNIFICANCE OF THE PROPOSED PROJECT (35 points).**

Access to facilities is a major obstacle for charter schools, especially those in rural America. Instructional space is scarce, leading many schools to make compromises to co-locate in other buildings like retail space or churches. Additionally, charter schools in most states do not have access to per-pupil facilities allocations like their traditional public-school peers. Unlike traditional public schools, charters in most states are denied

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<sup>2</sup> [https://bellwethereducation.org/sites/default/files/Bellwether\\_BuildingExcellence\\_FINAL-WEB.pdf](https://bellwethereducation.org/sites/default/files/Bellwether_BuildingExcellence_FINAL-WEB.pdf)

access to local bonds and levies, making construction and renovation cost-prohibitive. Historically, charters have proven to do a lot more with less, using operational funds to support facilities while their traditional public-school counterparts have access to facilities at no cost to their budget.

Regardless of how financially sound they are or if they have additional support from private philanthropy, charters typically have a hard time securing mortgages, saving enough capital for 100 percent of the cost of a facility and frankly, maneuvering real estate as their mission is about educating students. Building Hope has a proven track record of supporting charter school leaders in being disciplined and strategic and doing it all at a fraction of the cost of a traditional school district. The CSU-Expansion Project proposed herein, will enable Building Hope to support more charter leaders and provide a model for other states and entities to replicate.

**(1) The potential for generalizing from the findings or results of the proposed project.**

A major goal of CSU-Expansion project is to analyze and collect information on the most pressing facilities needs of charter schools. In providing technical assistance to charters in our key markets for the past fifteen years, Building Hope knows all too well that a charter school leader may seek out support on one aspect of a facility plan. But the barriers may be numerous and relate to policy, governance or myriad other issues.

Through the support hotline, consultations, and website, the CSU-Expansion will be able to collect data and provide recommendations. As is the case with all of Building Hope's technical assistance programs, including the FCSU, we also use these findings to constantly evaluate our programming so that our team can adjust resources and services accordingly.

**(2) The extent to which the results of the proposed project are to be disseminated in ways that will enable others to use the information or strategies.**

As described in greater detail in section (B)(3) of this proposal the primary mechanism to disseminate information on this project will be the CSU-Expansion Website. All information pertinent to the project will be housed on this portal for anyone to access. Building Hope will also employ a marketing strategy that not only informs charter school leaders in our target markets that the CSU is a resource available to them, but also one that highlights the best-practices of the program to a much broader audience. A few activities specific to disseminating information include but are not limited to:

- Presenting and marketing of CSU resources at state and National Charter School Conferences;
- Converting critical web content and resources to publication for distribution;
- Preparation of case studies focused the challenges and resolutions of charter schools served by the CSU;
- Conducting webinars with national and state associations, authorizers, etc. to discuss the work of the CSU;
- Preparing presentations and developing training manuals specific to the needs of

charters, especially those in rural jurisdictions; and

- Presenting the analysis of the Charter Support Hotline findings on the most pressing facility issues charter schools face.

**(3) The likelihood that the proposed project will result in system change or improvement.**

It cannot be understated, access to facilities and facilities financing is arguably the largest and most persistent obstacle that charter schools face. While state policy is a major contributing factor to this problem, the lack of resources specific to facilities, real estate acumen by school leaders and access to viable space are equally to blame. Charter school leaders need support from experts in real estate, finance, operations and governance.

Washington, D.C. and Texas consistently are ranked high by the National Alliance for Public Charter Schools (NAPCS) in terms of providing “equitable access to capital funding and facilities.” In fact, both jurisdictions score 12 out of 16 points on the NAPCS ranking.<sup>3</sup> New York only received a 8 out of 16 points and is arguably one of the least equitable in terms of providing operational and facilities support. The Center for Education Reform (CER) consistently ranks Washington, D.C.’s charter law the best in the nation and awards 4 out of 5 possible points for allowing access to “facility funds and financing.”<sup>4</sup> Yet, despite considerably greater access to facilities financing codified in

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<sup>3</sup> <https://www.publiccharters.org/our-work/charter-law-database/states/texas>

<sup>4</sup> [https://www.edreform.com/wp-content/uploads/2018/03/CER\\_National-Charter-School-Law-Rankings-and-Scorecard-2018\\_screen\\_3-21-18.pdf](https://www.edreform.com/wp-content/uploads/2018/03/CER_National-Charter-School-Law-Rankings-and-Scorecard-2018_screen_3-21-18.pdf)

law, charter schools in New York, Washington, D.C. and Texas face significant challenges. In fact, addressing these challenges led to Building Hope's creation of a technical assistance program 10 years ago. To date, Building Hope has supported over 50 charter schools in DC alone with technical assistance.

Through the CSU-Expansion Project, Building Hope knows that the data collected and disseminated will result in systemic change and improvement for the sector. Call logs, case studies and an analysis of the most pressing facility issues facing charter schools today will inform state lawmakers, authorizers and advocates in new ways that have never been addressed before. The data collected from the early years of the FCSU, was critical in garnering support at the Florida statehouse which has resulting in continued appropriations for the program. We believe that the data to be collected at the CSU-Expansion will similarly result in greater awareness of the challenges faced by Charter Schools in addressing their facility needs and highlight the value of the CSU-Expansion.

**(4) The extent to which the proposed project is likely to build local capacity to provide, improve, or expand services that address the needs of the target population.**

Building Hope's partnership with the Florida Department of Education to create and operate the FCSU demonstrates the potential for replication elsewhere. It was clear in 2012 that Florida's charter schools needed a centralized technical assistance resource. Local and county school boards are the only authorizers permitted in the state and in most cases remain hostile to charter schools. The two state charter associations were fledgling

or fighting for survival. The Florida Department of Education recognized that it needed to fill that void but needed experts to provide the technical assistance.

The partnership with Building Hope to operate the FCSU remains a huge success. With the original CSP funds expended after the 2015-2016 school year, Building Hope continued to provide resources to keep the project running. In recognition of its success and importance, the FCSU was appropriated funds in the 2018 legislative session. The FCSU has provided support to nearly 175 schools over the past six years, with 35 percent of those schools being within their first charter contract year.

It is Building Hope's goal to see the CSU-Expansion project grow over time. While the project proposed herein is a two-year start-up grant, Building Hope is confident that its partnerships with authorizers, state and federal entities and state and federal support organizations will lead to the continued funding of the program after the initial grant period.

**(B) QUALITY OF THE PROJECT DESIGN (30 points).**

**(1) The extent to which the proposed project demonstrates a rationale (as defined in 34 CFR 77.1(c):**

The CSU-Expansion is based on a logic model that builds upon Building Hope's fifteen-year history of providing critical services to charter school leaders. Building Hope will use this award to replicate our successful FCSU model and demonstrate that intensively

providing services to charter schools can improve their access to facilities and facility financing and empower families and individuals to choose a high-quality education.

Building Hope’s Logic Model, which outlines the inputs/resources, timelines, outputs and outcomes of the CSU-Expansion project are outlined in the table below.

<b>Charter Facilities Support Unit Expansion (CSU-Expansion)</b>				
<b>Logic Model</b>				
<b>Absolute Priority 2-</b> Improving Charter School Access to Facilities and Facility Financing.				
<b>Competitive Preference Priority 2 -</b> Empowering Families and Individuals to choose a High-Quality Education That Meets Their Unique Needs.				
<b>(i) Inputs and Resources</b>	<b>(ii) Project Activities &amp; Timeline</b>	<b>(iii) Project Outputs</b>	<b>(iv) Project Outcomes</b>	
			<b>Short -Term</b>	<b>Long -Term</b>
\$650,000 from CSP National Dissemination Grant program	Development of CSU Website (estimated completion in Q1 of project)	CSU Website	Support provided to at least 180 schools within first two years. At least 100 rural across multiple states; 30 NY; 30 DC; 20 TX.	Expanded opportunities for families and students to choose a high-quality education.
Building Hope's experience financing charter school facilities and providing schools with technical assistance	Launch and Market Charter Support Hotline (commencing Q1).	Web content to publication	At least 25 schools will be in a position to adopt plans for a facility within first year.	Improved access for charter schools to facilities and facility financing through systemic change.
Partnership and Coordination with local charter school associations and authorizers.	Creation of Content (Q1-Q4)	Present and market CSU resources at state and national conferences.	Serve approximately 81,000 students overall as a result of CSU.	Replicable model to expand CSU-type support to additional states.
	Develop and deliver webinars (Q1-Q4)	CSU Webinar Series	Replicable model of to expand CSU-type support to additional states.	
	Provide one-one Consultations with schools (Q1-Q4)	Demonstrated high-interest in the program as measured by web and hotline analytics.		

		Demonstrated replicable model of CSU for SEAs, Authorizers and charter support organizations to adopt.		
		Case studies focused on the needs of schools.		

**(2) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable.**

This project seeks to further the goals of the U.S. Department of Education by disseminating best-practice information in supporting charter schools. The CSU-Expansion Project goals speak directly to:

- 1.) The Absolute Priority of Improving Charter School Access to Facilities and Facility Financing; and
2. The Competitive Preference Priority of Empowering Families and Individuals to Choose a High-Quality Education That Meets Their Unique Needs.

In order to address these critical priorities, Building Hope will use this award, coupled with our unparalleled experience and partnerships, to achieve the following objectives and outcomes:

Measurable Project Objectives:

- Establish the CSU-Expansion serving rural charter schools, New York, Washington, DC and Texas ensuring a replicable model that disseminates best practices in supporting charter schools.
- Market and leverage Building Hope’s CSU-Expansion to maximize its use and deployment of the services provided. The specific services are detailed in full below in section (3), but they include:
  - Developing CSU-Expansion Website;
  - Launching of the Charter Support Hotline;
  - Developing CSU-Expansion Webinar Series; and
  - Developing and executing One-on-One Consultations with charter school leaders.
- Demonstrate a high interest in the CSU-Expansion Project to as measured by the number of inquiries coming into the Support Hotline and analyzing the types of inquiries so that other SEA’s, authorizers, and charter support organizations can learn from and adopt best-practices in assisting charter schools in accessing facilities and facility financing.

Measurable Project Outcomes:

- The CSU-Expansion will provide support to at least 180 schools within first two years of operation. Building Hope realistically projects that at least 100 rural schools will be served across multiple states; at least 30 schools in New York, 30 schools in Washington, D.C. and at least 20 schools in Texas.

- Based on the average enrollment of charter schools, approximately 81,000 students will be served as a result of the CSU-Expansion.
- At least 25 charter schools will be in a position to adopt plans for a facility within first year.
- Improved access for charter schools to facilities and facility financing through systemic change.
- SEA's, authorizers and local charter support organizations will have a replicable model to expand CSU-type facilities support to additional states.

**(3) The extent to which the proposed project represents an exceptional approach to the priority or priorities established for the competition.**

Building Hope is an experienced technical assistance provider. Our work directly working with charter schools these past 15 years demonstrates a real need for this kind of effort. Access to facilities and facility financing is the greatest and most persistent challenge charter schools face. As stated previously in this application, we also believe there is room and a need for multiple efforts to combat this challenge.

The CSU-Expansion is designed to build on the proven success of Building Hope's Florida program and intensively provide services to school leaders in New York,

Washington, DC, Texas, and in rural jurisdictions. What makes Building Hope's approach unique and exceptional is that it comes with proven strategies that help create high-quality charter schools as discussed in detail below.

### **Charter Support Hotline**

A key component of this project is the Charter Support Hotline. Charter school operators will be able to call or email the CSU-Expansion whenever they have general questions or need assistance regarding charter school operations and facilities. The project assumes one full-time employee to triage all of the calls and emails, directing the inquiries to the appropriate website resources and Building Hope staff. Who will provide information on research-based best practices and policies, or verbally assist the school leaders with salient information. Building Hope will endeavor to provide individualized solutions, working with authorizers, SEA's and other available resources when necessary.

Building Hope will maintain a detailed contact log of people reaching out for assistance as well as the type of questions and concerns that charter school operators are having.

Building Hope will also maintain a summary of the types of calls to include in publications. The log will include the date of the contact, the role of the person contacting the CSU-Expansion, the length of time spent on the contact, and a general description of what the contact was about. The goal will be for the CSU-Expansion to average two or three requests per week (historically the FCSU fielded an average of 2.35 contacts per week).

### *One-on-One Consultations*

Occasionally charter school operators need more assistance than can be given through a simple telephone call or email on the support hotline. In many instances, they may need to meet with someone to review documents such as lease or developer agreements, have someone attend a board meeting, a site visit, a design meeting with an architect or a meeting with a local government agency or official, or just offer general advice. Building Hope is available to meet individually with charter school leaders and/or board members either in person or online to discuss specific facility or operational issues with which schools may need assistance. A wide variety of issues can be addressed through consultations based on the needs of the individual schools requesting the assistance. These one-on-one consultations are also an opportunity for Building Hope's experienced CSU-Expansion team to provide greater support on the challenges addressed in the Absolute Priority 2. Specifically, the Building Hope staff can help charter leaders maneuver the following:

- Accessing public and private (including philanthropic) funding for facilities;
- If applicable in state statute, accessing public facilities, including the right of first refusal;
- If applicable by law, accessing to per-pupil facilities aid to charter schools to provide the schools with funding that is dedicated solely to charter school facilities;

- Accessing credit enhancements and other subsidies where available;
- If applicable by law, Access to bonds or mill levies by charter schools, or by other public entities for the benefit of charter schools;
- Assistance with planning for facility acquisition, including comprehensive analysis of facility needs;
- Developing short and long-term strategic facility plans;
- Facility needs assessments;
- Facility project feasibility and affordability analysis;
- Developing realistic financial projections and project budgets;
- Review of governance and board of directors' requirements;
- Review of state-specific statutes and regulations that apply to charter schools;
- Assisting with operational challenges;
- Exploring facility financing options;
- Providing guidance on complex financial transactions like New Market Tax Credits and Tax-Exempt Bonds.
- We will also provide technical assistance focused on securing USDA funding. One of the most valuable financing tools for rural charter schools is the USDA Community Facilities Program. The CSU-Expansion will help schools with Community Facilities grants and loans.

Whenever possible, we try to encourage the use of online meetings in order to reduce travel costs. However, attending board meetings and meetings with charter school administrators are often necessary for charter schools that request such services. Building

Hope will maintain an internet-based meeting solution which will provide for online digital meetings where consultants can discuss and review documents, as well as discuss issues and concerns with charter school operators. Charter operators will be able to request a consultation through either the support hotline or through an online request form which Building Hope will make available.

### **CSU-Expansion Webinar Series**

In most cases, professional development is geared towards traditional schools and charter school leaders are required to try to apply the information traditional sources provide to their charters. Webinars allow for targeted professional development that focus on the specific needs of charter school leaders and increases the effectiveness of charter schools, specifically targeted towards new schools or new school leaders, but beneficial to all charter school stakeholders.

With this award, Building Hope will conduct an online webinar series that focuses primarily on the facility and operating procedures of successful charter schools. Building Hope will assess early results from the Charter Support Hotline to develop webinars on topics that are based on a formal assessment of each state's charter school needs. We will continue to develop the list of webinar topics and work on scheduling the presentations over the course of the year. The software currently being utilized by the FCSU and our technical assistance center in D.C. allows for up to 100 people to participate live with

each specific webinar, a threshold we have only once ever surpassed, and in which case we can temporarily increase the number of active users.

The goal will be to schedule webinars approximately every two to four weeks during the year-long project period with ample notification for registration. Specific topics will be added as the issues emerge through the statewide charter schools needs assessment, consultations, and on-site assessment components of the CSU-Expansion work. Building Hope staff will present some of the webinars, but will also reach out to other experts, operators of other successful charter school groups, charter support organizations, etc.

### **CSU-Expansion Website**

Since its inception, the FCSU has maintained a website at [www.flcsu.org](http://www.flcsu.org) to use to disseminate information about our services, post webinar recordings and to post the resources which are created through the FCSU. The site currently has over 300 posts with resources which are available at no charge to anyone who visits the website. Even though a strong push in marketing the CSU-Expansion's service has not been made in the last two years, the site continues to average approximately 180 active users per week.

Similar to the website in Florida, the CSU-Expansion project will develop a website specific to the needs of charter leaders in rural jurisdictions and in New York, Washington, D.C. and Texas. The new website will continue to be made available and

updated to these targeted communities but will of course be available and marketed nationally so as to ensure the dissemination of information.

**(4) The mechanisms the applicant will use to broadly disseminate information on its project so as to support further development or replication.**

As described in section (3) the primary mechanism to disseminate information on this project will be the CSU-Expansion Website. All information pertinent to the project will be housed on this portal for anyone to access. Building Hope will also employ a marketing strategy that not only informs charter school leaders in our target markets that the CSU is a resource available to them, but also one that highlights the best-practices of the program to a much broader audience. A few activities specific to disseminating information include but are not limited to:

- Presenting and marketing of CSU-Expansion resources at state and National Charter School Conferences;
- Direct email campaigns targeted at Charter Leaders in jurisdictions covered by the CSU-Expansion;
- Converting critical web content and resources to publication for distribution;
- Preparation of case studies focused the challenges and resolutions of charter schools served by the CSU-Expansion;
- Conducting webinars with national and state associations, authorizers, etc. to discuss the work of the CSU-Expansion;
- Prepare presentations and develop training manuals specific to the facility needs of charters, especially those in rural jurisdictions; and

- Present the analysis of the Charter Support Hotline findings on the most pressing facility issues charter schools face.

**(C) QUALITY OF THE MANAGEMENT PLAN AND ADEQUACY OF RESOURCES (15 points).**

**(1) The adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks;**

As with all major projects at Building Hope, specific goals, objectives and timelines will be established for each of the parties involved in the CSU-Expansion projection. These goals, objectives and timelines will be reviewed by senior management on a regular basis (quarterly) to ensure that the project is proceeding as planned and has sufficient corporate resources any unforeseen issues. Since Building Hope has already established a successful support unit in Florida, it understands quite well the resources required to do what is required of the CSU-Expansion project.

**(2) The extent to which the costs are reasonable in relation to the objectives, design, and potential significance of the proposed project;**

The budget for the CSU-Expansion project was derived from Building Hope's experience running the FCSU successfully since 2012. As explained in greater detail in the Budget Form 524 and the attached Budget Narrative, the budget for this proposed project is expanded to serve three states and rural charter schools across multiple states.

Relationship Managers across the targeted markets will be supported by Building Hope's

national office staff and resources, providing greater efficiencies in project management and resources.

**(3) The relevance and demonstrated commitment of each partner in the proposed project to the implementation and success of the project.**

Building Hope has established deep relationships Nationwide within the public charter school community over the past 15 years. These partnerships are essential to the customized support we offer to our client's year-over-year. Our partners, some of which submitted letters of support for this grant application, recognize the challenges their schools and organizations face in developing and managing sustainable facilities.

Building Hope's proven success in offering assistance in the planning and implementation of school facility projects is what has enabled our partners to include both LEAs, CMO's and Organizations to confidently rely on our technical assistance expertise. As shown in *Exhibit B*, six organizations have submitted letters in support of our application for the Department of Education's Technical Assistance Program.

The DC Association of Chartered Public Schools is a non-profit organization launched in 2004 to improve opportunities and outcomes for students by supporting the development, growth, and sustainability of quality chartered public schools in Washington, DC. The Association serves all chartered public schools in the District of Columbia, totaling 43,429 to-date, which equates to 47 percent of the total public school enrollment.

EdTec, a social venture founded in 2001 to develop, support, and advance high-quality charter schools has supported over 400 charter schools, CMOs, and charter school

support organizations across the country in eleven states. EdTec points out that their support has included ‘navigating a myriad of financial and operational challenges, but the one challenge that consistently comes up, regardless of state or urban or rural status, is indenting viable, affordable facilities and facility financing.’

Three public charter schools also submitted letters of support; Leadership Preparatory Charter School, located in Memphis, TN, Emblaze Academy Charter School, and lastly, Hebrew Public, both located in New York.

**(D) QUALITY OF THE PROJECT PERSONNEL (10 points).**

Building Hope’s staff consists of 30 full-time employees, many of whom have been with the organization for at least 5-10 years. The qualifications of this project’s key personnel are outlined in detail below, but the team consists of experts in real estate, finance, operations and governance who regularly provide one-on-one counseling to charter schools. Building Hope staff members have worked closely with schools to identify and analyze potential development sites, create financial models and budgets, analyze the affordability of potential sites, provide legal assistance, provide pre-development and construction expertise, work with lenders to finance the acquisition and renovation of sites, provide direct loans, credit enhancements, and lease guarantees. In some instances, we were called upon to develop sites and lease them to charter schools at below market rates. Building Hope’s services a offered at no cost to the schools and financial assistance (loans, lease guarantees) was provided at below market rates.

The project team has been, and will continue to be, indirectly supported by the other members of the Building Hope staff. One new full-time employee may be hired to support this project by managing the call center, website inquiries and general constituent services.

**1.) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability.**

Building Hope is an equal opportunity employer and is committed to promoting a diverse workplace. We offer a rewarding work environment, a competitive benefits package, and the opportunity to make a difference.

Building Hope's staff, leadership team and members of the Board of Directors are highly diverse in terms of race, color, national origin, age, sexual orientation and religion. They are all actively engaged in their communities, serving on boards of schools and/or organizations that champion members of minority groups, low-income communities and causes that serve those traditionally underrepresented. (More detailed information on these affiliations can be found in Appendix A and Appendix E.)

**2.) The qualifications, including relevant training and experience, of the project director or principal investigator.**

**Curtis Fuller**, Director of Charter School Operations, Southern Region, is the Project Director. In this capacity, he will have general oversight responsibility, including 1) ensuring all program goals and objectives are met; 2) marketing the program; 3) identifying new sources of capital to continue the CSU-Expansion after the grant period ends; and 4) overseeing the portfolio of supported schools. He is responsible for the program's overall management and evaluation, including the preparation of the annual performance reports.

For the past six years, Mr. Fuller has been providing technical assistance support to Florida's charter schools with Building Hope. Since 2012, Mr. Fuller operates and directs the FCSU. Prior to joining Building Hope, Mr. Fuller served as a Superintendent and Principal making him uniquely positioned to engage directly with charter school clients and offer expertise in the areas of operations and governance. Mr. Fuller ran a public charter school for over seven years where he oversaw 70 full time employees. Mr. Fuller's first-hand experience and knowledge of charter school operations and facilities needs makes him uniquely qualified to lead this project.

Mr. Fuller has a master's degree in educational leadership from Cardinal Stritch University in Wisconsin. (See Appendix A for more details).

**3) The qualifications, including relevant training and experience, of key project personnel.**

*DC CSU TEAM*

**Tom Porter**, Vice President, Mid-Atlantic Region. Mr. Porter manages real estate

transactions and directs project management efforts for charter schools in the mid-Atlantic region, including Washington, D.C. He also directs Building Hope's nationwide credit enhancement program through Building Hope's America's Charter School Finance Corporation affiliate.

Mr. Porter has more than 20 years' experience in key administrative positions in start-up organizations in both the for-profit and nonprofit sectors. He holds a bachelor's degree in business administration from San Francisco State University and a master's in nonprofit administration from the University of San Francisco.

Mr. Porter volunteers in support of public education and health care and has served on numerous board of directors, including Washington Yu Ying and Two Rivers public charter schools, both in Washington, D.C.; and Chase Brexton Health Care services in Maryland. He was the second Building Hope employee and over his tenure has been instrumental in growing Building Hope.

**Dominique Fortune**, Manager, Mid-Atlantic Region. Ms. Fortune has supported Technical Assistance efforts for Building Hope over the past two years, building advocacy efforts, leading project management and community relations in Washington, D.C. Ms. Fortune has over six years of project management experience supporting Federal Government contracts prior to joining Building Hope.

Ms. Fortune is one of the founders of Lee Montessori Public Charter School in D.C.'s Ward 5 Brookland neighborhood, and currently serves as their Board Chair, a role she's been in for the past five years. She also supports Building Hope's technical assistance

efforts for start-up or expanding public charter schools nationwide. Ms. Fortune holds a bachelor's degree in communications from The College of Charleston.

*TX CSU TEAM*

**Dru Damico**, Vice President Western Region and of Real Estate Development.

Mr. Damico leads Building Hope's charter school development and construction projects nationwide and provides comprehensive support services to charter schools in the western region of the United States. With 20 years' experience in real estate and construction, Mr. Damico has been active in community-based development and has overseen charter school, retail, and entertainment projects. These projects include historic and LEED-certified real estate development.

Prior to joining Building Hope, Mr. Damico served as an owner's representative in the planning, design, financing, construction, and completion of new charter school space. He has served as Director of Development for Howa Construction Inc.; as a project executive for the Pyramid Companies; and in project management and business development positions with subsidiaries of two publicly held companies, Omnicom and Interpublic Group.

Mr. Damico has a bachelor's degree in information systems from Fairfield University School of Management. He is active in his local community and serves on several boards for charter schools and other nonprofits.

**Shawn McCormack**, Director. Mr. McCormack will support Mr. Damico's Nationwide efforts and direct development, technical assistance and client engagement in the state of Texas. Mr. McCormack comes to Building Hope after working for KIPP: San Antonio for the past five years serving as their Chief Financial Officer where he managed finance, accounting, compliance and development functions.

Prior to joining KIPP, Shawn as an Education Pioneer graduate where he helped to identify and implement school operations best practices. Shawn began his career as a CPA with Pricewaterhouse Coopers, later joining Peregrine Financial Corporation, a private wealth management organization.

Mr. McCormack graduated from Tulane University with a bachelor's degree in finance and a master's degree in Accounting, as well as a MBA from the University of Texas.

#### *RURAL CSU TEAM*

**Anthony Warn**, Manager, Real Estate. Mr. Warn is responsible for training school leaders with business operations, marketing and outreach. Mr. Warn is a former educator and former principal of a rural charter school in Idaho. Prior to joining Building Hope, Mr. Warn was the Director of Education Program for Bluum, and Idaho-based organization leading education reform efforts across the state.

Mr. Warn holds a M.Ed. in Organizational Leadership and a M.A. in Educational Administration, both from Teachers College at Columbia University. Mr. Warn earned his bachelor's degree from Kenyon College in Ohio.

**Seth Whetzel**, Manager, Lending and Portfolio Management. Mr. Whetzel is primarily responsible for the upfront financial analysis, as well as monitoring and servicing the loan portfolio of the schools Building Hope finances. He supports the technical assistance program by analyzing the governance and academic performance of the charter schools Building Hope serves.

Prior to joining Building Hope, Mr. Whetzel Served as the Director of New School Growth for Seton Education Partners in New York City. Mr. Whetzel holds a M.B.A. from George Mason University, M.Ed. and B.A. from The University of Notre Dame.

**(E) QUALITY OF THE PROJECT EVALUATION (10 points).**

Building Hope has developed a rigorous performance management system internally to effectively evaluate every project and investment we make. It is critical that we do so for our investors, donors and grantors. The success of CSU-Expansion project will be measured through the effectiveness of its implementation. The project will be monitored and evaluated to measure its impact on the charter schools served. The operational monitoring and evaluation process will include the following components:

- The CSU-Expansion project will be reviewed at quarterly leadership meetings. During these meetings, personnel responsible for each activity will report on the schedule and time spent on the activity and the measurement of results.
- The Project Director and key personnel will evaluate the progress made each quarter through a dashboard with metrics that speaks to the project goals as defined in the Logic Model. The team can adjust resources and expectations accordingly.
- The team will track both quantitative and qualitative data on the schools served and the resources accessed and distributed.
- Building Hope's accounting team has developed a financial management system to track project costs across the organization. All costs associated with the CSU-Expansion will be tracked accordingly so the Project Director and key personnel can manage cash flow.
- The CSU-Expansion project will also be incorporated into individual performance objectives and performance reviews. These will be created at the outset of each year and reviewed according to the organization's evaluation process.
- The CSU-Expansion project activities will be reported to external audiences as part of the communication and marketing strategy. This will inform stakeholders of Building Hope's progress throughout the year.

- At the end of the grant period, Building Hope will submit a final performance report, with financials, in accordance with Education Title 34 CFR75.118.

## **APPLICATION REQUIREMENTS**

**(A) Project Plan** – A full project plan and logic model for the CSU-Expansion project can be found in the Selection Criteria section (A) Significance of the Proposed Project, starting on page 7 of this document.

- (i) Inputs and Resources: See Logic Model on page 13, and the attached Budget Narrative and Budget form 524B.
- (ii) Project Activities: See Logic Model on page 13.
- (iii) Project Outputs: See Logic Model on page 13.
- (iv) Project Outcomes: See Logic Model on page 13.

**(B) Management Plan** – The project management plan can be found in the Selection Criteria section (C) Quality of the Management Plan, starting on page 23.

**(C) Dissemination Plan** – The Dissemination Plan can be found in the Selection Criteria section (B) Quality of the Project Design starting on page 12.

**(D) Evaluation Plan** – The Evaluation Plan can be found in the Selection Criteria section (E) Quality of the Project Evaluation starting on page 31.