

**WEST OAK LANE CHARTER SCHOOL
BOARD OF DIRECTORS**

COMPOSITION

Sharmain Matlock-Turner	President	Public Relations; Government Affairs Strategic Planning; Organizational Mgt.
Horace Smith	Vice-Pres.	Program Evaluations; Educational Assessments
Vall Adams	Secretary	College Professor; Computer Technology
Marlene Owens	Treasurer	Education Administrator
Ron Drayton	Parent Rep.	Community Activist

West Oak Lane Charter School

What is a charter school?

A charter school is an independent public school governed by its Board of Trustees. Charter schools are funded by the same public funds that support the other public schools in the city. For each child that leaves the public school to attend our charter school, those dollars follow the child to our school. OARC has submitted its application to the Philadelphia Board of Education to establish the West Oak Lane Charter School. Although OARC -- with help from the Edison Project -- is the organization applying for the charter school, the school must be a separate entity. Because charter schools operate outside of the traditional structure of public education, they are free to adopt a variety of innovative practices that can lead to improved school performance. Charter schools still must comply with certain state and city guidelines, and must operate within the confines of their charter, or else the charter may be terminated by the local board of education.

Brief overview of the West Oak Lane Charter School

OARC plans to open the West Oak Lane Charter School in Fall 1998 as a K-5 school with 600 children (100 per grade). We plan to expand the following year to include grades 6 through 8. Each year, we plan to add a grade until by 2003, we have reached grade 12, and have enrolled a total of 1,300 children. It is very likely that the upper grades will need to be housed in a separate building from the lower grades, since we doubt we can find a location which can comfortably hold all the grades.

To assist in establishing the charter school, OARC intends to enter into a contract with the Edison Project whereby the Edison Project will provide start up money, instructional and operational support. The Edison Project is a private school management company which currently operates twenty-five public schools in thirteen communities across the country enrolling approximately 13,000 students. Several of those schools are charter schools.

Some of the primary characteristics of the school will be:

- An ambitious, standards-based curriculum, including: mathematics and science; reading and language arts (including Spanish for all students beginning in kindergarten); character and ethics; health and fitness; art and music; and practical arts.
- A curriculum incorporating integrated and hands-on learning.
- Extensive use of computer technology, including a computer in the home of each student, beginning in the third grade.
- A caring, committed team of educators backed by an extensive program of professional development.
- A 205 day school year and a longer school day with more flexibility in scheduling courses.
- A full day kindergarten.
- Instruction in local history and current local issues.

Dec 1997

Curriculum

The majority of the curriculum is provided by the Edison Project. The Edison Project conducted years of research to determine the best educational practices, and has adopted those practices as its curriculum. Although Edison provides a majority of the curriculum, there is flexibility. The community (OARC through its representation on the Board of Trustees, and the parents) have input in shaping the curriculum as well. Furthermore, Edison continues to research educational practices nationwide, as well as monitoring how well its own practices are working, therefore offering flexibility if the school determines that something is not working, or there is a better option.

The following is a brief overview of some of the core components of the curriculum:

- **Reading** The curriculum uses the *Success For All* reading program developed at Johns Hopkins University. This is a phonics based program, which is being used in many schools around the country. U.S. Secretary of Education Riley recently endorsed the *Success For All* reading program.
- **Mathematics** The University of Chicago math program is used, which emphasizes the development of conceptual, computational and problem solving skills through a variety of hands on activities and projects.
- **Science** The *Science for Life and Living* program is used, which uses the constructivist method of teaching. The program emphasizes hands on experiences with the development of scientific hypothesis and conducting experiments.
- **Technology** The school will adopt Edison's "Technology as a Second Language" (TSL) program, which emphasizes incorporating computer technology into many aspects of the curriculum rather than designating a specific computer class. The TSL program assures that students are comfortable with using computers daily as part of their lives.
- **Character and Ethics** Character education plays a crucial role in the curriculum, and like technology, is incorporated throughout the curriculum. The *Heartwood Ethics Curriculum for Children* is used, focusing on eight core values: wisdom, justice, courage, compassion, hope, respect, responsibility and integrity.

School structure

The school is structured to assure a small and personal educational environment for the children. The school is organized into a series of Academies: Primary Academy (grades K-2); Elementary Academy (3-5); Junior Academy (6-8); Senior Academy (9-10); and Collegiate Academy (11-12). While a principal governs the entire school, each Academy has its own director. Each Academy is further divided into multi-aged Houses. The House is the basic organization unit of the school, where students work and learn in the company of about 100-125 children while in their Academy. This format promotes a close personal relationship among students, faculty members and parents.

The average class size is 25 students. Because all teachers will teach reading, these classes will be smaller, with an average of 20 students.

Professional Development

Staff at the charter school will have ample opportunity for professional development. Each teacher has time set aside every day which they can use to plan their lessons and to observe other classrooms. Teachers can also benefit from the national support network of other Edison schools. Teachers attend training conferences in other cities, and receive training on site from other Edison teachers who have been selected to be national trainers. Finally, the Edison Project's employment structure rewards teachers for quality performance, therefore motivating the staff to achieve.

Family Input

One of the main goals of the school is to be parent-friendly. A common complaint we heard at our town meetings were that parents are not made to feel welcome in the public schools. Parents will have input from the very beginning. Parents will help shape the curriculum, will vote on whether or not to require uniforms, will form a Parent Advisory Council, will be represented on the Board of Trustees, and will be welcome to volunteer at the school. Furthermore, parents of children in the third grade and above can communicate with the school via the networked computer in their home. Parents can also use the computer to volunteer, even if they do not have the time to be in school. (i.e. a parent can volunteer to be online to offer tutorial help)

Admission

The school is open to all residents of Philadelphia, and admission will occur on an open enrollment basis. We are assuming that there will be greater demand for the school than there is room, and we will therefore conduct a lottery. If one child is accepted to the school, then the siblings will also be admitted to the school.

Governance

The initial Board of Trustees is:

Sharmain Matlock-Turner	President
Horace Smith	Vice-President
Vall Adams	Secretary
Marlene Owens	Treasurer
Ronald Drayton	

Summary Of Act 22 of 1997

Senate Bill 123, sponsored by Senator Mowery, allows for the establishment of charter schools in Pennsylvania.

A charter school is an independent public school established under a charter from a local board of school directors. A charter school must be established as a public, non-profit, non-sectarian entity. A charter school may be established by an individual, teachers, parents, a non-sectarian institution of higher education, a museum, a nonsectarian corporation not-for-profit, a corporation, association, partnership, or a combination of the above. A school entity is not permitted to establish or operate a charter school.

An existing public school may be converted to charter a school by having the approval of more than 50% of the parents of children in the school and more than 50% of the teaching staff in the school.

The Act outlines the application and appeal process. It defines the requirements for the establishment of regional charter schools. A charter may be granted for no more than five years by the local board of directors with the right of appeal to a state charter school Appeal Board if the application is denied or not renewed. However, no appeal may be taken to the Board until after January 1, 1999. After the two year moratorium the charter school applicant must obtain a petition signed by either 2% of the adult population of the district or 1,000 adults within the district, whichever is less, before an appeal can go to the Appeal Board.

A charter school shall enroll students who make a timely application and are residents of the school district. Nonresident students may also be enrolled. Capacity issues shall be settled by the use of a lottery. Discrimination is prohibited in admission decisions. However, the charter school may limit admission to a particular grade level or area of concentration and may set reasonable criteria to evaluate prospective students, consistent with the charter.

At least 75% of the professional staff of a charter school must hold a Pennsylvania teaching certificate. The charter school must present evidence that the non certified teachers meet certain qualifications. The charter school staff may bargain collectively but not as part of the school district's bargaining unit. Protections are built into the Act to allow for teachers in the school district to transfer to a charter school without penalty to employee rights, seniority, right to return, retirement, health benefits, and tenure.

Charter schools will receive operating funds from both the state and local level. Funding is provided by removing allocations that are not instructional from the total expenditures per average daily membership of the school district. Temporary financial assistance is available to a public school district if there is an increase in its enrollment due to the transfer of students from non-public schools to charter schools in the amount of the \$1 million. The Act also provides for temporary transitional funding to a school district due to budgetary impact relating to any student attending a charter school. This funding in the amount of \$7.5 million will be provided through a grant program administered by the Department of Education. Federal funds in the amount of \$4 million are also available for the start-up cost of charter schools.

Transportation is provided for students in charter schools in the same manner as is provided to other schools in the district. The same limitations applying to the transportation of non-public students apply to non-resident students who attend charter schools.

The Act provides a listing of school code regulations and statutes that directly apply to charter schools. Charter schools must comply with all other regulations and statutes that apply to other public schools (other than the school code).

Employees of a charter school are considered public employees and the board of trustees is considered a public employer for the purpose of the application of liability.

The Act establishes certain requirements for on-going access to records and facilities of the charter school and for the evaluation of charter schools by an independent consultant.

CHARTER SCHOOLS FOR PENNSYLVANIA BILL ANALYSIS

Definition of Charter School

Act 22 (Section 1703-A) defines the charter school as “an independent public school established and operated under a charter from the local board of school directors and in which students are enrolled or attend. Charter schools must be a public non profit, nonsectarian entity and may be established by creating a new school or converting a part or all of an existing public school.

Regional Charter School

A regional charter school is “an independent public school established an operated under a charter form more than one local board of school directors and in which students are enrolled or attend.”

Powers of a Charter School (Section 1714-A)

- adopt name and corporate seal
- solicit and accept gifts or grants
- acquire real property
- receive and disburse funds
- make contracts and leases
- incur temporary debts
- sue and be sued
- other powers not inconsistent with the act which are needed to fulfill charter

Term of Charter (Section 1720-A)

The charter provides legal authorization for the establishment of the charter school for a period of not less than three, nor more than five years, and may be renewed for five-year periods.

Revocation and Nonrenewable of Charter (Section 1729-A)

Causes for termination by the local board of school directors include the following:

- material violations of the written charter requirements
- failure to meet the requirements for student performance in charter
- failure to meet generally accepted standards of fiscal and audit requirements
- violation of the Charter School Act
- violation of law
- conviction of fraud

Role of Appeal Board in revocation or nonrenewable decisions (Section 1729-A)

After the Appeal Board is established, the board shall consider the same criteria for a renewal of an application as for an initial application. The Appeal Board’s decision requires the local board of directors to sign the written charter of the charter school. If the board of school directors does not sign the charter within ten days, then the chair of the Appeal Board can sign the charter.

Conviction of Crime (Section 1729-A)

Board of trustee members who are convicted of a felony or crime involving moral turpitude are immediately disqualified from serving on the board of trustees of the charter school.

Notice of revocation or nonrenewable Charter(Section 1729-A)

Such notice must include the reasons for nonrenewable or revocation. Local school directors must conduct a hearing and present evidence to support revocation or nonrenewable. A reasonable opportunity must be available for the charter school to offer testimony prior to final action. Thirty days must be provided for public comment prior to final action by the local board of school directors. This hearing shall be conducted pursuant to Sunshine requirements. This decision may be appealed to the State Charter School Appeal Board.

Emergency Revocation (Section 1729-A(G))

In cases where the health or safety of the charter school's students or staff is at serious risk, the local school board may take immediate action to revoke the charter.

Dissolution of A Charter School (Section 1729-A(I))

Any remaining assets of the charter school shall be distributed proportionally to school entities with students enrolled in the charter school for a the last full or partial school year of the charter school.

Establishment of a Charter School

A charter school may be established by an individual, one or more teachers, parents or guardians, a nonsectarian college, a university or museum, a nonsectarian corporation (not-for-profit) corporation, an association, a partnership or combination of any of these entities. (Section 1717-A)

Conversion (Section 1717-A-(B))

Conversion of the public school to a charter school can only take place if more than 50% of the teaching staff in the school have signed a petition in support of the public school becoming a charter school and more than 50% of the parents or guardians of pupils attending that public school have signed a petition in support of the school becoming a charter school.

Board of Trustees (Section 1716-A)

The Board of Trustees decides matters related to the operation of the school. The Board of Trustees may employ, discharge, and contract with necessary professional and nonprofessional employees. No member of the school board can serve on the board of trustees of a charter school.

Application Process (Section 1717-A)

The application is submitted to the local board of school directors of the district where the charter will be established by November 15, of the school year preceding the establishment. The review of application requires a public hearing within 45 days of receipt of application. the hearing will meet the requirements of the Sunshine Act. After at least 45 days and not more than 75 days after the first public hearing, the board must render a final decision. Timelines are shorter for the 1997-98 school year.

Criteria for evaluation of Charter school application (Section 1717-A)

- demonstrated, sustainable support for the charter school plan
- capability of charter school applicant to provide a comprehensive learning experience

- application contents, as defined by law
- potential to serve as a model

Application Contents (1719-A)

- identification of the charter applicant
- name of school
- grade or age served
- proposed governance structure
- mission and education goals, including curriculum and assessment methods
- admission policy and criteria for student evaluation
- suspension and expulsion policy
- involvement of community groups
- financial plan and audit plan
- review of complaint procedures
- physical facility description and address
- proposed school calendar
- proposed faculty and professional development plan
- plans for participation of students in school district extracurricular activities
- report of criminal history record for individuals employed by school
- official child abuse clearance statement
- plan for liability and appropriate insurance coverage

Facilities (Section 1722-A)

A charter school may be located in an existing public school building or in part of a building, on a privately owned site, or in a public building. The building is exempt from public school facility regulations except for health and safety regulations. Construction of a building with public funds with funds from the Department or a local school district is prohibited. Certain statutory requirements related to construction projects apply to charter school facilities and are outlined in section 1715-A.

Transportation (Section 1726-A)

Students who are residents of the district shall be transported on same terms and conditions as transportation is provided to students attending the schools of the district. Nonresident students shall be provided transportation in the same way in which transportation is currently provided to non-public school students.

Tort Liability (Section 1727-A)

Employees of the charter school shall be considered public employees and the board of trustees shall be considered the public employer in the same manner as political subdivisions and local agencies. The board of trustees and the charter school are solely liable for legal damages resulting from any legal challenge involving the school. Local directors of the school entity shall not be held liable for any activity or operation related to the program of the charter school.

Appeal process for Charter Schools-(Section 1717-A)

The State Charter School Appeal Board shall have the exclusive review of an appeal by a charter school applicant. Appointments by the Governor to the Board shall not occur prior to January 1, 1999.

Moratorium on appeals Process

No appeal from the decision of a local school board may be taken until July 1, 1999.

State Charter School Appeal Board (Section 1721-A)

The board shall consist of seven members appointed by the Governor, including:

- the Secretary of Education
- a parent of school-aged child
- a school board member
- a certified teacher, employed in a public school
- a faculty member or an administrative employee of an institution of higher education
- a member of the business community
- a member of State board of Education

A majority of members of the board shall constitute a quorum and can establish rules for its operation. Members shall receive reimbursement for expenses. Staffing assistance for the board shall be provided by the Department of Education and legal advice shall be provided by the Governor's General Counsel. Sunshine provisions shall apply to the meetings of the Appeal Board.

Type of Review

The Appeal Board shall review the record of proceedings on the charter school application as certified by the local board of directors. The Appeal Board shall allow the local board of directors and the charter school applicant to supplement the record if such information was previously unavailable.

Petition Requirement and Timelines for Review

In order for a charter school applicant to be eligible to appeal the denial of a charter by a local board of directors, the applicant must obtain the signatures of at least 2% of the adult residents of the school district or 1,000 adult residents, whichever is less. Specific requirements for the petition process are outlined in the Act. Signatures must be obtained within 60 days of the denial of the application and the petition may be presented to the Court of Common Pleas. The Court shall hold a hearing to determine the sufficiency or insufficiency of the petition. If sufficient, the decree shall be transmitted to the state Charter School Appeal Board for review.

The Appeal Board must meet to consider the appeal no later than 30 days after the date of notice of the acceptance of the appeal to review the certified record. A written decision shall be issued by the Appeal Board not later than 60 days following the review.

Issuance of Charter

If the Appeal Board reverses the decision of the local board of directors that decision serves to require the local board to grant the application and sign the charter. However, if the local board

refuses to grant the charter within ten days, then the charter shall be deemed approved and signed by the chair of the Appeal Board.

Court Appeal

All decisions of the Charter School Appeal Board shall be subject to review by Commonwealth Court.

Staffing of Charter School (Section 1724-A)

Staff

The level of compensation and terms of employment of charter school staff shall be determined by board of trustees of the charter school, unless otherwise determined in the Law.

Certification

At least 75% of the professional staff members of the charter school shall hold appropriate state certification. The charter school application shall list the general qualifications needed to staff any non-certified positions. Non-certified employees must meet certain requirements defined in the school code and demonstrate a combination of , achievement and qualifications in basic skills, general knowledge, professional knowledge, and practice and subject matter knowledge in the subject area where an individual will teach. Time completed in satisfactory service in a charter school shall be applied to length of service requirements for the next level of certification.

Organization and Collective bargaining

Charter school employees may organize under the Public Employee Relations Act. Collective bargaining units at a charter school shall be separate from any collective bargaining unit of the school district in which the charter school is located and separate from any other collective bargaining unit. The portion of the school code that requires the secretary to seek an injunction requiring the charter school to meet the minimum requirements for instruction applies to charter schools.

Retirement

Employees of a charter school shall be enrolled in the Public School Employees' Retirement System, unless at the time of the charter school application, the sponsoring entity or board of trustees of the school has a retirement program which covers the employees or the employer is enrolled in another retirement program which covers the employees or the employee is enrolled in another retirement program. The Commonwealth shall make contributions on behalf of charter school employees and the charter school shall act as the employer for purposes of Social Security payments. The market value/income aid ratio used in social security calculations shall be that of the school district where the charter school is located or a composite aid ratio if the charter school is a regional charter school. Employees of the charter school shall make regular member contributions as provided in law.

Health Benefits

Employees of the charter school shall be provided comparable health care benefits as those employed by a local school district. The charter school shall make the required employer's contribution to the designated health care insurance provider.

Leave of absence

A public school employee may request a leave of absence to work in a charter school for up to five years. Approval of leave shall not be unreasonably withheld.

Tenure

Temporary professional employees on leave from a school district may accrue tenure in the non-charter public school system at the discretion of the local board of school directors. Professional employees on leave shall retain tenure rights. Professional employees shall continue to accrue seniority in the school entity from which they came if they return to that entity when the leave ends.

Return to public school employment

The Act ensures that a professional employee who transfers from a public school has the right to return to a comparable position from which a professional employee is granted leave. The board of school directors can initiate proceedings, under Section 1122 of the School code, if a charter school has dismissed an employee for occurrences at the charter school that are adequate and independent grounds for discipline under Section 1122

Reports of criminal history record and child abuse clearance

These types of clearances are required for individuals employed by a charter school and for employees returning to a regular school entity after employment in a charter school.

Enrollment and Admission (Section 1723-A)

All resident children of the Commonwealth qualify for admission to a charter school.

Capacity

Preference shall be given to resident students. If more students apply to the charter school than attendance slots available, students shall be selected on random basis from a pool of qualified applicants. Qualified applicants must meet the required criteria of the charter school and submit a timely application. Preference may be given to the child of a parent who has participated in development of the charter school and to siblings of presently enrolled students.

Discrimination prohibited

A charter school shall not discriminate based on intellectual ability (with the exception of a particular grade level or area of concentration), athletic ability, measures of achievement, disability, English language proficiency or other illegal bases.

Limitations to admission

Admissions may be based on grade level or areas of concentration. Reasonable criteria may be established to evaluate prospective students.

Disposition of students when charter school closes (Section 1729-A)

Students shall apply to another school in the student's school district of residence and normal application deadlines shall not apply. Student records shall be transferred by the charter school to the district of residence.

Desegregation orders (Section 1730-A)

A local school board of a district operating under a federally approved or Human Relations Commission approved desegregation plan shall not approve a charter school application if this approval puts the district out of compliance with the plan.

Special Education (Section 1732-A)

The secretary shall have the authority and responsibility to ensure that charter schools comply with federal laws and regulations governing children with disabilities and shall promulgate regulations to implement this provision.

Required Statutes and Regulations

Charter School Requirements (Section 1715-A)

A charter school is:

- not exempt from requirements of law other than school code, as defined in the bill
- accountable to parents, public, and the Commonwealth as reflected in the charter
- not permitted to provide religious instruction
- not permitted to advocate unlawful behavior
- only subject to school code statute and regulations, as outlined in the Act
- required to participate in the Pennsylvania Assessment System
- required to provide a minimum of 180 days of instruction or 900 hours per year of instructions at the elementary level and 990 hours of instruction at the secondary level

Section 1732-A of the legislation outlines the applicable statutory provisions of the school code. Part (b) of that section defines the particular regulations that apply to charter schools.

Reports and Assessments (Section 1728-A)

Annual Assessment-Local Board Review

The local school directors shall annually assess whether the charter school is meeting the goals of the charter and conduct a comprehensive review prior to granting the five-year renewal of the charter. The local board of school directors shall have access to the records and facilities of the charter school at all times.

Annual report by charter School

The charter school is required to submit an annual report no later than August 1 of each year to local board of school directors and the Secretary.

Report and Evaluation

Five years after the effective date of the act, the secretary is required to contract with an independent professional consultant with expertise in public and private education. That consultant shall submit a report which evaluates the charter school program to the Secretary, Governor, and General Assembly.

Funding for Charter Schools (Section 1725-A)

Planning and Start-up grants (Section 1731-A)

The secretary shall allocate grants for planning and start-up for eligible applicants. Grants may vary based upon the size, scope and any special characteristics of the charter school applicant. The

applicant shall inform the local board of school directors of application for a planning grant and receipt of a start up front. (Federal funds are expected to be available for charter school start-up costs now that the charter school law has been enacted).

Tuition Charges by Charter School (1725-A)

There shall be no tuition charge for any student attending a charter school.

Charter School Funding

Each charter school student shall receive no less than budgeted total expenditures per average daily membership (of the prior year), minus budget expenditures for:

- non-public school programs
- adult education programs
- community/junior college programs
- student transportation
- special education
- facilities acquisition
- construction and improvement services
- debt service
- fund transfers as defined in Manual of Accounting and related financial procedures for Pennsylvania school systems

Special Education Student Funding

A charter school shall receive for each special education student, the same funding for regular education students, plus an additional amount which is determined by dividing the district of residence's total special education expenditure by the combined percentage established on an annual basis for special education calculations and contained in section 2509.5(k) of the School code.

Special Education Services

A charter school may request the intermediate unit in which it is located to provide services for exceptional students. The intermediate unit shall provide such assistance at the same cost as other constituent districts of the intermediate unit.

Temporary Financial Assistance

If a school district experiences an increase in its enrollment for the current school year due to the transfer of students formerly in non-public schools to charter schools, then the Commonwealth shall pay the school district of residence an amount equal to the school district's average daily membership for the prior school year. This payment shall occur only for the first year of the attendance of the student in a charter school starting with school year 1997-98. \$1 million for fiscal year 97-98 is set aside in an appropriation for this purpose. (see Section 3).

Temporary Transitional Funding

The commonwealth shall provide \$7.5 million available until June 10, 1999 to pay for any budgetary impact relating to any student attending a charter school. A school district that approves one or more charter schools may apply for a grant. The Department is required to

develop and publish criteria for this grant program. The criteria shall be published in the Pennsylvania Bulletin. (see Section 3).

Federal Funds

An appropriation of \$4 million is provided for federal funds to be available under the Improving America's School Act of 1994 to implements charter schools.

Payment Schedule

Payments shall be made to the charter school in 12 equal monthly payments. A student enrolled in the charter school is counted in the average daily membership of the student's district of residence for basic education funding payments. The Secretary can deduct the amount of payment if the school district fails to make a payment to a charter school.



February 9, 1998

RESOLVED, That in accordance with The Commonwealth of Pennsylvania's Act 22 of 1997, the Board of Education of the School District of Philadelphia hereby grants a charter to the applicant, Ogontz Avenue Revitalization Corporation, to operate the public charter school to be known as **WEST OAK LANE CHARTER SCHOOL**, for the period beginning September 1, 1998 and ending August 31, 2002, provided that all the following conditions are met satisfactorily to the School District of Philadelphia:

- That the applicant submits by July 15, 1998, on forms to be supplied by the School District, evidence that at least 300 students have been registered to enroll in the charter school for the 1998-99 school year;
- That the applicant, if it has not already done so, provides the School District the following legal documentation no later than August 3, 1998;
 - Evidence that the charter school has been organized as a public nonprofit corporation in accordance with Section 1714-A of the authorizing legislation;
 - Evidence satisfactory to the General Counsel of the School District that the Board of Trustees of the charter school has been authorized to sign a written charter with the Philadelphia Board of Education;
 - A copy of the signed lease or deed for each facility providing classroom or other space to the charter school;
 - Current use and occupancy certificates for each facility leased or purchased for charter school purposes;
 - A duly signed Statement of Assurances as attached, including the commitment to administer the same student assessment tools as the District.
- That the applicant or Board of Trustees of the charter school, as the case may be, no later than August 3, 1998, and on forms to be provided by the School District, provide evidence that sufficient staff have been hired to serve the actual enrollment expected and that each member of the said staff who will have direct contact with students has procured complete criminal history and child abuse records checks as required by the authorizing legislation, Section 111 of The Public School Code, and 23 Pa. C.S. Ch. 63, subch. C.2.

No rights or obligations shall accrue pursuant to this Resolution before each of the foregoing conditions has been met as the Board of Education in its sole discretion shall determine.



May 18, 1998

Andrea Thomas-Reynolds
Executive Director
Ogontz Avenue Revitalization Corporation
7178 Ogontz Avenue
Philadelphia, PA

Dear Andrea:

On Friday, May 15, I reviewed the latest developments regarding the West Oak Lane Charter School with my colleagues at the Edison Project, including John Reid, Mike Finnerty, Joe Keeney and Adam Feild. We discussed OARC's efforts to obtain a facility and related financing for the School, including your request for some additional time beyond May 15 to secure those arrangements.

Edison remains committed to the West Oak Lane Charter School effort and is still prepared to go forward with a fall, 1998 opening provided that the latest facility plan (involving the "Shop & Bag" property), along with a management agreement and an operating budget plan, can be confirmed by the close of business on May 20. Specifically, we are looking for documentation of the following:

1. A letter from the owner of the Shop & Bag property confirming his intention to enter into a twenty year lease with OARC and/or the West Oak Lane Charter School. JACU
2. A letter from Equi-Mor Holdings, Inc. confirming the terms on which it is prepared to provide financing for the renovation work at the School, without any material conditions or contingencies, and Equi-Mor's intention to close on or before June 15, 1998. ATR
3. A plan from the Turner Construction Company describing the steps to be taken to have the facility ready for occupancy by September 5, 1998, along with a cost estimate for the project. JACU
4. Agreement on the terms of a Management Agreement between the Charter School and the Edison Project. OK
5. Agreement on a five year preliminary operating budget plan for the School. OK

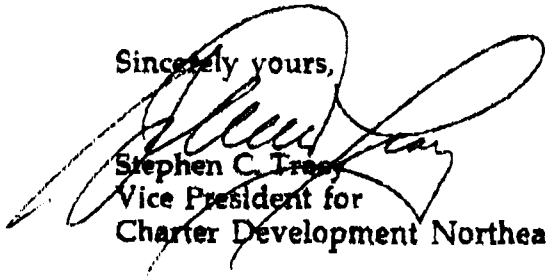
John 6. Confirmation of the new revenue figures that you provided last week, (including Title I funds for 1998-99 and beyond) from school district and/or state authorities.

Due to capital commitments related to school start up activities for this fall (including the West Oak Lane Charter School), the Edison Project is not in a position to extend bridge financing in connection with start up activities at the Charter School.

Like you, we remain concerned about the difficulties involved in opening the School in a well organized, quality manner this fall, given that two months of start up time have been lost since the original March 20 deadline for a "go/no go decision" on a 1998 opening. Accordingly, Edison is not prepared to proceed with a 1998 opening if the current Shop & Bag/Equi-Mor arrangements cannot be confirmed by May 20. Instead, we believe that a fall, 1999 opening would be in the best interests of OARC, Edison and the students and families that we hope to serve.

I will make myself available to work with you over the next three days in an effort to bring this matter to a successful conclusion. I will be with you in Philadelphia on the evening of May 20 for the Charter School community meeting.

Sincerely yours,


Stephen C. Treacy
Vice President for
Charter Development Northeast

cc: J. Cairns
A. Feild
M. Finnerty
J. Keeney
D. McGriff
J. Reid
C. Whittle

Ogontz Avenue Revitalization Corporation (OARC)
Neighborhood Investment Action Strategy
An Economic and Community Development Vision for West Oak Lane 1980 - 2000

OARC has created and is implementing a vision for West Oak Lane - operating as a developer and catalyst for development. The vision spans twenty years and includes a record of accomplishment that is unmatched in the city. Following is a summary chart of development projects which make up the bricks and mortar of the vision.

Name & Location	Cost	Funding Source	Status	Developer	Project Description	Jobs Generated
Ogontz Plaza 7100 Block Ogontz Avenue	\$2.5 Million	Phila. Capital Budget, UDAG, PCDC & Fidelity Loan	Completed 1987	KODE/OARC	15 commercial/retail spaces	150 construction & 60 permanent jobs
Ogontz Hall 7100 Block Ogontz Avenue	\$3.5 Million	City of Philadelphia, PHFA, CoreStates/First PA Bank, Philadelphia Housing Authority OARC (Special Limited Partner)	Completed May 1992	CANUS/ OARC/ Classic Mgmt.	31 apartments for low and moderate income families	20 construction jobs (approximately)
NIA Center 6801 North 16th St.	\$1.3 Million	DCA, OHCD Fund	Completed July 1995	GPAUC/ OARC	Child care center, Community College of Phila., family support services, community meeting center	80-100 construction jobs/plus permanent jobs
Ogontz III 7100 Block Ogontz Avenue	\$2.3 Million	Low Income Housing Tax Credit, National Equity Funding, OHCD, PIDC, PHFA BUF, RDA, PMBDA, PUFA, LISC, DCA	Completed July 1995	OARC	15 apartments and 5 commercial/retail spaces	40 construction jobs, 1.3 for neighborhood residents
Southeastern PA Training Center Stenton Avenue & Haines Street	\$8.6 Million	PA RDA Capital Grant, PA Dept. of Commerce, U.S. EDA/DOD Commerce Dept., PIDC, U.S. Healthcare, Pew Charitable Trust, Knight Foundation Grant	Completed February 1998	OARC	A 68,500 square foot, education and job training facility which includes commercial space	250 construction jobs/plus permanent jobs
*Hardshell Cafe 7100 Block Ogontz Avenue	\$800,000	Private Investors, PIDC, GPUAC	Completed April 1997	Hardshell/Ogontz L.P.	130-150 seat seafood restaurant	10 construction jobs & 50 permanent jobs
West Oak Lane Charter School	\$2 Mil -site \$3.5 Mil.- operations	State Department of Education & Philadelphia School District	Completed August 1998	OARC	Grades K – 4 elementary school with a total of 548 children.	57 full time staff

OARC Neighborhood Investment Action Strategy
An Economic and Community Development Vision for West Oak Lane 1980 - 2000

OARC was a catalyst for the following projects:

Name & Location	Cost	Funding Source	Status	Developer	Project Description	Jobs Generated
Simons Recreation Center Walnut Lane & Woolston Avenue	\$4.7 Mil	Pennsylvania Redevelopment Assistance, Major Corporation, Philadelphia Capital Budget	Scheduled completion June 1999	Recreation Dept./ Simons Advisory Council	Major renovating and restructuring of the facility for a recreation and youth access center	Construction jobs
Doris Apartments 7100 Block Forrest Avenue	\$400,000	DPW Grant	Completed 1991	1260 Housing Corp.	12 units of special needs housing	24 construction jobs
Concerned Black Men National Headquarters 7200 N. 21st Street	\$170,000	DCA Grant, Private Fund Raising	Completed 1994	CBM	National Headquarters: office/meeting space/ classrooms	10 construction jobs

* Operations ceased in 11/98. New Restaurant to open in Summer 1999.

Summary of Services

MISSION STATEMENT

The goal of the Ogontz Avenue Revitalization Corporation (OARC) is to be a performance-proven leader among community development non-profit agencies in Philadelphia. OARC's mission is to create and stimulate economic development and improve the quality of life for the West Oak Lane community. In achieving this objective, we will satisfy our responsibility to the community in which we serve, public and private sector supporters, governmental entities, board members, and employees.

Our services and development projects are designed to empower and enhance the quality of life for residents by renovating dilapidated commercial buildings to serve as new facilities with worthwhile products or services to sustain the retail segment of our community. In this respect, we will conduct our operations prudently and will seek the appropriate resources to support the longevity of services provided by our organization.

THE COMPANY

The Ogontz Avenue Revitalization Corporation (OARC) is a 501(c)(3) non-profit community development organization founded in 1983 by Pennsylvania State Representative Dwight Evans. The target area served by our corporation is bordered on the north by Cheltenham Avenue, the south by Stenton Avenue, the east by North Broad Street, and on the west by Vernon Road. OARC's role as community based development organization is to enhance the economic strength of the West Oak Lane Community by forming collaborative efforts with the governmental and private sectors to provide a holistic approach to community development and revitalization.

Realizing that community revitalization is a collective effort, a group of concerned volunteers joined together in 1983 and formed Friends of OARC (Friends). The initial focus of Friends was to encourage community support of Ogontz Plaza through the Annual Community Festival. Since its inception, Friends of OARC has evolved into a committee within the OARC Board structure and strengthens OARC's ability to address a myriad of social and community issues.

For the last ten years, OARC has grown from a group of concerned citizens to a twelve-member staff. These positions consist of an executive director, director of finance and administration, director of property management and real estate development, director economic development, director of communications, director of workforce development, senior accountant, jobs specialist, administrative assistants, clean sweep operator, and an office manager. OARC is governed by a 21 member board of directors who represent the accounting, finance, legal, governmental, community service, and academia professions.

Overall, OARC provides a wide range of services including mixed-use and commercial development, employment training referral services, clean sweep and business association support programs, civic programs and activities, and family and recreation centers.

Since 1986, OARC and Friends of OARC have sponsored a community festival designed to provide fellowship opportunities and to promote pride among the West Oak Lane residents. Over the past two years, the festival has expanded to four days ending with the Super Saturday Festival and Parade on the 7100 and 7200 blocks of Ogontz. The Community Festival attracts over 10,000 community residents and 125 street vendors.

OARC has functioned as one of six designated Private Industry Council Employment Referral Centers (PIC) since 1988. Additional programs include direct job placement services and participation in an annual job fair. OARC has received several awards from PIC for outstanding achievement and placement records. Over the past seven years, OARC has received numerous awards and recognitions from PIC for the employment services rendered by our organization. In addition, in 1996, OARC was selected as the service delivery agent for the Pennsylvania PREP (Profile Re-Employment Program) and instrumental in outlining the procedural aspects to be implemented for the Southeastern Pennsylvania Region.

In 1988, OARC established the Ogontz Avenue Police Mini-Station staffed with two police officers to increase the community's perception of safety. Still today, the mini-station works cooperatively with OARC, the Ogontz Avenue Business Association (OABA) and the Police Mini-Station Advisory Council.

In 1995, Philadelphia was selected as one of six cities nationwide to implement the Annie E. Casey Jobs Initiative Program. This seven year, \$7 million initiative is a coalition of Philadelphia area educators, business people, community lenders, funders, and public officials concerned with how residents in Philadelphia's low income neighborhoods connect with jobs in the regional economy. This initiative is focused in the West Oak Lane and Logan communities of Philadelphia, targeting minority men between the ages of 18-35.

COMPLETED DEVELOPMENT PROJECTS

Ogontz Plaza

By 1989, Ogontz Plaza was completely rehabilitated and fully leased providing the community with 75 permanent jobs. Ogontz Plaza is a 35,000 square foot neighborhood retail and commercial strip which underwent a \$2.5 million revitalization. The plaza is owned by Ogontz Associates, a subsidiary of OARC.

Ogontz Hall

In 1992, Ogontz Hall located on the 7100 block of Ogontz Avenue was completed. OARC was a special limited partner in this \$3.5 million revitalization effort of a 31 unit low-to-moderate income residential building.

Ogontz III

Ogontz III, also located on the 7100 block of Ogontz Avenue was completed in 1995. This was a \$1.4 million mixed use, commercial and residential, rehabilitation project. This facility consists of five office/retail-commercial spaces and 15 apartments for low-income families.

NIA Center

Aside from residential projects, OARC completed the \$1.5 million renovation of the NIA Center which houses services needed to empower residents of West Oak Lane. The NIA Center is a turn-key project developed by the Greater Philadelphia Urban Affairs Coalition on behalf of OARC. This 14,000 square foot building provides a daycare program, adult basic education, college level courses, foster care, family services and community meeting space. NIA is the fifth principle of Kwanzaa, and means purpose.

Hardshell Cafe, Ogontz Avenue

The Hardshell Cafe has formed a partnership with OARC to build a fourth location for their restaurant on the 7100 block of Ogontz Avenue. The total project cost was \$800,000. The City of Philadelphia helped to finance the project through a \$450,000 low-interest loan. The restaurant opened in April 1997.

Southeastern Pennsylvania Regional Employment and Training Center

This \$7.4 million major construction project is a regional employment and training facility on a 4.5 acre site located within an Urban Renewal Area in West Oak Lane. The design entailed immediate renovation to an existing 65,000 sq. ft. facility in order to house a manufacturing enterprise training program called the Philadelphia Area Accelerated Manufacturing Education, Inc. (PhAME). PhAME is comprised of Crown, Cork, & Seal, Delaware Valley Industrial Resource Center (DVIRC), Community College of Philadelphia, OARC, the Philadelphia Board of Education, and Lehigh University. Additional land was developed to accommodate future program expansion, additional parking, and landscaped green space.

Development Projects In Progress

West Oak Lane Charter School

In February, 1998, OARC was awarded a charter by the Philadelphia Board of Education to open a charter school in September serving 600 children, grades K-5. OARC is establishing the school in conjunction with the Edison Project, which will provide the instructional and operational support for the school. The Edison Project is a private, nationally known school management company which currently operates twenty five public schools enrolling approximately 13,000 students. The school will provide a model of collaboration among families, students and the community for the betterment of public education. Some of the features of the school include an ambitious, standards-based curriculum incorporating best practices from across the nation, a longer school day and school year, extensive use of computer technology, extensive opportunities for parent involvement, and instruction in Spanish for all children beginning in Kindergarten.

THE SCHOOL DISTRICT OF PHILADELPHIA
Opening Remarks from Board President Floyd W. Alston
Public Hearing on 1998-99 Charter School Applications
December 3, 1997 at 9:00 am

I'd like to make some opening remarks before we begin the first public hearing on 1998-99 charter school applications in Philadelphia.

Pennsylvania is the 27th state in the nation to have approved charter school legislation. And while charters hold significant promise as models for how public schools can work, we remain very concerned about the serious flaws in Pennsylvania's law that could compromise the ability of the District to serve all of Philadelphia's public school students.

Last July, Philadelphia conducted the first public hearing in Pennsylvania on charter schools since the law was signed by Governor Ridge on June 19, 1997. This past August, only four months ago, Philadelphia became the most charter-friendly school district in Pennsylvania by approving four charter schools to begin operation this past September. And now, less than three months after the opening of the first four charter schools in Philadelphia, we are embarking on our second annual review of applications for 1998-99. As Superintendent David Hornbeck has said many times over the past year, charter schools are not a threat to the School District of Philadelphia, but an opportunity. The underlying philosophy of charter schools is fully aligned with our own systemic reform agenda, Children Achieving - community involvement, public accountability for student achievement, high standards for all students, and local flexibility to design innovative educational programs.

The enormous time and energy we have devoted to the charter school initiative is testimony to our deep support for charter schools. Philadelphia is home to four of the six charter schools that currently exist in the Commonwealth of Pennsylvania, and Philadelphia's four charter schools enroll more than 90% of the state's charter school students.

However, as I mentioned, we have embarked upon this task despite the very real financial impact on the School District. The District's approval of the existing four charter schools has cost the District an additional \$2.4 million this year. And, even if we didn't approve any more charter schools this year, that net loss to the District will increase to \$6 million next year.

You probably are more aware than most citizens of the financial plight of the District. The flaws in the charter school law that increase the financial burden of this District make it even clearer that the state has to be fair to all of our children, not just those who attend charter schools.

With that said, I'd like to take this opportunity to remind those of you gathered here today of a few key provisions of the state charter school law that, as a local school board, we are obligated to uphold -

- According to the state law, charter schools are independent from the School District once they are approved. Once approved, it is as if you are your own school district, and with this freedom comes much responsibility. Each applicant should be prepared for this reality.
- According to the state law, we cannot approve any charter school application sooner than 45 days or later than 75 days after the first public hearing. Approval must occur at a formal Board meeting. We take very seriously our responsibility to review these applications and given the volume we have this year, we have scheduled our formal decision for our February 9th Board meeting.
- According to state law, the School District makes equal monthly payments to charter schools for every student enrolled. The law does not empower us, nor does the School District have, the resources to provide charter schools with start-up funds.
- According to state law, every employee of a charter school must be provided with the same health and retirement benefits as if he or she were an employee of the School District. Employee benefit information has been provided in your

application packets and the staff is available to assist you with additional information.

- According to state law, at least 75% of the professional staff members of a charter school must hold appropriate state certification. Local school boards have no authority to waive this requirement.
- The District is required to provide transportation to charter school students on the same basis as we provide services to other public school students. The District does not provide bus transportation to students who elect to go to schools other than their neighborhood school with the exception of some special education students. Therefore, charter school students are not eligible for transportation, again with the exception for special education students.
- While charter schools are not subject to all of the state and federal laws and regulations that the School District of Philadelphia is subject to, the state charter law does reference several state and federal laws which the charter school must still comply with. For further information about these laws, approved applicants should contact the state and federal authorities.
- Finally, the state has not yet drafted what it calls Rules and Regulations for implementation of the charter school law. Until we receive further guidance from the state in the form of Rules and Regulations, we will use common sense and collaborative problem-solving with approved applicants to answer any questions or concerns that may arise about implementation and operation of charter schools. Our first and foremost decision-rule will always be — what is best for the children?

Having reviewed some of the key provisions of the law, I now want to highlight some of the key questions the Board will be considering as we review your applications. Essentially, in evaluating applications, the Board will consider the following:

- a) Has the applicant fulfilled the legal and technical requirements of the authorizing legislation and Philadelphia's own 1998-99 application guidelines?

- b) Has the applicant proposed a unique educational program that is best fulfilled through the charter school model?
- c) Has the applicant demonstrated a "readiness to operate" in 1998-99? To determine readiness, we will consider factors such as:
- demonstrated financial and business viability of the proposed school,
 - demonstrated broad-based community support of and ongoing involvement in the proposed school,
 - the ability to offer rigorous instruction that reflects world-class standards for students of all abilities,
 - adequate and appropriate governance and management structures, and
 - an understanding of and ability to meet stringent accountability for improved student achievement.

With those questions in mind, we will now officially begin the presentations from the applicants. Each applicant will have a total of 10 minutes to present. If time permits and members of the audience who would like to provide testimony on the application, they may do so after the presentation has been completed. Overall, however, we will be limiting the discussion of each application to a total of 10 minutes for this first public hearing. The Board of Education will not be hearing testimony on any other topics today.

[First applicant is called. . .]

THE SCHOOL DISTRICT OF PHILADELPHIA

BOARD OF EDUCATION

21ST STREET S. OF THE PARKWAY

PHILADELPHIA, PENNSYLVANIA 19103-1099

RECEIVED

OFFICE OF THE MANAGING DIRECTOR

COPY

TELEPHONE (215) 299-7833
FAX (215) 299-7604
FAX (215) 299-4687

June 5, 1998

Ms. Andrea Thomas-Reynolds
West Oak Lane Charter School
OARC
7178 Ogontz Avenue
Philadelphia, PA 19138

Dear Mrs. Thomas-Reynolds:

It has come to our attention that OARC has decided not to partner with the Edison Project to develop the West Oak Lane Charter School. OARC's charter school application was approved by the Board of Education on that representation and the embedded ones regarding Edison's school design, curricula, instructional models, philosophy, and financing. If the proposed relationship among OARC, the Edison Project, and LaSalle University has changed, you must notify the Board of Education immediately, providing a detailed description of the change and the bearing it has on the charter application.

Please respond no later than June 12, 1998 to Mrs. Christine James-Brown, Member of the Board of Education and send a copy to me at the School District of Philadelphia, Administration Building, Room 228, 21st Street South of the Parkway, Philadelphia, PA 19103. If you have any questions, I can be reached at 215-299-4671.

Very truly yours,

Faye A. Wilson

Faye A. Wilson
Administrative Assistant

cc: Christine James-Brown
Germaine Ingram

June 18, 1998

Ms. Germaine Ingram
Chief of Staff
The School District of Philadelphia
Board of Education
21st Street S. of the Parkway
Philadelphia, PA 19103-1099

RE: West Oak Lane Charter School Update

Dear Ms. Ingram:

The West Oak Lane Charter School has made modifications to its original application that was approved by The School District of Philadelphia Board of Education in February 1998. As stated in a letter delivered to the School District by noon on June 12, 1998 required by Christine James-Brown, the primary change in the school has been the replacement of The Edison Project with Drexel University/Foundations Technical Assistance Center for Public Charter Schools.

The West Oak Lane Charter School is planning to secure financing to assist with the initial start-up costs needed to prepare the school for opening in September 1998. Our lender has become aware of the letter submitted by the School District to the West Oak Lane Charter School indicating your requirement to determine whether or not there has been a material change in the programmatic scope and operational commitments set forth in our November 17, 1997 application to the School District. Therefore, we can not continue to move forward with critical start-up activities without a letter from the School District documenting approval of the changes to the school..

After receiving the June 8, 1998 letter requesting that the West Oak Lane Charter School provide information on the changes, this information was submitted to the School District. Because the letter did not state specifically what the School District would need to make its decision, we did not know how much information to include. Nevertheless with your most recent memo, several questions have been identified as needing clarity by the School District to assess the impact and determine whether or not there has been a material change in program or operations that will adversely affect the charter.

The following points respond to each of your questions:

1. How does the West Oak Lane Charter School propose to replace the \$1.5 million in start-up funds that would have been provided by the Edison Project?

*As stated in the original application, the Edison Project was providing approximately \$1.5 million in start-up investment that was to **be repaid with interest** through the operations of the West Oak Lane Charter School (WOLCS) over a five-year period. This investment was to be used to cover the following:*

- a. pre-opening operating expenses (i.e. hiring of administrative staff, professional development of staff, travel, office rent, supplies, advertising, etc.)*
- b. pre-opening professional development costs, (travel costs associated w/ Edison's Leadership Training)*
- c. pre-opening curriculum capital and library cost,*
- d. facility improvements (i.e. technology wiring and furniture upgrade in school site), and*
- e. technology investments (i.e. school computers and home computer technology for students in the third grade and above beginning in year two of school operations).*

Instead of using the Edison Project to obtain such financing, the West Oak Lane Charter School will utilize the assistance of its developing sponsor, the Ogontz Avenue Revitalization Corporation (OARC), who will help in securing the financing needs for the school from viable resources. Over the past fifteen years, OARC has been able to obtain over 17 million dollars in financing support to help projects initiated by the organization from foundations, public, and private sector support. The same will hold true for our commitment to the West Oak Lane Charter School.

Because the school will not be using the resources of the Edison Project, it is anticipated that the costs of using the investment dollars (interest fees) will be substantially lower. Therefore, the financing arrangements through the Ogontz Avenue Revitalization Corporation for the West Oak Lane Charter School will be used to replace the funds that the Edison Project was originally going to provide.

Also, because the school will not be paying management fees to Edison as originally projected between 8% and 12% of the total budget, these dollars will be used to support the costs of technology wiring and computer purchases. As with Edison, OARC will arrange for financing for these activities to be repaid through the operating budget for the school. OARC has been negotiating with several financing institutions and are presently analyzing which sources will be more advantageous for the school. Nevertheless, financing for the school computers will be for a term not to exceed 5 years consistent with the depreciable life of the computer assets. OARC, through the assistance of Foundations, is

evaluating different computer and technology wiring proposals that will encompass the current and future needs of the school.

The pre-opening operating expenses and pre-opening professional development expenses will be supported through the start-up funds from the Pennsylvania State Department of Education. OARC may borrow funds to support these activities, but as with Edison, such funds will be repaid through the operating budget of the school. OARC has also been negotiating with financial institutions regarding furniture purchases that will also be repaid as the other start-up activities.

- 2. If you intend to borrow funds to replace the Edison Project commitment, state the amount and term of any debt you plan to incur, and state the source of collateral and repayment?**

To assist with immediate start-up needs, the OARC has negotiated a bridge loan with the Delaware Valley Community Reinvestment Fund (DVCRF) to assist with the needs of the school. On Friday, June 19, 1998, OARC/WOLCS will borrow a short-term loan in the amount of \$225,000 from DVCRF to be repaid by September 1998. Because of the student enrollment projection for the school, the WOLCS anticipates receiving \$438,400 in start-up support. The terms of the short-term bridge loan are at an interest rate not to exceed 8.5% secured by the start-up funds to be repaid by September 30, 1998. As the WOLCS receives the start-up capital from the state, this will be used to repay the bridge loan to DVCRF.

For any funds obtained through OARC to assist the school that exceed the start-up dollars provided by the Pennsylvania State Department of Education, the West Oak Lane Charter School will repay this investment to OARC through the operating budget of the school. Once again, this is consistent with the manner identified in the November 17, 1997 application except that this function of the Edison Project has now been replaced by OARC.

In addition to DVCRF, OARC has initiated talks with First Union National Bank, Prudential, Equi-Mor Holdings, and Matrix Capital. These financial institutions are anxiously awaiting our final proposal to finance the furniture, computer, and technology needs to be secured by the items being financed.

- 3. What are the components to the curriculum and instructional program the school will use? Who developed the curriculum and program? How, if at all, do the curriculum and program differ from the Edison Project curriculum and program referred to in the application?**

The West Oak Lane Charter School has planned to adhere to and extend the curriculum for each discipline stated in the original application. As opposed to Edison negotiating the contractual services from the various curriculum developers, Foundations will assist with and facilitate this task. The Edison

Project did not develop curriculum, but rather over the last three to five years has researched extensively best practice educational models around the country.

To date we have been in contact with Bob Slavin, John Hopkins University to evaluate the purchase of the Success for All program. Foundations is currently negotiating prices. It is our intent to pay for the school curriculum and its accompanying professional development through the operating budget of the school.

The West Oak Lane Charter School recognizes that children learn in different ways; therefore, the school will use several broad instructional strategies. The instructional approaches that will be used are direct instruction, project based/experiential learning, cooperative learning/community service, and individual study. The WOLCS will retain all the curriculum previously indicated in the original application as detailed below:

Language Arts/ Literacy - *The curriculum provides for instruction in reading, and language arts, including speaking, writing, viewing, and listening. The School will utilize the Success for All reading program developed by John Hopkins University and A Handbook for Young Writers, Thinkers, and Learners.*

Mathematics – *WOLCS will utilize the University of Chicago Mathematics Project (UCSMP) materials. The program emphasizes the development of conceptual, computational, and problem solving skills through a variety of hands on activities and projects.*

Social Studies – *This curriculum will provide instruction through a variety of broad based multi-cultural themes including folk tales, myths, legends, biographies, poetry, non-fiction, and historical fiction. In grades K-2, the program focuses on people, cultures, and ideas. In grades 3 – 5, the theme is “dinosaurs to discovery”, with an emphasis on the idea of place. The social studies curriculum will emphasize the natural sciences, history, and geography through technology as a tool to learning.*

Science – *The curriculum provides for science instruction using the Science for Life and Living Program (Kendall/Hunt Publishing). This program uses the constructivist method designed by the Biological Sciences Curriculum Study (BSCS) group, emphasizing “hands on experiences” in the development of scientific hypothesis and the conduct of experiments and observation. Instruction will be supported with a variety of print, video, and computer based media.*

Technology – *The WOLCS will have a media center and a computer network in every classroom. Teachers will receive either a laptop computer or personal computer (for classroom use only). Beginning in the fall of 1999, it is anticipated that each student in grade 3 and above will receive a computer in his/her home, networked to the school via telephone modem. In cases where more than one child*

per household are students of the WOLCS, only one computer per home will be provided.

World Languages – All students will receive instruction in Spanish, beginning in Kindergarten. The school will utilize *Amigos: Spanish as a Second Language* (Rei America) as its basic world language text.

Visual and Performing Arts – All students will receive instruction and enriching experiences in the visual and performing arts, including music, dance, and drama. The core programs for these disciplines are *Learning to Look and Create* (Dale Seymour Publications) and *The Music Connection* (Silver Burdett, Ginn).

Health and Physical Education – The curriculum will provide instruction in health and physical fitness for all students. The core program will utilize *Health for Life* (Scott Foresman).

Character and Ethics - All students will utilize Heartwood Institute's Character and Ethics Program and/or the Developmental Studies Program (Eric Schaps).

As stated in the June 12, 1998 letter, the school will provide for the following:

- *full-day kindergarten*
- *a longer school day and year*

(September 15, 1998 – June 30, 1999) – minimum of 190 days
(September 7, 1999 – June 30, 2000)
8:00 AM – 3:30 PM

- *the use of proven instructional and best practices programs*
- *extensive use of technology (media center and computers for the children)*
- *instruction in Spanish at all grade levels.*

4. Who will be responsible for the recruitment, professional development, and evaluation of the staff?

In the original application, representatives from the West Oak Lane Charter School Board of Trustees and the Edison Project arranged a joint selection of the principal. Once the principal is selected, this person would then have the opportunity to select his/her own staff with assistance from the Edison Project in screening candidates. The same process and procedure will continue; however, this function of the Edison Project has been replaced by Drexel University/Foundations Technical Assistance Center. The Board of Trustees and key members of Foundations (i.e. Rhonda Lauer, Chief Executive Officer, and

Phil Esbrandt, Executive Director) have been Foundations' representatives in facilitating the interviews for principal candidates.

Since February 1998, OARC has been actively recruiting principal, teaching, and other administrative staff to supply a pool of viable candidates as potential employees. OARC/Foundations are conducting final interviews for the principal on Saturday, June 20, 1998 and will make a final recommendation to the WOLCS Board at its June 22, 1998 board meeting. In addition, OARC has obtained over 140 resumes for teaching and key administrative staff positions. Janie Harris, administrative consultant with Foundations is assisting the WOLCS in pre-screening candidates to provide a viable list of final candidates for the principal to interview and recommend for hire to the Board of Trustees. Ms. Harris has over thirty years of experience as an administrator and instructional leader in the School District of Philadelphia.

Professional development for the staff of the school will be conducted by Foundations. The targeted dates for professional development have been changed to August 10 – 30, 1998. Foundations has over 40 consultants with exemplary experience in all areas of professional development.

What is their background and experience in performing these functions?

Foundations' core staff has over one hundred years of combined experience in school and school system administration, curriculum development, professional development, business and finance management, leadership training, and school improvement. (See attached resumes).

How, if at all, will the school's staff evaluation system differ from the evaluation program developed by the Edison Project?

The school's staff will be evaluated in concert with the Pennsylvania State Department process utilizing all state forms. Additionally, a complete Performance Appraisal System utilizing quarterly formal observations and staff/principal conferences will be implemented as an ongoing and continuous accountability measure.

During the regularly scheduled parent/teacher conferences, a "parent compact", constituting a commitment of both the school and the home will serve as an evaluative tool. This is consistent with the quarterly learning contract identified in the November 17, 1997 application submitted to the School District.

5. How and by whom will the business and personnel operations of the school be performed?

The WOLCS will hire a business manager with an extensive accounting background. Foundations' Chief Financial Officer, Mark Spector, will assist this individual. Mr. Spector has over twenty-seven years of experience in school business operations, finance, and human resources. Mr. Spector will also facilitate the development of a personnel and policies procedures manual.

What is the background and experience of the people or entity that will replace Edison Project in performing these functions?

See attached resumes.

6. How and by whom will the maintenance and operation of the school facility be performed?

WOLCS will employ two maintenance personnel. However, the Ogontz Avenue Revitalization Corporation will monitor the operations of the school facility. Currently, OARC is remodeling the abandoned commercial space located at the corner of Stenton Avenue and Washington Lane, which will serve as the school facility. OARC will monitor the property management activities of the school.

What is the background and experience of the people or entity that will replace the Edison Project in performing these functions?

OARC has over fifteen years experience in developing and monitoring commercial facilities. The school site will be approximately 40,440-sq. ft. in year one an increase to 47,000 sq. ft. in year two as adjacent space is acquired. OARC's experience includes ten years of property management experiences including the following commercial developments:

- *Ogontz Plaza - (retail shopping center) 30,000 sq. ft.*
- *Southeastern Pennsylvania Regional Employment & Training Center (a manufacturing educational facility) 69,000 sq. ft*
- *NIA Center (a multi-purpose community center) 15,000 sq. ft.*
- *Hardshell Café (restaurant) – 6,500 square ft*

See OARC Summary of Services and Project Development Chart for organizational capacity.

7. Describe the student assessment system that the school will use and how it differs from the assessment system endorsed by the Edison Project and contained in your application?

The student assessment system will remain consistent with that described in the original application. It will include the following:

- *A review of student performance data including assessments required by the School District of Philadelphia and the Commonwealth of Pennsylvania for public school students and data from supplemental assessments conducted by Foundations in conjunction with the WOLCS staff*
- *A review of customer satisfaction surveys of students (in grades 3 and above), parents and staff members, utilizing nationally recognized commercial surveys and surveys developed by the staff in conjunction with Foundations*

Students will participate in the Pennsylvania System of School Assessment (PSSA) and will complete those standardized tests required of students in the School District of Philadelphia. Beyond standardized tests, students will participate in an assessment program that includes:

- *Individual portfolios*
- *Success for All assessment materials*
- *University of Chicago assessment materials*
- *Teacher administered tests.*

8. By whom will the principal be selected and to whom will he/she report?

The principal will be interviewed by a joint committee composed of key representatives from Foundations and the WOLCS Board of Trustees, including parent representation. This committee will make a recommendation to the full WOLCS Board of Trustees for final hiring on June 22, 1998. The principal will report to the Board of Trustees and will make monthly presentations, with assistance from Foundations, on the operations, finances, and student achievement within the school.

9. Will the school conduct an annual survey of parents, and if so, who will develop and conduct the survey?

See response to question #7

- 10. In addition to your response to Question #1, are there any other ways that the withdrawal of the Edison Project will have financial consequences for the operations of the school? If so, explain concretely what those consequences are?**

Edison was going to receive approximately \$331,000 from the operating budget of the school for the duration of the charter to cover its original start-up investment and its management fees. The WOLCS' decision to discontinue the partnership with the Edison Project has resulted in these funds now being available to finance the furniture, technology, computer, and curriculum costs for the school. These funds in turn will have a direct positive impact on our students and classrooms.

- 11. Are there any other ways, other than what you have stated in response to Questions # 1 - #10, that your plans for the program and operations of the school differ from what is stated in your application you filed with the School District on November 17, 1997?**

In our original application, the West Oak Lane Charter School indicated that the projected student enrollment would be 600 students in year one serving grades (K-5) and increasing by one grade each year (100 students).

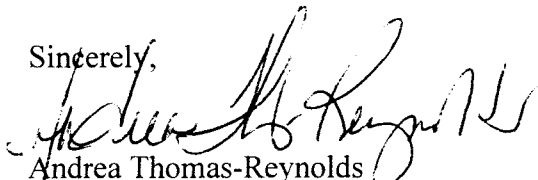
Because of facility constraints, the school will begin as a K-4 school accommodating 548 students in year one. In year two, the school will expand to K-5 and increase to 600 students as adjacent space is acquired. Over the next two years, OARC will develop a site for the middle school (grades 6-8) with 100 students in each grade.

- 12. Contact person who is able to provide the reason for the severance of the relationship between OARC and the Edison Project.**

*Stephen Tracy, Vice-President
The Edison Project
Director of Northeast Development
860-355-4380*

Thank you so much for your timely response to these issues. We appreciate the fact that you have agreed to provide the necessary documentation we must acquire by this afternoon to complete our loan closing.

Sincerely,



Andrea Thomas-Reynolds
Executive Director, OARC

CC: Floyd W. Alston
Christine James-Brown
Sharmain Matlock-Turner
PA State Representative Dwight Evans
Rhonda Lauer

THE SCHOOL DISTRICT OF PHILADELPHIA

BOARD OF EDUCATION

21ST STREET S. OF THE PARKWAY

PHILADELPHIA, PENNSYLVANIA 19103-1099

RECEIVED

JUL 10 1998

FINANCIAL SERVICES

TELEPHONE (215) 299-7243
FAX (215) 299-7573

July 8, 1998

Ms. Andrea Thomas-Reynolds
West Oak Lane Charter School
7178 Ogontz Avenue
Philadelphia, PA 19138

Dear Ms. Thomas-Reynolds:

Last week the School District learned that the Commonwealth of Pennsylvania had changed the method used to calculate funding for charter schools. Recognizing that charter schools are independent schools, and as such, qualify as LEAs, you are able to apply for federal funding from programs for which you qualify. Accordingly, the new state formula provides for the deduction of expenditures of federal funds for purposes of determining the per pupil allocation to charter schools.

Consistent with the new formula, funding to charter schools in Philadelphia will be reduced by \$279 per student to \$5,246 for regular students, and by \$269 to \$9,731 for special education students for Fiscal Year 1998-99. We have been assured by state and federal officials that procedures are being developed to ensure that charters will be able to apply for and access federal funds for which they are eligible.

We realize that this reduction in the per pupil funding may necessitate revisions to your budget and programs. In order to reduce the impact of the reduction, the School District is providing immediate assistance in the form of a transition supplement, calculated on the basis of \$23 per student, for the month of July. This supplement should provide some financial relief while you evaluate the budgetary and programmatic impact of the formula change and pursue federal funding through procedures being devised by the state and federal authorities.

The Board of Education will be meeting to consider whether there are other ways that the School District can help you accommodate the consequences of the State's new formula.

Please feel free to contact us if you have questions.

Very truly yours,



Gerald L. Santilli
Executive Director

GLS/kl



Drexel University/FOUNDATIONS

Technical Assistance Center for Public Charter Schools (TAC)

The Drexel University/FOUNDATIONS Technical Assistance Center for Public Charter Schools was created to assist those involved in the development of public charter and "new" schools to attain *their* goals, be accountable for student achievement, and form partnerships with charter and other public schools. The TAC's goals are to increase the viability of charter and other schools of choice, and to stimulate improvements in the broader public educational system that will ultimately improve achievement for all public school students. To this end, the TAC deploys teams of experts who provide hands-on technical assistance and consultation to those who are considering, planning, or operating public charter schools in the mid-Atlantic region.

Since 1997, the TAC has assisted 30 Pennsylvania groups and two New Jersey groups in one or more phases of planning, obtaining state planning grants, applying for charters, preparing to open, and operating charter schools. The TAC's three national conferences have attracted participants from across the country. Our most recent conference, April 15-17, 1998, explored the critical issue of accountability and included participants from 18 states, the District of Columbia, and Puerto Rico.

Drexel University/FOUNDATIONS
Technical Assistance Center for Public Charter Schools

Philip Esbrandt
Executive Director

Drexel University, School of Education
33rd and Chestnut Streets
Philadelphia, PA 19104
Tel: 215-895-6770

FOUNDATIONS, Inc.
821 East Gate Drive
Mt. Laurel, NJ 08054
Tel: 609-727-8000

Drexel University/FOUNDATIONS Inc.
Technical Assistance Center for Public Charter Schools

Re: Fee Analysis based on Services for West Oak Lane Charter School

Date: May 28, 1998

Description of Service	Prior to School Opening	During First Year
	\$	\$
1. Business Package (all) <i>plus</i> acquisition of furniture and materials, assisting with hiring of business manager, establishing food service program, developing and implementing system for monthly reporting to board and principal	1,800 4,950	4,500 0
2. Community, etc. Package (partial) <i>plus</i> assisting in planning for latest student registration, developing lottery procedures and overseeing lottery, coordinating enrollment procedures with principal (when hired), developing school/home and school/community community and public relations plan for the first year.	2,250 4,500	0 2,250
3. Curriculum & Professional Development (all) <i>plus</i> researching and identifying curriculum packages and preparing report summaries (June 5 and June 30), designing assessment procedures and conducting staff orientation sessions, and monitoring implementation and effectiveness during the first year	15,750 2,700	1,800 13,500
4. Grantwriting and Fundraising Package (none)	0	0
5. Governance Package (partial) <i>plus</i> developing written policies and procedures for board operation, preparing initial staff policy manual, school handbook for students and parents, and follow-up revisions in first year, attending board and staff meetings, preparing and conducting training and orientation sessions for principal and board	2,700 6,750	0 4,500

Drexel University/FOUNDATIONS Inc.
Technical Assistance Center for Public Charter Schools

Description of Service	Prior to School Opening	During First Year
6. Human Resources Package (all) <i>plus</i> assisting in screening and interviewing principal and teacher candidates, checking backgrounds, assessing teacher backgrounds for professional development needs, designing organizational structure of school, drafting master schedule for principal's consideration, developing office procedures and selecting finalists for office manager/administrative assistant position	6,750 6,750	2,250 0
7. Legal Services Package (none)	0	0
8. On-going Assessment of School Progress (all) <i>plus</i> planning for second-year expansion to K-5 school	1,800	3,600 4,500
9. Real Estate/Facilities (none)	0	0
10. Security, Health, and Safety Package* <i>to consist of</i> reviewing facilities for traffic flow, recommending internal traffic patterns, assessing internal security, monitoring facilities during off hours, designing a plan for coordina- tion between principal and contractors	* 5,850*	* 1,800*
11. Special Education (all)	4,500	2,250
12. Technology Support Package (all) <i>plus</i> developing multiple phases of technology plan to coordinate with curriculum and budgetary constraints, coordinating curriculum and computerized assessment system, recommending purchases and setting up procedures	4,500 2,700	2,250 0

Drexel University/FOUNDATIONS Inc.
Technical Assistance Center for Public Charter Schools

Description of Service	Prior to School Opening	During First Year
13. Additional Items <i>to consist of attending board meetings, reviewing and writing parts of charter application (e.g., calendar, school day schedule, program and staffing design), providing on-site administrator to coordinate educational issues, work with parents, and orient new principal, advising, writing reports, and meeting regularly with principal and board to plan adjustments prior to school opening and during first year</i>	15,300**	18,000
	83,700	59,400

Any further additions to this schedule will be discussed with the appropriate representative of the West Oak Lane Charter School. If approved, these additional services will be billed at the rate of \$450 per person per day plus expenses.

Total Projected Fee for Service	<u>\$143,100</u>
Discounted Fee for Service including First Year Services, including Advice and Counsel	<u>\$125,000</u>

* Recommended services that were not discussed and which are not included in current totals

**Includes a maximum of \$11,250 for interim on-site administrator

INTERNAL REVENUE SERVICE
DISTRICT DIRECTOR
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

JUL 17 1998

WEST OAK LANE CHARTER SCHOOL
C/O SHARMAIN MATLOCK TURNER
7178 OGONTZ AVE
PHILADELPHIA, PA 19138

Employer Identification Number:

23-2946223

DLN:

17053132023038

Contact Person:

D. A. DOWNING

Contact Telephone Number:

(513) 241-5199

Accounting Period Ending:

June 30

Form 990 Required:

Yes

Addendum Applies:

Yes

RECEIVED
JUL 23 1998

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in sections 509(a)(1) and 170(b)(1)(A)(ii).

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. In the case of an amendment to your organizational document or bylaws, please send us a copy of the amended document or bylaws. Also, you should inform us of all changes in your name or address.

As of January 1, 1984, you are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more you pay to each of your employees during a calendar year. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, if you are involved in an excess benefit transaction, that transaction might be subject to the excise taxes of section 4958. Additionally, you are not automatically exempt from other federal excise taxes. If you have any questions about excise, employment, or other federal taxes, please contact your key district office.

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

Letter 947 (DO/CG)

WEST OAK LANE CHARTER SCHOOL

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

Contribution deductions are allowable to donors only to the extent that their contributions are gifts, with no consideration received. Ticket purchases and similar payments in conjunction with fundraising events may not necessarily qualify as deductible contributions, depending on the circumstances. See Revenue Ruling 67-246, published in Cumulative Bulletin 1967-2, on page 104, which sets forth guidelines regarding the deductibility, as charitable contributions, of payments made by taxpayers for admission to or other participation in fundraising activities for charity.

In the heading of this letter we have indicated whether you must file Form 990, Return of Organization Exempt From Income Tax. If Yes is indicated, you are required to file Form 990 only if your gross receipts each year are normally more than \$25,000. However, if you receive a Form 990 package in the mail, please file the return even if you do not exceed the gross receipts test. If you are not required to file, simply attach the label provided, check the box in the heading to indicate that your annual gross receipts are normally \$25,000 or less, and sign the return.

If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. A penalty of \$20 a day is charged when a return is filed late, unless there is reasonable cause for the delay. However, the maximum penalty charged cannot exceed \$10,000 or 5 percent of your gross receipts for the year, whichever is less. For organizations with gross receipts exceeding \$1,000,000 in any year, the penalty is \$100 per day per return, unless there is reasonable cause for the delay. The maximum penalty for an organization with gross receipts exceeding \$1,000,000 shall not exceed \$50,000. This penalty may also be charged if a return is not complete, so be sure your return is complete before you file it.

You are required to make your annual return available for public inspection for three years after the return is due. You are also required to make available a copy of your exemption application, any supporting documents, and this exemption letter. Failure to make these documents available for public inspection may subject you to a penalty of \$20 per day for each day there is a failure to comply (up to a maximum of \$10,000 in the case of an annual return).

You are not required to file federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T, Exempt Organization Business Income Tax Return. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

WEST OAK LANE CHARTER SCHOOL

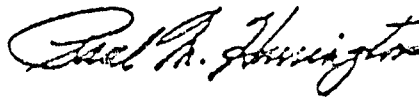
You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

If we have indicated in the heading of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

A handwritten signature in cursive script, appearing to read "Paul A. Harrington".

District Director

Enclosure(s):
Addendum

WEST OAK LANE CHARTER SCHOOL

Guidelines under which private foundations may rely on this determination, for gifts, grants, and contributions made after March 13, 1989, were liberalized and published in Rev. Proc. 89-23, Cumulative Bulletin 1989-1, page 844.

Since you receive more than 50% of your support from government sources, you are a "public school" as defined in the Civil Rights Act. Accordingly, you are not subject to the specific publishing, reporting, and recordkeeping requirements of Rev. Proc. 75-50, 1975-2 C.B., page 587. If your income sources change, to the extent you are no longer primarily supported by the government, you will be subject to these requirements. Failure to comply with these requirements at that time can have an adverse effect on your exempt status.

This final determination letter is being issued without review of the conformed copy of the amendment to your organizing document that you have agreed to file with your Secretary of State's office, and provide a copy to the Internal Revenue Service.

Charitable Contributions - Substantiation and Disclosure Requirements

UNDER THE NEW LAW, CHARITIES WILL NEED TO PROVIDE NEW KINDS OF INFORMATION TO DONORS. Failure to do so may result in denial of deductions to donors and the imposition of penalties on charities.

Legislation signed into law by the President on August 10, 1993, contains a number of significant provisions affecting tax-exempt charitable organizations described in section 501(c)(3) of the Internal Revenue Code. These provisions include: (1) new substantiation requirements for donors, and (2) new public disclosure requirements for charities (with potential penalties for failing to comply). Additionally, charities should note that donors could be penalized by loss of the deduction if they fail to substantiate. **THE SUBSTANTIATION AND DISCLOSURE PROVISIONS APPLY TO CONTRIBUTIONS MADE AFTER DECEMBER 31, 1993.**

Charities need to familiarize themselves with these tax law changes in order to bring themselves into compliance. This Publication alerts you to the new provisions affecting tax-exempt charitable organizations. Set forth below are brief descriptions of the new law's key provisions. The Internal Revenue Service plans to provide further guidance in the near future.

Donor's Substantiation Requirements

Documenting Certain Charitable Contributions. — Beginning January 1, 1994, no deduction will be allowed under section 170 of the Internal Revenue Code for any charitable contribution of \$250 or more unless the donor has contemporaneous written substantiation from the charity. In cases where the charity has provided goods or services to the donor in exchange for making the contribution, this contemporaneous written acknowledgement must include a good faith estimate of the value of such goods or services. Thus, taxpayers may no longer rely solely on a cancelled check to substantiate a cash contribution of \$250 or more.

The substantiation must be "contemporaneous." That is, it must be obtained by the donor no later than the date the donor actually files a return for the tax year in which the contribution was made. If the return is filed after the due date or extended due date, then the substantiation must have been obtained by the due date or extended due date.

The responsibility for obtaining this substantiation lies with the donor, who must request it from the charity. The charity is not required to record or report this information to the IRS on behalf of donors.

The legislation provides that substantiation will not be required if, in accordance with regulations prescribed by the Secretary, the charity reports directly to the IRS the information required to be provided in the written substantiation. At present, there are no regulations establishing procedures for direct reporting by charities to the IRS of charitable contributions made in 1994. Consequently, charities and donors should be prepared to provide/obtain the described substantiation for 1994 contributions of \$250 or more.

There is no prescribed format for the written acknowledgement. For example, letters, postcards or computer-generated forms may be acceptable. The acknowledgement does not have to include the donor's social security or tax identification number. It must, however, provide sufficient information to substantiate the amount of the deductible contribution. The acknowledgement should note the amount of any cash contribution. However, if the donation is in the form of property, then the acknowledgement must describe, but need not value, such property. Valuation of the donated property is the responsibility of the donor.

The written substantiation should also note whether the donee organization provided any goods or services in consideration, in whole or in part, for the contribution and, if so, must provide a description and good-faith estimate of the value of the goods or services. In the new law these are referred to as "quid pro quo contributions."

Please note that there is a new law requiring charities to furnish disclosure statements to donors for such quid pro quo donations in excess of \$75. This is addressed in the next section regarding Disclosure By Charity.

If the goods or services consist entirely of intangible religious benefits, the statement should indicate this, but the statement need not describe or provide an estimate of the value of these benefits. "Intangible religious benefits" are also discussed in the following section on Disclosure By Charity. If, on the other hand, the donor received nothing in return for the contribution, the written substantiation must so state.

The present law remains in effect that, generally, if the value of an item or group of like items exceeds \$5,000, the donor must obtain a qualified appraisal and submit an appraisal summary with the return claiming the deduction.

The organization may either provide separate statements for each contribution of \$250 or more from a taxpayer, or furnish periodic statements substantiating contributions of \$250 or more.

Separate payments are regarded as independent contributions and are not aggregated for purposes of measuring the \$250 threshold. However, the Service is authorized to establish anti-abuse rules to prevent avoidance of the substantiation requirement by taxpayers writing separate smaller checks on the same date.

If donations are made through payroll deductions, the deduction from each paycheck is regarded as a separate payment.

A charity that knowingly provides false written substantiation to a donor may be subject to the penalties for aiding and abetting an understatement of tax liability under section 6701 of the Code.

Disclosure by Charity of Receipt of Quid Pro Quo Contribution

Beginning January 1, 1994, under new section 6115 of the Internal Revenue Code, a charitable organization must provide a written disclosure statement to donors who make a payment, described as a "quid pro quo contribution," in excess of \$75. This requirement is separate from the written substantiation required for deductibility purposes as discussed above. While, in certain circumstances, an organization may be able to meet both requirements with the same written document, an organization must be careful to satisfy the section 6115 written disclosure statement requirement in a timely manner because of the penalties involved.

A quid pro quo contribution is a payment made partly as a contribution and partly for goods or services provided to the donor by the charity. An example of a quid pro quo contribution is where the donor gives a charity \$100 in consideration for a concert ticket valued at \$40. In this example, \$60 would be deductible. Because the donor's payment (quid pro quo contribution) exceeds \$75, the disclosure statement must be furnished, even though the deductible amount does not exceed \$75.

Separate payments of \$75 or less made at different times of the year for separate fundraising events will not be aggregated for purposes of the \$75 threshold. However, the Service is authorized to develop anti-abuse rules to prevent avoidance of this disclosure requirement in situations such as the writing of multiple checks for the same transaction.

The required written disclosure statement must:

- (1) inform the donor that the amount of the contribution that is de-

ductible for federal income tax purposes is limited to the excess of any money (and the value of any property other than money) contributed by the donor over the value of goods or services provided by the charity, and

- (2) provide the donor with a good-faith estimate of the value of the goods or services that the donor received.

The charity must furnish the statement in connection with either the solicitation or the receipt of the quid pro quo contribution. If the disclosure statement is furnished in connection with a particular solicitation, it is not necessary for the organization to provide another statement when the associated contribution is actually received.

The disclosure must be in writing and must be made in a manner that is reasonably likely to come to the attention of the donor. For example, a disclosure in small print within a larger document might not meet this requirement.

In the following three circumstances, the disclosure statement is not required.

- (1) Where the only goods or services given to a donor meet the standards for "insubstantial value" set out in section 3.01, paragraph 2 of Rev. Proc. 90-12, 1990-1 C.B. 471, as amplified by section 2.01 of Rev. Proc. 92-49, 1992-1 C.B. 987 (or any updates or revisions thereof);
- (2) Where there is no donative element involved in a particular transaction with a charity, such as in a typical museum gift shop sale.
- (3) Where there is only an intangible religious benefit provided to the donor. The intangible religious benefit must be provided to

the donor by an organization organized exclusively for religious purposes, and must be of a type that generally is not sold in a commercial transaction outside the donative context. An example of an intangible religious benefit would be admission to a religious ceremony. The exception also generally applies to de minimis tangible benefits, such as wine, provided in connection with a religious ceremony. The intangible religious benefit exception, however, does not apply to such items as payments for tuition for education leading to a recognized degree, or for travel services, or consumer goods.

A penalty is imposed on charities that do not meet the disclosure requirements. For failure to make the required disclosure in connection with a quid pro quo contribution of more than \$75, there is a penalty of \$10 per contribution, not to exceed \$5,000 per fundraising event or mailing. The charity may avoid the penalty if it can show that the failure was due to reasonable cause.

Please note that the prevailing basic rule allowing donor deductions only to the extent that the payment exceeds the fair market value of the goods or services received in return still applies generally to all quid pro quo contributions. The \$75 threshold pertains only to the obligation to disclose and the imposition of the \$10 per contribution penalty, not the rule on deductibility of the payment.



Department of the Treasury
Internal Revenue Service
Publication 1771 (11-93)
Catalog Number 20054Q

Internal Revenue Service
1111 Constitution Avenue, NW
Washington, D.C. 20224

Bulk Rate
Postage and Fees Paid
IRS
Permit No. G-48

COMMONWEALTH OF PENNSYLVANIA

CHARTER

to operate a public school

known as

WEST OAK LANE CHARTER SCHOOL

Pursuant to the authority vested in the Board of Education of the School District of Philadelphia under the Public School Code of 1949, as amended, and Act 22 of 1997, the Board of Trustees of the West Oak Lane Charter School

is hereby granted a Charter to operate a public school located at 7151-59 Stenton Avenue, Philadelphia, PA

for the period commencing on September 1, 1998

and ending on August 31, 2002.

The grant of this charter was approved by vote of the Board of Education at a public meeting held on February 9, 1998.

It is specifically understood and agreed between the signatories hereto that:

1) the Board of Trustees shall operate the charter school in accordance with the provisions of Act 22 of 1997, any amendments thereto enacted during the term of this charter and any regulations or standards applicable to charter schools;

2) the granting of this charter is specifically contingent upon operation of the charter school in strict adherence to the terms of the application and Statement of Assurances submitted by the Board of Trustees and approved by the Board of Education. Said application and Statement are attached hereto as Appendix A and are incorporated herein by reference as if fully set forth;

3) this Charter and the Appendix hereto constitute a legally binding agreement for the term set forth above and the terms of said agreement cannot be changed absent a written amendment to this charter;

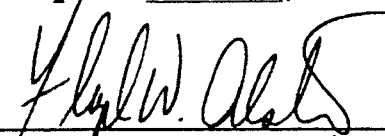
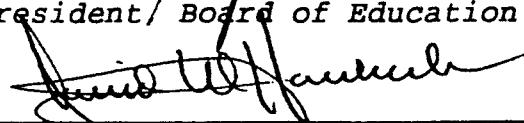
4) this charter may be renewed for an additional period up to five (5) years duration and upon any such renewal, a new charter shall be executed by the parties; and

5) this charter may only be terminated in accordance with the provisions of applicable law.

CHARTER SCHOOL:

In Testimony Whereof We Hereby
Set Our Hands and Seals this
24th day of Sept., 1998


President, Board of Trustees


President, Board of Education

Secretary, Board of Education

The School District of Philadelphia

Statement of Assurances for
1998-99 Charter Schools

By duly authorized signature below, West Oak Lane Charter School (insert name of charter school) hereby agrees that the following terms and conditions will prevail for the duration of the charter, and understands that any material deviation from any of these terms and conditions is cause for revocation or nonrenewal of any charter that may be granted by the Philadelphia Board of Education at any time during the term of such charter.

1. The charter school will comply with all applicable federal and state laws and regulations, and the authorizing legislation for charter schools.
2. The charter school will be nonsectarian in all operations.
3. The charter school will provide a minimum of one-hundred eighty (180) days of instruction and nine hundred (900) hours per year of instruction at the elementary level, or nine hundred ninety (990)) hours per year of instruction at the secondary level.
4. Prior to employing any individual who shall have direct contact with students, the charter school shall ensure that criminal history and child abuse/injury records are obtained in compliance with §1-111 of the Public School Code and 23 Pa. C.S.A. subchapter C2, regarding background checks.
5. The charter school will provide the Philadelphia Board of Education with access to all of its records and facilities to ensure that the charter school is in compliance with its written charter.
6. The charter school will administer the School District's citywide academic assessments and set forth as a minimum performance standard the performance targets associated with the academic components of the District's professional responsibility system.
7. The charter school will not establish student admissions criteria that would discriminate on the basis of race, socio-economic status, English language proficiency, special education disability or academic achievement level.
8. The following legal documentation is submitted to the Philadelphia Board of Education no later than August 3, 1998:
 - evidence that the *charter school* itself has been organized as a public nonprofit corporation in accordance with Section 1714-A of Act 22 of 1997;
 - valid occupancy certificates for each facility serving the charter school's students;
 - a signed lease or deed for each facility serving the charter school's students.
 - sufficient staff with complete and appropriate criminal and child abuse records checks have been hired to serve the actual enrollment of the charter school; and
 - the charter school has obtained appropriate insurance coverage for errors and omissions (also known as professional liability insurance), property and general liability, automobile, and workers' compensation.
9. The charter school will comply with applicable special education guidelines as they may be amended from time to time.

Sharmain Matlock-Turner
Duly Authorized Signatory

7/28/98
Date

Sharmain Matlock-Turner, President, Board of Trustees
Typed Name and Title of Signatory

7013 770

FEB 27 1998

Microfilm Number _____

Filed with the Department of State on _____

Entity Number 2802622

 Secretary of the Commonwealth
 

ARTICLES OF INCORPORATION-DOMESTIC NONPROFIT CORPORATION

DSCB:15-5306 (Rev 90)

In compliance with the requirements of 15 Pa.C.S. § 5306 (relating to articles of incorporation), the undersigned, desiring to incorporate a nonprofit corporation, hereby state(s) that:

1. The name of the corporation is: West Oak Lane Charter School

2. The (a) address of this corporation's initial registered office in this Commonwealth or (b) name of its commercial registered office provider and the county of venue is:

(a) <u>7178 Ogontz Avenue</u>	<u>Philadelphia</u>	<u>PA</u>	<u>19138</u>	<u>Philadelphia</u>
Number and Street	City	State	Zip	County

(b) c/o: _____
 Name of Commercial Registered Office Provider County

For a corporation represented by a commercial registered office provider, the county in (b) shall be deemed the county in which the corporation is located for venue and official publication purposes.

3. The corporation is incorporated under the Nonprofit Corporation Law of 1988 for the following purpose or purposes:

To provide public education through operation of a charter school. Also see attached.

4. The corporation does not contemplate pecuniary gain or profit, incidental or otherwise. _

5. The corporation is organized upon a nonstock basis.

6. (Strike out if inapplicable): The corporation shall have no members.

7. (Strike out if inapplicable): The incorporators constitute a majority of the members of the committee authorized to

incorporate: _____
 by the requisite vote required by the organic law of the association for the amendment of such organic law.

8. The name and address, including street and number, if any, of each incorporator is:

Name	Address
<u>Sharmain Matlock-Turner</u>	<u>720 E. Vernon Rd. Philadelphia, PA 19150</u>
<u>Marlene Owens</u>	<u>6470 Anderson St. Philadelphia, PA 19119</u>
<u>Vall Adams</u>	<u>7502 Limekiln Pike Philadelphia, PA 19150</u>
<u>See Attached</u>	

9. The specified effective date, if any, is: upon filing
 month day year hour, if any

10. Additional provisions of the articles, if any, attach an 8 1/2 x 11 sheet.

PA DEPT. OF STATE

FEB 27 1998

Attachment to Articles of Incorporation for West Oak Lane Charter School**8. Incorporators (continued)**

Name	Address
Horace Smith	1314 North Redfield Street, Philadelphia, PA 19151
Ronald Drayton	7220 Limekiln Pike, Philadelphia, PA 19138

Articles of Incorporation of the West Oak Lane Charter School**Purpose:**

To facilitate the organization's educational and charitable purposes, the corporation may do all things and acts and exercise all powers, rights and privileges which a nonprofit corporation may now or hereafter be authorized to do or to exercise under the Nonprofit Corporation Law of the Commonwealth of Pennsylvania.

The Corporation is organized exclusively for charitable and educational purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

The Corporation does not contemplate pecuniary gain or profit. No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article Third hereof. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these articles, the Corporation shall not, except to an insubstantial degree, engage in any powers that are not in furtherance of the purposes of this corporation.

Upon the dissolution of the Corporation, the Board of Trustees shall, after paying or making provision for the payment of all the liabilities of the Corporation, distribute all the assets for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a court of competent jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine, which are organized and operated exclusively for such purposes.

9852- 955

Filed in the Department of
State on JUL 13 1998

2802622
Department of Treasury - Internal Revenue Service
AMENDMENT AGREEMENT

Secretary of the Commonwealth

CORPORATION:

WE AGREE TO AMEND OUR ORGANIZING DOCUMENT AS FOLLOWS:

1. Amend the third paragraph of the Purpose article to delete the following:
"Notwithstanding any other provision of these articles, the Corporation shall not, except to an insubstantial degree, engage in any powers that are not in furtherance of the purposes of this corporation".
2. Amend the third paragraph of the Purpose article to add the following:
"Notwithstanding any other provision of these articles, this corporation shall not carry on any activities not permitted to be carried on a) by a corporation exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code of 1986 or the corresponding provision of any future United States Internal Revenue law or b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code (or corresponding section of any future Federal tax code)."

=====

WEST OAK LANE CHARTER SCHOOL agrees to make the amendments noted above and will provide a conformed state certified copy of the Articles of Amendment to the Service, upon approval by the state.

We recognize that failure to comply with this agreement could adversely affect the exempt status of the organization.

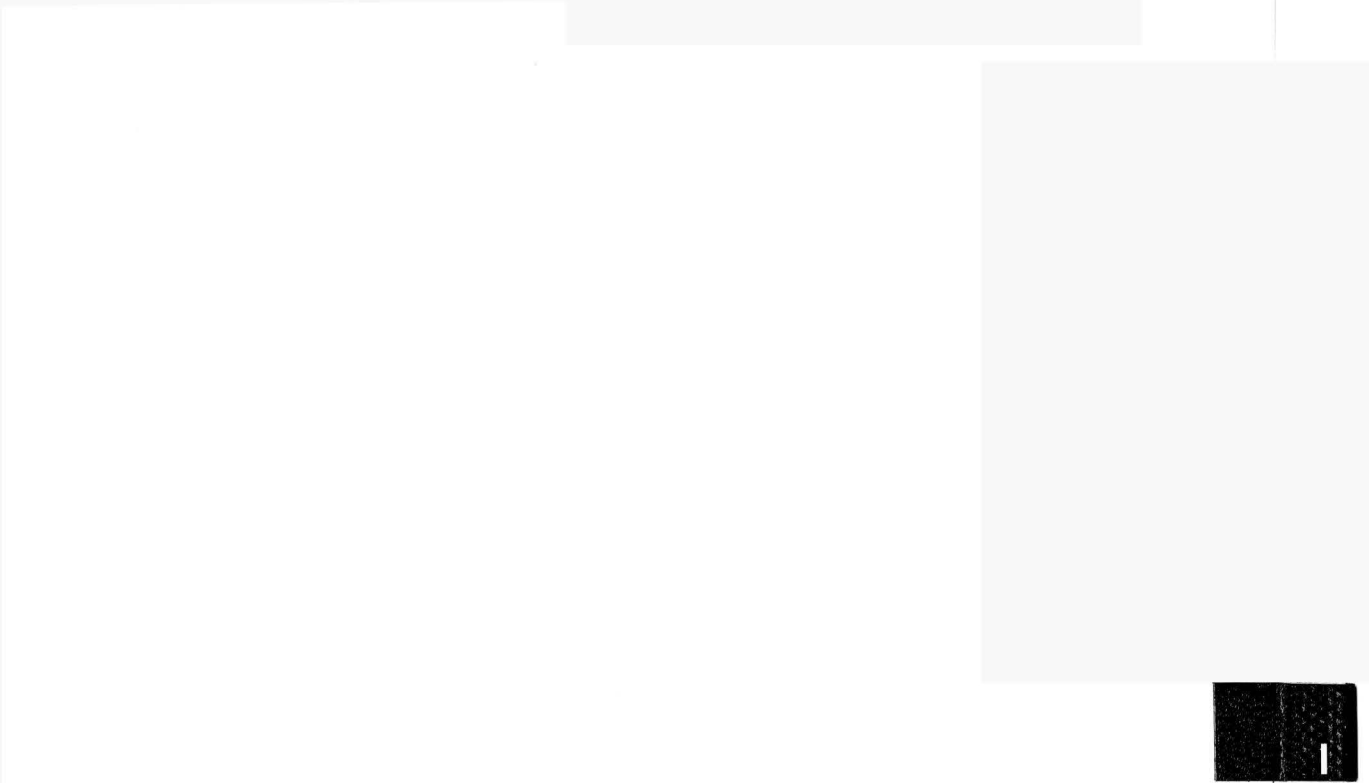
P. W. Mattach-Lurker
Signature

President
Title

7/8/98
Date

JUL 13 98

PA Dept. of State



SUBLEASE AGREEMENT

I. Dates and Parties

This Sublease, made on ~~August~~ *September* 15, 1998, is between **OGONTZ AVENUE REVITALIZATION CORPORATION** (the "Sublessor") and **WEST OAK LANE CHARTER SCHOOL** (the "Sublessee"). The Sublessor's mailing address is 7178 Ogontz Avenue Philadelphia, Pennsylvania 19138.

II. Rented Property

a. Sublessor has entered into a Lease dated June 6, 1998, ("Lease") with Braham Management Corporation as agent for the Estate of Leon Freeman ("Landlord") to rent 40,440 square feet of the premises known as Unit Numbers 14 and 16, located at 7157-59 Stenton Avenue and 7109 Stenton Avenue, Philadelphia, PA 19138 (collectively referred to as the "Premises") are more fully decried in Exhibit A to the Lease which is hereby incorporated herein by reference.

b. The use of the Premises as stated in the Lease is for the sole purpose of conducting the business of a charter school and administrative offices. The Sublessor hereby Sublets the premises to Sublessee for the purposes described in the Sublease

c. All the terms used in this Sublease have their meanings as defined in the Lease.

III. Term

The term of this Sublease shall begin on September 15, 1998 and end on June 30, 2003.

IV. Rent

Sublessee promises to pay Sublessor \$6.53 per square foot as annual base rent plus the cost of the leasehold improvements made by Sublessor. Such payments shall be prorated and made on a monthly basis.

Sublessee will also pay an annual surcharge equal to a percentage of the then current base rent under the Lease which is equal to the annual percentage increase in the student allotment to Sublessee in any year over the amount allotted in the year in which this Sublease commences.

V. Remedies

In the event of any default by Sublessee under the Lease or this Sublease and following any applicable grace period as provided in the Lease, Sublessor, at its option and without notice may revoke this Sublease, take possession of and operate the Premises and do any act which Sublessor may deem proper to protect it from liability under the Lease. For these purposes, Sublessee hereby constitutes and appoints Sublessor, or any

e:9065/84/9/14/98

officer of Sublessor, its true and lawful attorney-in-fact, with full power of substitution in the premises, to perform all acts as aforesaid in the name of Sublessee. Sublessor's rights pursuant to this Sublease are subject and subordinate to any rights and remedies granted by Sublessor or Sublessee to Equi-Mor Holdings, Inc., a Nevada corporation ("Lender"), regarding the Premises and are subject to the Landlord's rights under the Lease.

VI. Indemnification

Sublessee shall be obligated to perform or discharge any and all obligations of Sublessor under the Lease and Sublessee hereby agrees to indemnify Sublessor against and hold it harmless from and against any and all liability, loss or damage which may be incurred under or by reason of this Sublease and from any and all claims and demands whatsoever which may be asserted against it by reason of any alleged obligation or undertaking on the part of it to perform or discharge any of the terms of the Lease. Should Sublessor incur any such liability, loss or damage under the Lease or by reason of this Sublease, or in defense against any such claims or demands, the amount thereof, including costs, expenses and reasonable attorneys' fees, shall be secured hereby and Sublessee shall reimburse Sublessee therefor immediately upon demand.

VII. Quiet Enjoyment

Sublessor warrants that it has not executed any prior Sublease of any of its rights under the Lease and that it has not done anything which might prevent Sublessee from or limit Sublessee in operating under any of the provisions hereof and that it has the right to execute and deliver this Sublease subject to the approval of Landlord which has been granted pursuant to Section 14.01(a) of the Lease. Sublessor also hereby covenants and agrees not to do any act which would destroy or impair the benefit to Sublessee of this Sublease provided Sublessee is not in default under the Lease.

VIII. Not A Partner

Nothing in this Sublease shall be construed to make Sublessor a partner or joint venturer of Sublessee. Sublessee hereby releases, holds harmless and indemnifies Sublessor from any and all liability to Sublessor or third parties (including without limitation students and their parents or guardians) for matters arising out of the academic activities of Sublessee.

IX. Subleasing

Sublessee may not sublet the Premises except to Lender or Lender's nominee as approved by Landlord.

X. Insurance

e:9065/R4/9/14/98

The Sublessor shall not be responsible for loss or damage to any of the Property other than that caused maliciously or willfully by the Sublessor. Sublessee is required to adequately insure its interest in the Property.

XI. Assignment

The provisions of this Sublease shall be binding upon, and shall inure to the benefit of, the respective heirs, executors, administrators, successors and assigns of the parties; provided, however, that the Sublessor shall not assign this Sublease without the prior written consent of the Sublessor and Landlord.

XI. Entire Agreement

This Sublease represents the final and complete agreement between the Sublessor and the Sublessee. Any oral or written promise made by either party prior to the signing of this Sublease and not included in this Sublease is not enforceable.

WEST OAK LANE CHARTER SCHOOL

By:

Harold F. Smith
Vice President

**OGONTZ AVENUE REVITALIZATION
CORPORATION**

By:

P.W. Matlack-Suerner
President

West Oak Lane Charter School Board Resolution

The West Oak Lane Charter School, a Pennsylvania nonprofit corporation, hereby consent in writing to the following resolutions:

Whereas the following are members of the Board of Trustees: Sharmain Matlock-Turner, President; Horace Smith, Vice-President; Vall Adams, Secretary; Marlene Owens, Treasurer; and Ron Drayton, Member;

Be it resolved that the West Oak Lane Charter School hereby enters into a sublease agreement with the Ogontz Avenue Revitalization Corporation and will pay for the leasehold improvements invested into the site on a monthly basis;

Be it also resolved that no later than December 31, 1998, the board would review whether any adjustments to the leasehold improvement payment should be made and will take such actions accordingly.

These resolutions were adopted at a duly held meeting of the West Oak Lane Charter School Board of Trustees on Monday, September 14, 1998.

9/8/98
Date

S. W. Matlock-Turner
Sharmain Matlock-Turner, President

9/8/98
Date

Vall Adams
Vall Adams, Secretary

BRAHIN MANAGEMENT CORPORATION

Suite 200
1535 Chestnut Street
Philadelphia, PA 19102
215-563-7222
FAX: 215-563-2449

February 19, 1999

SENT VIA FAX: (215) 927-1856

Mr. Jack Kitchen
Ogontz Avenue Revitalization Company
7178 Ogontz Avenue
Philadelphia, PA 19138

**RE: UNIT #17 OPTION TERMS
MT. AIRY SHOPPING CENTER**

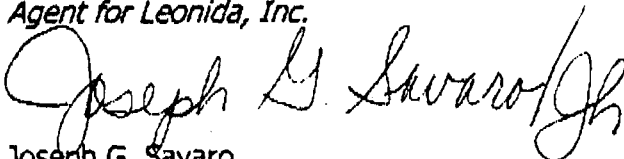
Dear Jack:

To clarify my January 13, 1999 correspondence, Ogontz Avenue Revitalization Company shall have three (3) additional five (5) year option terms for their occupancy of Unit 17 at the Mt. Airy Shopping Center.

The acceptance of each term shall be exercised in accordance with the terms of the Lease Agreement dated June 6, 1998.

If you have any questions or concerns regarding your occupancy, please do not hesitate to contact me.

Sincerely,
Brahin Management Corporation
Agent for Leonida, Inc.



Joseph G. Savaro
Director of Asset Management

JGS:jl

Post-It® Fax Note 7671		Date	# of pages
To	Jack Kitchen	2/19/99	1
Co./Dept.		From	Joe Savaro
Phone #		Co.	
Fax #	215-1856	Phone #	563-7222
		Fax #	563-2449

RAHIN MANAGEMENT CORPORATION

Suite 200
1535 Chestnut Street
Philadelphia, PA 19102
215-563-7222
FAX: 215-563-2449

OK Sch

May 11, 1998

Mr. Jack Kitchen
Ogontz Avenue Revitalization Company
7178 Ogontz Avenue
Philadelphia, PA 19138

SENT VIA MAIL & FAX #: (215) 927-1856

RE: PROPOSED WEST OAK LANE CHARTER SCHOOL
MT. AIRY SHOPPING CENTER
STENTON AVENUE @ WASHINGTON LANE
PHILADELPHIA, PENNSYLVANIA

Dear Jack:

I am pleased to learn of your continued interest in locating a Charter School within our above-referenced property. Pursuant to our meeting at the premises this morning, I have outlined below the general business terms and conditions which would be acceptable to the Landlord for a Lease at this location:

Landlord:	The Estate of Leon Freeman	
Tenant:	Ogontz Avenue Revitalization Company	
Location:	7157-59 Stenton Avenue (Store #14) 7109 Stenton Avenue (Store # 16) Philadelphia, PA	
Size:	Store #14 @ 8,700 sq. ft. (Former Rite Aid) Store #16 @ 31,740 sq. ft. (Former Supermarket)	
Use:	Charter School, K-Fourth Grade	
Term:	Five (5) years	
Options:	Three (3) options @ five (5) years each	
Base Rent:	Year 1-5:	\$5.00 p.s.f.
	First Option:	\$5.75 p.s.f.
	Second Option:	\$6.62 p.s.f.
	Third Option:	\$7.60 p.s.f.
C.A.M.:	Pro-rata share estimated @ \$.58 p.s.f.	
Insurance:	Pro-rata share estimated @ \$.04 p.s.f.	

40,440 sq ft

20 yrs

\$2million

Mr. Jack Kitchen
Page - 2 -
May 11, 1998

R.E.T.: Pro-rata share estimated @ \$.58 p.s.f.

U & O Taxes: Tenant's responsibility, if applicable.

Landlord's Work: Space to be delivered "as-is" with all supermarket fixtures removed in broom swept condition. Landlord will have a continuing maintenance responsibility for the building's roof and structural integrity. The HVAC system will be warranted for one (1) year by Landlord.

Rent Commencement: September 1, 1998

Adjacent Space: Should the space known as 7115 Stenton Avenue (Store #17 - currently occupied by a Dollar Store having 5,178 sq. ft.) become available during the term or any renewal options of said Lease, Tenant shall have the obligation to enter into a Lease with Landlord for this space. The Lease will contain the same general terms and conditions as the Tenant's Leases for 7157-59 Stenton Avenue (Store #14) and 7109 Stenton Avenue (Store #16), except that Tenant's rental and Lease term shall commence thirty (30) days after Landlord's delivery of such space to Tenant.

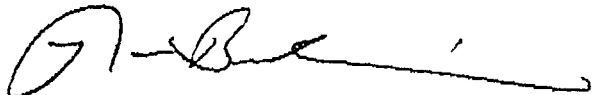
The above Lease proposal is non-binding and contingent upon a mutually executed Lease Agreement.

As you are aware, the property is a zoned Area Shopping Center. Please let me know what your feelings are with respect to a need for a zoning variance for your intended use.

Also, please advise on the structure of the State funding for the Charter School. Will it be possible to obtain a guarantee of the Lease from the State of Pennsylvania?

Please contact me upon your review of our above proposal with your questions and comments. I look forward to working with you on this transaction.

Sincerely,



Lee F. Brahlin

LFB:jl





Delaware Valley Community Reinvestment Fund
Collaborative Lending Initiative • DVCRF Ventures

June 15, 1998

Andrea Thomas Reynolds
Executive Director
Ogontz Avenue Revitalization Corporation
7178 Ogontz Avenue
Philadelphia, PA 19138

Dear Andrea:

I am pleased to inform you that the Delaware Valley Community Reinvestment Fund has approved a bridge loan of \$225,000 to the West Oak Lane Charter School ("Borrower") and the Ogontz Avenue Revitalization Corporation ("Co-Borrower"). The Delaware Valley Community Reinvestment Fund ("DVCRF") would thus like to extend to you the following Commitment Letter:

Loan Amount:	\$225,000 (the "Loan")
Term:	6 months
Interest Rate:	8%
Fees:	1% of loan amount (\$2,250), payable at closing.
Repayment:	Payments of interest shall be due and payable on the 1st day of each month throughout the term of the Loan. The principal shall be due and payable upon receipt by the Borrower of proceeds of a Start-Up Grant from the School District of Philadelphia and Commonwealth of Pennsylvania, Department of Education, Charter School Office, or other grant sources if they become available (the "Grants").
Term of Commitment:	Unless accepted in writing within 15 days of the date of this Commitment Letter, DVCRF's offer to make the Loan shall terminate. Upon receipt of the Borrower's signed acceptance of this Commitment Letter, DVCRF's commitment to make the Loan will remain open for 60 days after which time DVCRF shall not be obligated to close the Loan.

June 15, 1998

Page 2

The Loan is subject to the following terms and conditions:

1. The principal and any outstanding interest is payable on demand, but if no demand is made then on the maturity date.
2. The proceeds of the Loan shall be used solely for the start-up costs associated with the West Oak Lane Charter School at Stenton Avenue and Washington Lane.
3. DVCRF shall have a security interest in the proceeds of a \$438,400 start-up grant from the School District of Philadelphia/Commonwealth of Pennsylvania. The security interest shall be evidenced by UCC-1s filed by DVCRF and a security agreement from the Borrower and Co-Borrower.

Prior to Settlement:

4. Borrower and Co-Borrower shall provide evidence satisfactory to DVCRF authorizing the borrowing of funds under the terms and conditions set forth herein and designating authorized signers to complete the loan transaction. Loan documents will be signed by authorized representatives from both the Borrower and Co-Borrower. Such evidence shall also reflect the intention of Borrower to repay the Loan from the proceeds of the Grants.
5. DVCRF shall require evidence that the Borrower is current with respect to all its tax obligations including but not limited to payroll tax liabilities, federal and state taxes and City taxes. Additionally, Borrower shall provide DVCRF with evidence of insurance (liability and worker's compensation)
6. DVCRF shall have received copies of all executed and filed organizational documents applicable to the Borrower.
7. The Borrower shall pay all loan processing costs incurred by DVCRF including but not limited to searches and filing costs.
8. The Borrower shall pay all loan settlement costs including but not limited to recording fees, insurance, legal fees and notary costs.
9. The Borrower shall provide written confirmation of the eligible amount of the start-up grant (\$438,400).
10. The Borrower shall provide a written acknowledgement of DVCRF's loan and collateral by Equi-Mor Holdings, Inc. Any agreements with Equi-Mor Holdings shall acknowledge DVCRF's loan and lien on the proceeds of the start-up grant.

June 15, 1998

Page 3

11. The Borrower shall provide copies of all financing agreements with Equi-Mor Holdings or any other source of financing for the Charter School project.

12. The Borrower shall provide a copy of the executed agreement with Foundations, Inc. to provide technical assistance to the Charter School.

13. The Borrower shall provide a construction and operating budget for the Charter School.

14. The Borrower shall provide a copy of the School District of Philadelphia's approval of the West Oak Lane Charter School, noting the replacement of the Edison Group with Foundations, Inc and the change in the expected enrollment.

15. The Borrower shall provide a written contingency plan for relocating classes in the event the Charter School renovation is not complete by the date school opens. This summary will include an explanation of how and where classes will be held, for how long and what additional costs will be incurred.

16. The Borrower shall provide a copy of the lease and staff list.

Post Settlement:

17. DVCRF will advance funds only for expenses which are eligible for funding under the Charter School start-up grant.

18. DVCRF will advance funds for staff expenses eligible for start-up funding, which were incurred after the granting of the Charter.

19. The Borrower shall submit weekly updates on enrollment from September 1, 1998 until November 1, 1998.

20. Throughout the term of the Loan, Borrower and Co-Borrower shall provide DVCRF with quarterly internal financial statements within 30 days of the end of each quarter and an annual audited financial statement within 120 days of the end of its fiscal year.

21. The Loan may be prepaid in whole or in part at any time without premium or penalty.



June 15, 1998

Page 4

As with all DVCRF loans, the Loan is subject to the ongoing condition that the continuing financial condition of Borrower is acceptable to DVCRF and may be withdrawn at any time.

Sincerely,

Lara Jakubowski
Loan Officer

Accepted and agreed to the 23 day of June, 1998.

WEST OAK LANE CHARTER SCHOOL

By:

Title: President

Accepted and agreed to the 23rd day of June, 1998.

OGONTZ AVENUE REVITALIZATION CORPORATION

By:

Title: SECRETARY

DVCRF-Loan-Com.For

WEST OAK LANE CHARTER SCHOOL

Sponsored by the

OGONTZ AVENUE REVITALIZATION CORPORATION

SOURCES OF REVENUE

DVCRF	225,000.00
-------	------------

TOTAL REVENUE	225,000.00
----------------------	-------------------

COSTS:

Site Demo	42,000.00
Phase I - Environmental	2,000.00
Soil Study	2,000.00
Loan Fees - Origination/Reserve	60,000.00
Permits	5,000.00
Appraisals	9,000.00
Consulting Fees	40,000.00
Legal Fees	15,000.00

OARC Related Expenses	50,000.00
-----------------------	-----------

TOTAL PROJECT COSTS	225,000.00
----------------------------	-------------------

REVENUE LESS EXPENSES	-
------------------------------	---

Notes:

1. Site Demo - work performed by Agoos/Louvera Architects
2. Loan Fees - West Oak Lane Charter School will receive \$2,000,000 in permanent financing from Equi-Mor Holdings, Inc. Equi-Mor closing is tentatively set for June 15, 1998. Equi-Mor is charging 1.5% origination fee and a 1.5% reserve fee.
3. Appraisals - to be performed by Cushman & Wakefield (on the Equi-Mor approved list). The company will perform 2 appraisals: a) Site of school w/ leasehold improvements (site plan) and b) Southeastern PA Regional Employment & Training Center
4. Consulting Fees w/ Foundation Technical Assistance Center. Total fees projected prior to opening the school is \$83,700. These proceeds will be used to cover initial costs from Foundations.
5. Legal Fees - through July 30, 1998, expected to expend \$15,000 in legal fees.
6. OARC Related expenses will cover 60% of staff time devoted on this project from November 1997 - June 30, 1998.



Drexel University/FOUNDATIONS Inc.
Technical Assistance Center for Public Charter Schools

RECEIVED

October 14, 1998

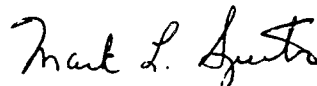
Ms. Faye Wilson, Administrator
Office of Charter Schools
School District of Philadelphia
Administration Building
21st St. S. of the Parkway – Room 226
Philadelphia, PA 19103

Dear Faye,

Attached is a revised operating budget for the West Oak Lane Charter School (WOLCS) for 1998/99. It was adopted by the WOLCS Board in a format familiar to the School District on September 28, 1998. It was then translated into State Account Code Format for the PDE 2028 which has been submitted to the Department of Education. This is a process similar to that used by the School District of Philadelphia.

If there are any questions, you can contact me at 1-888-693-6675.

Sincerely,



Mark Spector
Director of Finance

Att.

Cc: ✓ Andrea Reynolds-Thomas, Executive Director, OARC
Donald Green, Finance Director, OARC
Philip Esbrandt, Executive Director, TAC

**BUDGET FORM FOR CHARTER SCHOOL APPLICATIONS
TO THE SCHOOL DISTRICT OF PHILADELPHIA**

NAME OF SCHOOL West Oak Lane Charter SchoolFISCAL YEAR 1998/99Enrollment 548 Org. K-4

Position Title	Average Salary	Number of Positions	Total Salary	Cost of Medical Insurance*	PSERS or other retirement plan*	FICA and all other benefits*	TOTAL COST OF POSITION OR CATEGORY
1. Teacher	33,154	26	862,004	130,000	52,065	65,943	1,110,012
2. Success for all Coordinator	52,000	1	52,000	-	3,141	3,978	59,119
3. Principal (12 months)	65,000	1	65,000	5,000	3,926	5,003	78,929
4. Assistant Principal (12 months)	53,000	1	53,000	5,000	3,201	4,055	65,256
5. Lead Secretary (12 months)	27,000	1	27,000	5,000	1,631	2,066	35,696
6. Noon Time Aides	2,400	5	12,000	-	-	918	12,918
7. Secretary (12)	23,000	1	23,000	5,000	1,389	1,760	31,149
8. Safety Officer	21,000	1	21,000	5,000	1,268	1,607	28,875
9. Technology Director	50,000	1	50,000	5,000	3,020	3,825	61,845
10. Information Ctr. Mgr (LIMA)	30,000	1	30,000	5,000	1,812	2,295	39,107
11. Non-Instructional Aide	27,000	1	27,000	5,000	1,631	2,066	35,696
12. Crossing Guard (P/T)	-	0	-	-	-	-	-
13. Tutors	12,000	7	84,000	-	-	6,426	90,426
14. Food Service	4,324	4	17,296	-	-	1,323	18,619
SUBTOTAL		51	1,323,300	170,000	73,084	101,263	1,667,647
Substitute Service			19,500		-	1,492	20,992
Extracurricular/Overtime Pay					-	-	-
Professional Development/Training			25,000		-	-	25,000
Contracted Services							
Professional Services							332,029
Cleaning Services							30,630
Nurse Services							32,000
General Accounting							48,034
Insurance (liability, fire, Etc)							53,754
Social Work							20,000
Legal Services							25,000
Business Services (Auditing)							12,000
Payroll ADP							3,000
Consumable Supplies							117,820
Travel/Transportation							5,000
Books/Instructional Materials							170,016
Equipment Purchases							153,000
Computers - Leased							69,960
Computers Wiring, etc.							115,675
Site Costs:							
Lease							598,696
Utilities (if separate)							77,028
Cleaning (if separate)							28,581
Site Cleanup							2,000
Plumbing							5,000
Landscaping							6,000
Smoke Detectors							2,632
Playground Area							16,000
Adjacent Play Area							10,000
Ground Maintenance							7,000
Interest Expense							7,000
Other Personal Services							47,000
Advertising/Marketing							7,500
Accounting Software							2,500
Board Meetings							1,000
TOTAL							3,719,494

BUDGET FORM FOR CHARTER SCHOOL APPLICATIONS				
NAME OF SCHOOL West Oak Lane Charter School			FISCAL YEAR 1998/99	
FINANCING:	or Other	No. of Children		Total Allot.
Local -				
Per Pupil Allocation	5,246	521		2,733,166
Special Education	9,731	27		262,737
State -				
Start-up Grant	800	548		438,400
FICA	0.0381		1,342,800	51,161
PSERS	0.0304		1,294,004	39,338
Note FICA & PSERS reimbursed by State				
Supplemental Pay	69	548		37,812
Title I	548 x .284622 = (156) x \$1005.61			156,881
Fund Raising				
	Total Revenue			3,719,494
	Total Expenditures			3,719,494
	Surplus/(Deficit)			-
Contracted Services:				
Professional Services -				
Business Services (Auditing & Accounting Services)				12,000
Legal Services				25,000
Cleaning Services (\$3063 @ 10mo.)				30,630
Consulting				
Foundations (pre-opening)				84,730
Foundations (during school year)				45,270
OARC (pre-development costs (2/98 - 9/98)				80,000
OARC (facilities mgr/5th grade - during school yr)				50,000
Success for all Training				30,000
Food Services/Vending				17,000
Auxiliary/Psychological Services				25,029
	Total			332,029
Misc.				
Advertising/Marketing				7,500
Accounting Software				2,500
Board Meetings	Revised Budget 9-8-98 Support FY99			1,000
Payroll - ADP				3,000
				14,000
Other Personal Services -				
Security Services				32,500
Trash Removal				12,000
Pest Control Services				2,500
	Total			47,000
Insurance				53,754
Nurse Services				32,000
General Accounting (OARC)				48,034
Social Work (WAWA)				20,000
Consumable Supplies	215	548		117,820
Travel				5,000
Books/Instructional Aids	292	548		160,016
Library Books and Shelving				10,000
				292,836
Equipment				
Furniture				110,000

Cubicles	24,000
Copier	14,000
Fax/Office Equipment	5,000
Computers (Leased)	69,960
	<hr/> 222,960
Site Costs	
Lease	444,696
Leasehold improvements - OARC	154,000
Site Cleanup	2,000
Plumbing	5,000
Smoke Detectors	2,632
Utilities (Telep., Voice Mail, Elec. Gas, Water)	77,028
Cleaning and Maintenance (Supplies)	28,581
Landscaping	6,000
Playground Area	16,000
Adjacent Play Area	10,000
Ground Maintenance	7,000
	<hr/> 752,937
Computer Wiring	
Computer Wiring (200 drops)	50,700
Network Hardware	20,883
Software	30,000
Internet	14,092
	<hr/> 115,675
Interest Expense	7,000
Total Expenditures	<hr/> 3,719,494

**Labor, Education and Community Services
Comptroller's Office**

General Fund Budget
School Districts, Area Vocational Technical Schools,
Charter Schools, and Special Program Jointures

PDE-2028
For Fiscal Year
Ended 06/30/99

General Fund Budget Approval

Date of Adoption of the General Fund Bud: 9/28/98

P. W. Matlack-Sumner
President of the Board

10/13/98
Date

Vall P. Adams
Secretary of the Board

10/13/98
Date

J. Kent Horton
Superintendent

10/13/98
Date

Mark Spector
Contact Person

215 925 6088
Phone

CODE	LINE	ITEM	AMOUNT	TOTAL
		<u>ESTIMATED BEGINNING UNRESERVED FUND BALANCE AVAILABLE FOR APPROPRIATION AND RESERVES SCHEDULED FOR LIQUIDATION DURING THE FISCAL YEAR</u>		
	1	Estimated Reserve for Encumbrances		
	2	Estimated Unreserved Fund Balance (Deficit)		
	3			
	4			
	5			
	6			
	7	<u>TOTAL ESTIMATED BEGINNING UNRESERVED FUND BALANCE AVAILABLE FOR APPROPRIATION AND RESERVES SCHEDULED FOR LIQUIDATION DURING THE FISCAL YEAR</u>		0
		<u>SUMMARY OF ESTIMATED GENERAL FUND REVENUES AND OTHER FINANCING SOURCES</u>		
6000	8	Revenue from Local Sources	0	
7000	9	Revenue from State Sources	90,499	
8000	10	Revenue from Federal Sources	595,281	
9000	11	Other Financing Sources	3,033,715	
	12	<u>TOTAL ESTIMATED REVENUES AND OTHER FINANCING SOURCES</u>		3,719,495
	13	<u>TOTAL ESTIMATED FUND BALANCE, REVENUES, AND OTHER FINANCING SOURCES AVAILABLE FOR APPROPRIATION</u>		<u>3,719,495</u>

CODE	LINE	ITEM	AMOUNT	TOTAL
1000		<u>INSTRUCTION</u>		
1100	14	Regular	1,681,654	
1200	15	Special	0	
1300	16	Vocational Education	0	
1400	17	Other Instructional	0	
1600	18	Adult Education	0	
1700	19	Community / Junior College	0	
		TOTAL INSTRUCTION		1,681,654
2000		<u>SUPPORT SERVICES</u>		
2100	20	Support Services - Pupil Personnel	25,029	
2200	21	Support Services - Instructional Staff	204,545	
2300	22	Support Services - Administration	300,031	
2400	23	Support Services - Pupil Health	52,000	
2500	24	Support Services - Business	90,854	
2600	25	Operation and Maintenance of Plant Services	948,893	
2700	26	Student Transportation Services	0	
2800	27	Support Services - Central	360,952	
2900	28	Support Services - Other Support Services	0	
		TOTAL SUPPORT SERVICES		1,982,304
3000		<u>OPERATION OF NONINSTRUCTIONAL SERVICES</u>		
3200	29	Student Activities	0	
3300	30	Community Services	0	
		TOTAL OPERATION OF NONINSTRUCTIONAL SERVICES		0
4000	31	<u>FACILITIES ACQUISITION, CONSTRUCTION, & IMPROVEMENT SERVICES</u>	0	
		TOTAL FACILITIES ACQUISITION, CONSTRUCTION, & IMPROVEMENT SERVICES		0
	32	TOTAL ESTIMATED EXPENDITURES		3,663,958
5000		<u>OTHER FINANCING USES</u>		
5100	33	Debt Service	7,000	
5200	34	Fund Transfers	48,537	
5300	35	Transfers to Component Units	0	
5900	36	Budgetary Reserve	0	
		TOTAL OTHER FINANCING USES		55,537
	37	TOTAL ESTIMATED EXPENDITURES AND OTHER FINANCING USES		3,719,495
	38	Appropriation of Prior Year Encumbrances		0
	39	TOTAL APPROPRIATIONS		3,719,495
	40	ENDING UNRESERVED FUND BALANCE		0
	41	TOTAL APPROPRIATIONS AND ENDING FUND BALANCES		3,719,495

<u>CODE</u>	<u>ITEM</u>	<u>AMOUNT</u>	<u>TOTAL</u>
6000	<u>REVENUE FROM LOCAL SOURCES</u>		
6100	Taxes Levied/Assessed by the LEA		
6111	Current Real Estate Taxes	0	
6112	Interim Real Estate Taxes		
6113	Public Utility Realty Tax		
6114	Payments in Lieu of Current Taxes State/Local		
6115	Payments in Lieu of Taxes - Federal Reimbursement		
6120	Current Per Capita Taxes Sec. 679	0	
6140	Current Local Enabling Taxes - Flat Rate Assessments, Act 511	0	
6150	Current Local Enabling Taxes - Proportional Assessments, Act 511	0	
6160	Non-Real Estate Taxes - First Class Districts Only		
6400	Delinquency on Taxes Levied/Assessed by LEA		
6500	Earnings on Investments		
6700	Revenue from Student Activities		
6800	Revenue from Intermediate Sources		
6900	Other Revenue from Local Sources		
6910	Rentals		
6920	Contributions and Donations from Private Sources		
6940	Tuition from Patrons		
6960	Services Provided Other Local Governmental Units		
6970	Services Provided Other Funds		
6980	Revenue from Community Service Activities		
6990	Miscellaneous Revenue		
	TOTAL REVENUE FROM LOCAL SOURCES		<u><u>0</u></u>

<u>CODE</u>	<u>ITEM</u>	<u>AMOUNT</u>	<u>TOTAL</u>
7000	<u>REVENUE FROM STATE SOURCES</u>		
7100	Basic Instructional & Operating Subsidies		
7110	Basic Instructional and Equity Supplement Subsidies		
7140	State Subsidies for Charter Schools		
7150	School Performance Incentive		
7160	Tuition for Orphans and Children Placed in Private Homes		
7170	Instructional Support Teams		
7180	Staff and Program Development		
7200	Subsidies for Specific Educational Programs		
7210	Homebound Instruction		
7220	Vocational Education		
7240	Driver Education - Student		
7250	Migratory Children		
7260	Job Training Partnership Act (JTPA)		
7270	Special Education of Exceptional Pupils		
7271	Special Education for School Aged Children		
7272	Early Intervention Program - Handicapped Children		
7280	Adult Literacy		
7290	Other Program Subsidies		
7300	Subsidies for Noneducational Programs		
7310	Transportation (Regular and Additional)		
7320	Rentals and Sinking Fund Reimbursements		
7330	Health Services (Medical, Dental, Nurse, Act 25)		
7350	Sewage Treatment Operations		
7400	Vocational Training of the Unemployed		
7500	Extra Grants		
7810	Revenue for Social Security Payments	51,161	
7820	Revenue for Retirement Contributions	39,338	
7900	Technology Grants		
	TOTAL REVENUE FROM STATE SOURCES		<u>90,499</u>

<u>CODE</u>	<u>ITEM</u>	<u>AMOUNT</u>	<u>TOTAL</u>
8000	<u>REVENUE FROM FEDERAL SOURCES</u>		
8100	Unrestricted Grants-in-Aid Directly from Federal Government		
8110	Payments for Federally Impacted Areas - P.L. 81-874		
8190	Other Unrestricted Federal Grants-in-Aid directly from the Federal Government		
8200	Unrestricted Grants-in-Aid from the Federal Government through the Commonwealth		
8300	Restricted Grants-in-Aid directly from the Federal Government		
8310	Payments for Federally Impacted Areas - P.L. 81-815		
8320	Energy Conservation Grants (TA) (ECM)		
8390	Other Restricted Federal Grants-in-Aid directly from the Federal Government		
8500	Restricted Grants-in-Aid from the Federal Government through the Commonwealth		
8510	Elementary & Secondary Education (ESEA), Education Consolidation and Improvement Act (ECIA), Individuals with Disabilities Education Act (IDEA)		
8511	ESEA, Title IV		
8512	Individuals with Disabilities Education Act, Part B (IDEA)		
8513	Education of Disadvantaged Children - ECIA, Title I	-156,881	
8514	Education of Disadvantaged Children - ESEA, Title I		
8515	Individuals with Disabilities Education Act, Section 619 (Preschool Grants)		
8516	Program Improvement Application - Title I		
8517	Capital Expense - Title I		
8518	Federal Funds for Charter Schools (for use by Charter Schools only)	438,400	
8519	Other Grants for ESEA and IDEA Programs		
8520	Vocational Education		
8521	Vocational Education - Operating Expenses		
8540	Nutrition Education and Training		
8550	Career Education Incentive Act		
8560	Federal Block Grants, ESEA, Title VI		
8570	Education for Economic Security Act (EESA), Title II		
8580	Child Care and Development Block Grants		

<u>CODE</u>	<u>ITEM</u>	<u>AMOUNT</u>	<u>TOTAL</u>
8600	Restricted Grants-in-Aid from the Federal Government through the Commonwealth		
8620	Adult Basic Education		
8640	Economic Opportunity Act (Headstart)		
8650	Energy Conservation Grants (TA) (ECM)		
8660	Job Training Partnership Act (JTPA)		
8670	Drug Free Schools		
8680	Educate America Act (Goals 2000)		
8690	Other Restricted Federal Grants-in-Aid through the Commonwealth		
8800	Medical Assistance		
8810	Medical Assistance Reimbursement (ACCESS)		
8820	Medical Assistance for Health Related Transportation and Administration, Title XIX		
	TOTAL REVENUE FROM FEDERAL SOURCES		<u>595,281</u>
9000	<u>OTHER FINANCING SOURCES</u>		
9100	Sale of Bonds		
9200	Proceeds from Extended Term Financing		
9300	Interfund Transfers		
9320	Special Revenue Fund Transfers		
9330	Capital Projects Fund Transfers		
9340	Debt Service Fund Transfers		
9350	Enterprise Fund Transfers		
9360	Internal Service Fund Transfers		
9370	Trust and Agency Fund Transfers		
9380	Activity Fund Transfers		
9400	Sale of or Compensation for Loss of Fixed Assets		
9500	Refunds of Prior Years' Expenditures		
9600	Incoming Transfers		
9610	Receipts from Other LEAs in Pennsylvania	3,033,715	
9620	Receipts from Out-of-State LEAs		
9640	Receipts from Member Districts - AVTS/Special Program Jointure (AVTS/SPECIAL PROGRAM JOINTURE ONLY)		
9700	Other Operating Transfers		
9710	Operating Transfers from Component Units		
	TOTAL OTHER FINANCING SOURCES		<u>3,033,715</u>
	TOTAL ESTIMATED REVENUES AND OTHER FINANCING SOURCES		<u>3,719,495</u>

CODE	ITEM	AMOUNT	TOTAL
1000	INSTRUCTION		
1100	Regular Programs		
100	Personnel Services - Salaries	881,504	
200	Personnel Services - Employee Benefits	249,500	
300	Purchased Professional and Technical Services		
400	Purchased Property Services	69,960	
500	Other Purchased Services	14,092	
600	Supplies	270,016	
700	Property	196,582	
800	Other Objects		
	TOTAL REGULAR PROGRAMS		1,681,654
1200	Special Programs		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services		
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL SPECIAL PROGRAMS		0
1300	Vocational Education Programs		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services		
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL VOCATIONAL EDUCATION PROGRAMS		0
1400	Other Instructional Programs		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services		
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL OTHER INSTRUCTIONAL PROGRAMS		0

CODE	ITEM	AMOUNT	TOTAL
1600	Adult Education Programs		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services		
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL ADULT EDUCATION PROGRAMS		0
1700	Community / Junior College Education Programs		
500	Other Purchased Services		
	TOTAL COMMUNITY / JUNIOR COLLEGE EDUCATION PROGRAMS		0
2000	<u>SUPPORT SERVICES</u>		
2100	Support Services - Pupil Personnel		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services	25,029	
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL SUPPORT SERVICES - PUPIL PERSONNEL		25,029
2200	Support Services - Instructional Staff		
100	Personnel Services - Salaries	161,000	
200	Personnel Services - Employee Benefits	13,545	
300	Purchased Professional and Technical Services	30,000	
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL SUPPORT SERVICES - INSTRUCTIONAL STAFF		204,545

CODE	ITEM	AMOUNT	TOTAL
2300	Support Services - Administration		
100	Personnel Services - Salaries	168,000	
200	Personnel Services - Employee Benefits	43,031	
300	Purchased Professional and Technical Services	25,000	
400	Purchased Property Services		
500	Other Purchased Services	5,000	
600	Supplies	1,000	
700	Property	58,000	
800	Other Objects		
	TOTAL SUPPORT SERVICES - ADMINISTRATION		300,031
2400	Support Services - Pupil Health		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services	52,000	
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL SUPPORT SERVICES - PUPIL HEALTH		52,000
2500	Support Services - Business		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services	12,000	
400	Purchased Property Services		
500	Other Purchased Services	61,034	
600	Supplies	17,820	
700	Property		
800	Other Objects		
	TOTAL SUPPORT SERVICES - BUSINESS		90,854
2600	Operation and Maintenance of Plant Services		
100	Personnel Services - Salaries	48,000	
200	Personnel Services - Employee Benefits	16,572	
300	Purchased Professional and Technical Services	30,630	
400	Purchased Property Services	643,909	
500	Other Purchased Services	100,754	
600	Supplies	77,028	
700	Property	32,000	
800	Other Objects		
	TOTAL OPERATION AND MAINTENANCE OF PLANT SERVICES		948,893

CODE	ITEM	AMOUNT	TOTAL
2700	Student Transportation Services		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services		
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL STUDENT TRANSPORTATION SERVICES		0
2800	Support Services - Central		
100	Personnel Services - Salaries	80,000	
200	Personnel Services - Employee Benefits	20,952	
300	Purchased Professional and Technical Services	260,000	
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL SUPPORT SERVICES - CENTRAL		360,952
2900	Support Services - Other Support Services		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services		
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL SUPPORT SERVICES - OTHER SUPPORT SERVICES		0
3000	<u>OPERATION OF NONINSTRUCTIONAL SERVICES</u>		
3200	Student Activities		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services		
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL STUDENT ACTIVITIES		0

CODE	ITEM	AMOUNT	TOTAL
3300	Community Services		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services		
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
800	Other Objects		
	TOTAL COMMUNITY SERVICES		0
4000	<u>FACILITIES ACQUISITION, CONSTRUCTION & IMPROVEMENT SERVICES</u>		
100	Personnel Services - Salaries		
200	Personnel Services - Employee Benefits		
300	Purchased Professional and Technical Services		
400	Purchased Property Services		
500	Other Purchased Services		
600	Supplies		
700	Property		
	TOTAL FACILITIES ACQUISITION, CONSTRUCTION & IMPROVEMENT SERVICES		0
5000	<u>OTHER FINANCING SERVICES</u>		
5100	Debt Service		
800	Other Objects	7,000	
900	Other Financing Uses		
	TOTAL OTHER FINANCING SERVICES		7,000
5200	Fund Transfers		
900	Other Financing Uses	48,537	
	TOTAL FUND TRANSFERS		48,537
5300	Transfers to Component Units		
900	Other Financing Uses		
	TOTAL TRANSFERS TO COMPONENT UNITS		0
5900	Budgetary Reserve		
800	Other Objects		
	TOTAL BUDGETARY RESERVE		0
	TOTAL ESTIMATED EXPENDITURES AND OTHER FINANCING USES		3,719,495

CODE

6111 Current Real Estate Taxes

<u>County #</u>	<u>County Name</u>	<u>Taxable Assessed Value</u>	<u>Mills</u>	<u>Tax Levy</u>	<u>% Collected</u>	<u>Estimated Revenue</u>
				0		
				0		
				0		
				0		
				0		
Totals		0		0		0

6120 Current Per Capita Taxes Section 679

<u>Rate</u>	<u>Estimated Revenue</u>
-------------	--------------------------

6140 Current Local Enabling Taxes - Flat Rate
Assessments - Current Act 511 Taxes

	<u>Rate Charged</u>	<u>Add'l Rate Charged</u> <u>(if applicable)</u>	<u>Tax Levy</u>	<u>Estimated Revenue</u>
6141 Per Capita Taxes				
6142 Occupation Taxes - Flat Rate				
6143 Occupation Privilege Taxes				
6144 Trailer Taxes				
6145 Business Privilege Taxes				
6146 Mechanical Device Taxes				
6149 Other Flat Rate Assessments (SPECIFY)				
Total Act 511, Flat Rate Assessments			0	0

6150 Current Local Enabling Taxes - Proportional
Assessments - Current Act 511 Taxes

	<u>Rate Charged</u>	<u>Add'l Rate Charged</u> <u>(if applicable)</u>	<u>Tax Levy</u>	<u>Estimated Revenue</u>
6151 Earned Income Taxes				
6152 Occupation Taxes - Millage				
6153 Real Estate Transfer Taxes				
6154 Amusement Taxes				
6155 Business Privilege Taxes - Millage				
6156 Mechanical Device Taxes - Percentage				
6157 Merchantile Taxes				
6159 Other Proportional Assessments (SPECIFY)				
Total Act 511, Proportional Assessments			0	0
Total Act 511, Current Taxes			0	0

Act 511 Tax Limit --->

$$\text{Market Value} \times \text{Mills } 0.012 = \text{(511 Limit) } 0$$

CASH AND SHORT-TERM INVESTMENTS

06/30/98 Estimate

06/30/99 Projection

- * General Fund
- * Special Revenue Funds
 - Athletic Fund
 - Section 690 Capital Reserve Fund
 - Section 1431 Capital Reserve Fund
 - Other Special Revenue Funds
- * Capital Project Funds
- * Debt Service Funds
- * Enterprise Fund
 - Cafeteria Fund
 - Other Enterprise Funds
- * Internal Service Funds
- * Trust Funds
- * Agency Funds

TOTAL CASH AND SHORT-TERM INVESTMENTS

0

0

LONG-TERM INVESTMENTS

- * General Fund
- * Special Revenue Funds
 - Athletic Fund
 - Section 690 Capital Reserve Fund
 - Section 1431 Capital Reserve Fund
 - Other Special Revenue Funds
- * Capital Project Funds
- * Debt Service Funds
- * Enterprise Fund
 - Cafeteria Fund
 - Other Enterprise Funds
- * Internal Service Funds
- * Trust Funds
- * Agency Funds

TOTAL LONG-TERM INVESTMENTS

0

0

TOTAL CASH AND INVESTMENTS

0

0

	<u>Amount</u>	<u>06/30/98 Estimate</u>	<u>Total</u>	<u>Amount</u>	<u>06/30/99 Projection</u>	<u>Total</u>
<u>SHORT-TERM PAYABLES</u>						
General Fund						
Other Funds						
Total Short-Term Payables			0			0
<u>LONG-TERM INDEBTEDNESS</u>						
Bonds Payable						
Extended Term Financing						
Agreements Payable						
Lease-Purchase Obligations						
Accumulated Compensated Absences						
Authority Lease Obligations						
Other Long-Term Liabilities						
Total Long-Term Indebtedness			0			0
TOTAL INDEBTEDNESS			0			0

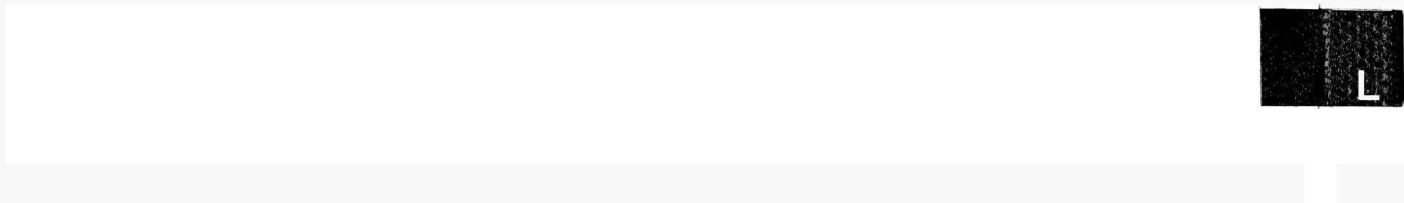
SCHEDULE OF BUDGETARY RESERVE APPROPRIATED AND ESTIMATED ENDING UNRESERVED FUND BALANCE

FOR THE PERIOD 07/01/98 THROUGH 06/30/99

0770	ESTIMATED ENDING UNRESERVED FUND BALANCE	0
5900	BUDGETARY RESERVE	0
	TOTAL ESTIMATED ENDING UNRESERVED FUND BALANCE AND BUDGETARY RESERVE	0
0799	TOTAL ESTIMATED ENDING RESERVED AND DESIGNATED FUND BALANCES NOT SCHEDULED FOR LIQUIDATION DURING THIS FISCAL YEAR (i.e. NOT INCLUDED ON PAGE 2 OF THIS BUDGET)	

Estimated Unreserved Fund Balance Justification:

Budgetary Reserve Justification:



WEST OAK LANE CHARTER SCHOOL LESSONS LEARNED

I. Laws & Regulations

- A. Research the state laws and regulations for charter school.
 - 1. Construction Issues
 - 2. Abilities to take on debt (short term vs. long term)
 - 3. Legal consultation
- B. Gain an understanding of the relationships that will exist w/ the charter school
 - 1. Dept. of Education
 - 2. Philadelphia School District
- C. Stay abreast of local/national challenges by other charter schools (CDC staff)
 - 1. Local newspapers
 - 2. Center for Education Reform
 - 3. National publications
 - 4. Websites

II. Facility/Financing

- A. Site selection
 - 1. Should be done at a minimum of 12 months in advance of the school opening.
 - 2. Essential to gain a construction development team (construction managers, architects, engineers, etc.) that is willing to work to develop the facility w/ a guaranteed maximum price.
 - 3. To bypass many of the restrictions placed on charter schools to construct the school site, prospective charter schools should do the following:
 - a. The charter school should seek to lease a facility as a first option where the landlord will pay for and reconstruct the space to fit the needs of the school.
 - b. This charter school should sublease from a CDC or other credible community organization to get the construction completely more timely. In PA, community groups or charter school developers do not have to go through bidding process or use union labor.
 - 4. From a CED perspective, CDC's should look to purchase the available facility and get a loan to finance the construction costs.
 - a. Repayment of this can be passed to the tenant the charter school through rent and leasehold improvements to repay the loan.
 - b. Having a staff member (i.e. Real Estate Developer) to monitor the day-to-day activities as the site develops and to make the necessary design changes timely.
 - 5. In cases where the CDC must develop the facility for the charter school owned by an independent landlord

- a. All financing and commitment letters should be obtained PRIOR to beginning the construction of the facility.
- b. The pressure of opening the school from the community should not be the driving force in completing the project, particularly when there is an obvious financial gap in completing the construction site.

III. Board of Directors

- A. Should be selected during the planning phase
- B. If being established by a CDC membership should be as follows
 - a. Majority of members should be from the CDC
 - i. Strategic planning skills/ political support
 - ii. Past school administrators
 - iii. Collegiate professors (elementary/secondary education)
 - iv. Technological backgrounds
 - v. General business skills (specialty nonprofit start-up)
 - b. Two-to-three parents
 - c. Others w/ skills pertaining to general focus of the school
- C. Willing to dedicate on average 8 to 12 hours per week during development phase
- D. Leadership is key (Board President sets the tone)
- E. Vision and shared philosophy
- F. Staff administrators from CDC should attend board meetings, as the school develops to spearhead the day-to-day activities that must take place in order for the school to become a reality.

IV. Programs and Curriculum -

- A. Acquiring educational consultants to assist the school w/ an integrated curriculum
- B. Gather a minimum of 3 curriculums in all subject areas to select
- C. Try to purchase from a single publisher for better costs rates and an "integrated curriculum" (math/reading/science curriculums)

V. Consultants (preferably non-profit)

- A. Investigate charter school firms and establish a grid of selection criteria
 - 1. Internet
 - 2. Universities
 - 3. National educational organizations
- B. Organizational capacity and focus
- C. Costs
- D. Services Provided
 - a. Development of Policy & Procedures
 - b. Flexibility
 - c. Financial consulting (budgets in required formats)

- d. Capital Fundraising
- E. Human Resources
- F. Staff selection
- G. Policy & Procedures
- H. Flexibility
- I. CDC w/ staff skills to stay on-top of consultants

VI. Management – Start-up & Ongoing Operations

- A. Transition between CDC and Charter School
- B. Executive Director/Principal w/ leadership and organizational skills
 - 1. Understands the function of the BOD
 - 2. Organizational structure (reporting) for the school
 - a. Principal – Instructional Components
 - i. Director of Curriculum (Reading/Math)
 - ii. Director of Technology (Science)
 - iii. Special Education Director
 - iv. Specialty Teacher
 - v. Lead Teachers for each grade
 - b. Vice Principal – disciplinarian
 - c. Director of Operations
 - i. All non-instructional components of the school (facility, security, custodial, substitutes, volunteers, disciplinary, monthly reports, after school program, daily enrollments, petty cash)
 - ii. Basic business skills and organizational management skills and ability to deal w/ kids
 - 3. Maintain relationships of parents, staff, and BOD

VII. Opportunities for CDC

- A. Property management
- B. Administrative/financial management

VIII. Political support is paramount

- A. State legislators
- B. Council Members
- C. Inroads to members on the local school board

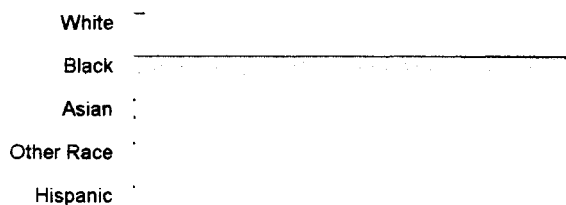
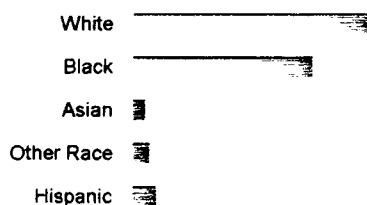
IX. General

- A. Maintain credibility w the community by being honest and forthcoming admitting that the CDC or the school won't have all the answers
- B. Monthly community meetings and involvement (i.e. communication in local neighborhood newspapers)
- C. **PLAN, PLAN, PLAN!!**

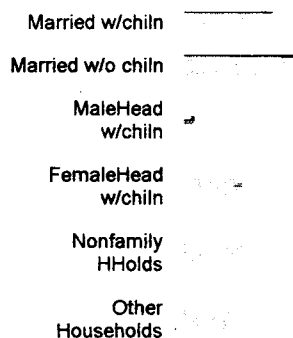
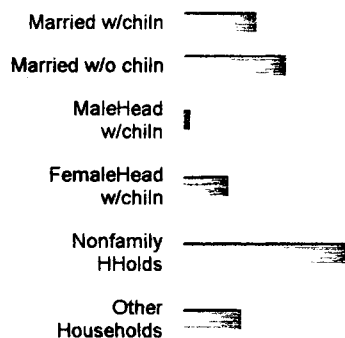
Demographic and Socio-Economic Profile: Ogontz Area Revitalization Corporation**Census Tracts in analysis: 262 263 264 265 266 267**Source: 1990 U.S. Census of Population and Housing

without Bar Graphs

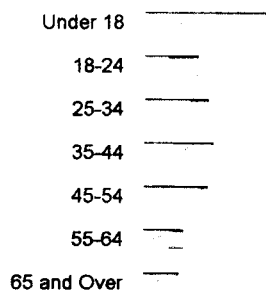
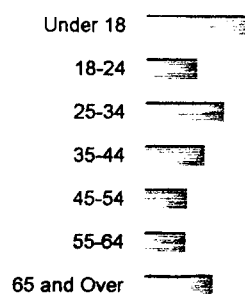
	Total	% of Total Persons	% of Philadelphia	Philadelphia	% of Total Persons
	n/a			n/a	
White	1084	2.50	0.12	848894	53.5
Black	41836	96.5	6.61	632430	39.8
Asian	150	0.34	0.34	43174	2.72
Other Race	252	0.58	0.41	61079	3.85
Hispanic	349	0.80	0.41	84186	5.30

Population:Ogontz Area Revitalization Corporation**Population:City of Philadelphia**

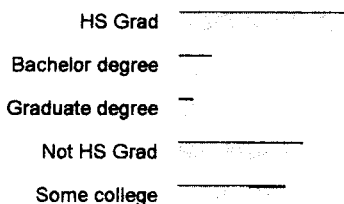
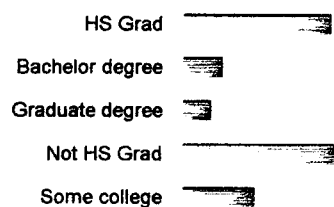
	Total	% of Households	% of Philadelphia	Philadelphia	% of Households
	n/a			n/a	
Married w/chiln	2832	19.7	2.91	97097	16.1
Married w/o chiln	3505	24.4	2.55	136965	22.7
MaleHead w/chiln	366	2.55	4.01	9119	1.51
FemaleHead w/chiln	1892	13.1	3.19	59170	9.84
Nonfamily HHolds	3278	22.8	1.49	219401	36.5
Other Households	2468	17.2	3.12	78988	13.1

Households:Ogontz Area Revitalization Corporation**Households:City of Philadelphia**

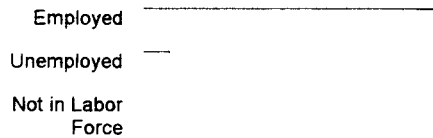
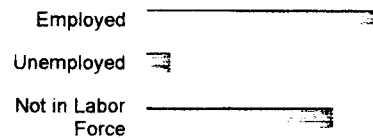
	Total	% of Total Persons	% of Philadelphia	Philadelphia	% of Total Persons
	n/a			n/a	
Under 18	11865	27.3	3.12	379287	23.9
18-24	5223	12.0	2.87	181457	11.4
25-34	6167	14.2	2.22	276654	17.4
35-44	6697	15.4	3.15	211934	13.3
45-54	6191	14.2	4.10	150948	9.52
55-64	3801	8.77	2.63	144091	9.08
65 and Over	3378	7.79	1.40	241206	15.2

Age:Ogontz Area Revitalization Corporation**Age:City of Philadelphia**

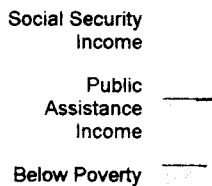
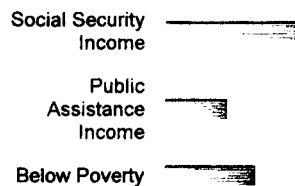
	Total	% of Persons over 25	% of Philadelphia	Philadelphia	% of Persons over 25
	n/a			n/a	
HS Grad	9838	37.5	2.91	337638	32.9
Bachelor degree	1946	7.41	2.13	91309	8.90
Graduate degree	888	3.38	1.37	64718	6.31
Not HS Grad	7290	27.7	1.99	365713	35.6
Some college	6272	23.9	3.79	165455	16.1

Education:Ogontz Area Revitalization Corporation**Education:City of Philadelphia**

	Total	% of Persons over 16	% of Philadelphia	Philadelphia	% of Persons over 16
	n/a			n/a	
Employed	21266	64.9	3.26	651621	52.3
Unemployed	1999	6.10	2.85	70000	5.61
Not in Labor Force	9332	28.5	1.80	518293	41.6

Employment:Ogontz Area Revitalization Corporation**Employment:City of Philadelphia**

	Total	% of Households	% of Philadelphia	Philadelphia	% of Households
	n/a			n/a	
Social Security Income	2839	19.7	1.49	189995	31.6
Public Assistance Income	1641	11.4	1.95	83969	13.9
Below Poverty	4354	10.0	1.38	313374	20.2

Income:Ogontz Area Revitalization Corporation**Income:City of Philadelphia**

	Total	% of Housing Units	% of Philadelphia	Philadelphia	% of Housing Units
	n/a			n/a	
Vacant Units	865	5.68	1.20	71824	10.6
Owner Occupied Units	12101	79.5	3.23	373940	55.4
Median Year Built	1944.6	13.5	103.	1876.5	0.31
Median House Value	44350	102.	70.6	62752.	3.95

Housing:Ogontz Area Revitalization Corporation**Housing:City of Philadelphia****How to read this Table-**

This Table is really two Tables in one—data about the CDC's service area(the first three columns) and data about the City of Philadelphia(the last two columns) which is provided primarily for reference.

Column 1 is the aggregate of all Census Tracts in the CDC's service area. For Median Household Income and Median Housing Value it represents the average of the medians.

Column 2 is the percentage of each variable(White, Black, Asian, etc.) to its Universe variable(Population, Household, etc.) for each CDC's service area. Mathematically, the calculations looks like this: (White/Population); (Black/Population); (High School Graduate/Total Persons Over 25).

Column 3 is the percentage of each variable for the CDC's service area to the same variable for the City of Philadelphia and the calculations look like this: (Service area population/Philadelphia Population); (Service area Households/Philadelphia Households).

Columns 4 and 5 are identical to Columns 1 and 2 only for the City of Philadelphia.

Copyright © 1999 Philadelphia Association of Community Development Corporations.

This document may be reproduced, copied or redistributed without permission of PACDC, however, the document, the design, and layout may not be modified in any way and the copyright notice must appear in each document.



Parents have added benefit for Charter Schools

By ARLENE EDMONDS
Correspondent

Northwest Philadelphia parents have an added educational choice for their children now.

If they are dissatisfied with the public schools, are too financially strapped or unwilling to make the monetary sacrifice for private or parochial school, and don't consider homeschooling to be a viable option, they soon will have a possible alternative.

Charter schools are coming to West Oak Lane. This September high school students can bypass either the Martin Luther King or Germantown high schools to attend the new YouthBuild High School. The organization which is noted for providing youth oriented programs particularly to young men "at risk" will now be expanding its scope to include providing a high school education.

By the fall of 1998, there will also be a charter elementary school from kindergarten to grade six sponsored by the Ogontz Avenue Revitalization Corporation (OARC) in conjunction with La Salle University. Eventually either YouthBuild or OARC will expand to possibly include a charter middle school by the fall of 1999.

"Since charter schools are new there are really pilot programs," said Andrea Thomas-Reynolds, executive director of OARC. "Education is a very sensitive issue for parents. They don't want to experiment with their child. They want what's best for their child. When they are not satisfied with what the public schools have to offer, they may move in order to find the education they want their children to have. Charter schools are a way to keep families in West Oak Lane."

OARC is currently in the application process for securing their charter school. During the last legislative session, Pennsylvania joined some 26 other states and the District of Columbia in educational reform which permits charter schools. Charter schools are operated under a charter form the local school board.

In the Northwest Philadelphia area The new legislation provides \$7.5 million in grants to assist school districts set up charter schools and another \$1 million in financial assistance. At least 75 percent of charter school staff must be certified teachers and tenured public school teachers can transfer to charter schools without penalty to their benefits or tenure.

Charters are given for no less than three years, but no more than five years. A school would have to renew its charter with the school board at the end of the charter period.

Thomas-Reynolds is particularly excited about the possibility of collaborating with a major area university in planning the OARC's charter school curriculum. They are planning a curriculum to focus on science and technology. The university will give input, materials and resources to the school in this area.

"We fell positive that this will benefit the children of this area. We have already been at the forefront spearheading the economic development of this community so it's a (natural) transition for us to be involved in the educational aspect of this community in an active way," she said.

The OARC executive director further pointed to the fact that charter schools in neighborhoods like West Oak Lane is vital. She pointed to the fact that West Oak Lane is "a borderline community."

A decade ago it was just seeing tangible evidence of a rebirth, but the quality of the public schools have lagged behind the economic development.

"I think most residential neighborhoods which are borderline have to seriously address education. This is the determining factor in whether you keep long time residents who add to the stability of any neighborhood. This is also a determining factor that families consider when buying a home in a particular area. If we want to stabilize West Oak Lane, then we can't ignore the educational aspect," said Thomas-Reynolds.

Where will the new charter schools be located? As of press time the exact locations could not be confirmed. YouthBuild has targeted four sites in North, South, and West Philadelphia as well as West Oak Lane. The organization is already five years old and have a track record dealing with young people.

Thomas-Reynolds sees OARC's charter school as a continuation of the fine quality education many area children receive at the NIA Center, 16th and Haines, in a preschool program ironically run by the School District of Philadelphia. While many parents are pleased with the program there which has limited classroom size and children receiving personal attention, they are

wary of public school classrooms with some 30 students.

Yet OARC's application is still in the infancy stage. By the fall there are more forms to fill out until the charter is finally granted. In the meantime a curriculum centered on logistics have not been worked out yet," admitted Thomas-Reynolds, pointing out she is optimistic about approval. "Right now it is a concept that we are developing. Eventually if we can put together a middle school we'll have our own charter school."

Charter School coming, OARC wants more

By ARLENE EDMONDS
Correspondent

A charter school is coming to West Oak Lane and before the doors open in September of 1998, the Ogontz Avenue Revitalization Corporation (OARC) want to hear from you.

For this reason the nonprofit community organization will hold a special community meeting tonight at the West Oak Lane Senior Center, 7210 Ogontz Ave., at 6:30 p.m. A follow-up session will be held next Wednesday, Nov. 12, at the senior center, again at 6:30 p.m.

The agenda will be an opportunity for those with children, who pay property-school taxes, or are just concerned about education to raise their voices.

"We started the school charter process last August," said Andrea Thomas-Reynolds, executive director of OARC. "We received a planning grant from the state's department of education. We have been working on that for the past months, but now is the first time for the community to have their input. We want all the ideas that we can get."

On hand will be representatives from the Edison Project, an independent group which are "public managers." They have successfully implemented charter schools in Massachusetts and Colorado, and

have expertise in educational reform, according to Thomas-Reynolds. Also on hand will be a charter school expert from Yale University and possibly other charter school supervisors.

One of the areas the Edison Project facilitates is getting the charter schools to reflect the community they serve.

Currently the OARC charter school will focus on science and technology with extensive interaction with LaSalle University.

As far as the other logistics and the exact curriculum, this has not been worked out yet.

"We want to hear what the community wants. We know that we will have to teach reading, mathematics, and science. There is room for other components. Does the community want the school to focus on African American history, for instance? Should the students wear uniforms? These are some of the questions we will be discussing," said Thomas-Reynolds.

Residents also have to decide the application process. For instance, if there

are only 600 students from kindergarten to grade six and 900 students apply for admission, what will be the criteria for those selected. Will it be academics or would it involve a lottery system? Thomas-Reynolds said it will probably be the latter.

"We do know that we will not split up families. We would probably go to a lottery but if one member of a family were admitted then the other members of the same family would be able to attend the school," she said.

The exact location of the charter school has not been identified. It will, however, be in West Oak Lane or as close to West Oak Lane as possible. If it's not in West Oak Lane it will be located in the part of East Mount Airy or East Germantown, which is adjacent to West Oak Lane.

OARC's target area embraces predominantly West Oak Lane but does extend as far west as Vernon Road and south into the Germantown-Logan area.

Another factor OARC is considering is building a charter cluster which extends up to 12th grade. Al-

though when the school opens next year it will only go up to sixth grade, eventually the community group wants to extend into the other years of middle school and even implement a full high school roster.

"We plan to add a grade a year. This way those who enter in sixth grade will be able to go all the way up in the school," said Thomas-Reynolds.

Also invited to the meeting are community persons who are interested in teaching at the school. The staff at charter schools must be made up of predominantly certified teachers, but there is some leeway for trained professionals or college graduates who don't have their teaching credentials.

"We are particularly interested in African American teachers who may be interested in leaving the public school system to teach at the school. Teachers do lose their tenures by teaching at a charter school and we understand that many may be unwilling to give that up. We are,

Continued on page 22

OARC . . .

Continued from page 10

however, developing our own tenure and other programs that would attract teachers," she said.

The Edison Project charter schools have a career ladder which encompasses all the charter schools they manage across the nation. Consequently, an OARC charter school teacher would retain tenure if they relocated to another charter school run by Edison in another state.

Thomas-Reynolds hopes that with his mobility teachers will come to Philadelphia from all over the country, and Philadelphia public school teachers, who are open to relocating in the future, will consider the option.

Furthermore, commu-

nity persons are needed to serve as the board of directors for the charter school. The management company will be working for the community development organization so if the board deems that the Edison Project is not providing the service they want they can opt for one of the many other management companies springing up around the nation as charter schools proliferate.

"We must have a separate board for the purposes of the grant. We want people who can bring us resources. We are looking for people like college educators. We already have persons from La Salle and Gwynned Mercy College interested in playing a role. The model will be based on programs from the University of Chicago," said Thomas-Reynolds.

Charter school In West Oak Lane in the works for '98

Editor's Note: Recognizing that the Chestnut Hill community has a strong interest in new developments in education, we assigned Marlena Ryan Karr to investigate the projected West Oak Lane Charter School.

by: MARLENA RYAN KARR

An important partnership has evolved in West Oak Lane. The Edison Project, whose accomplishments were detailed in the October 27, 1997 issue of *Time*, and the Ogontz Avenue Revitalization Corporation (OARC), recently recognized for its "dedication to financially rescuing that section of the city," have

come together to design the West Oak Lane Charter School. This new vision of OARC, coupled with Edison's plan of action, should come to fruition in September of 1998.

Andrea Thomas-Reynolds and John Ungar, executive director and economic director of OARC respectively, have many reasons for hiring the Edison Project to help them design a new school for the area.

"They bring the top academic programs into the classroom," says Thomas-Reynolds. "The math program was designed by the University of Chicago and the Success for All reading program was created at Johns Hopkins University," she continues.

Both Thomas-Reynolds and Ungar also agree that the Edison Project has helped to market OARC's mission: "to create and stimulate economic development and improve the quality of life in the West Oak Lane Community."

Led by the Chairman Benno C. Schmidt, former president of Yale University, the Edison Project was created in 1992. Thomas-Reynolds notes that Edison places a great deal of focus on parental involvement, which is an important need in Philadelphia schools. "One fourth of the school's curriculum has been left open so that parents may help to shape it," says Ungar.

According to Steven Tracey, Edison's Vice-President of Northeast

Development, "Leaving a portion of the curriculum open for community involvement gives OARC, as well as parents and citizens of West Oak Lane, the chance to include units on local history or culture. It also gives everyone a chance to address the distinctive needs of the West Oak Lane region, and to emphasize special programs that would be meaningful to the students and the community. The center of gravity of Edison is the quality of our schools.

"There will be a computer in every classroom and one in the home of each student from third grade on," he continues. "This is a trademark of Edison schools throughout the country. According to the *Time* magazine article, children in the Dodge-Edison school in Wichita, Kansas "are able to E-mail homework to themselves or their teachers, while parents can review their children's progress at home, communicate with teachers and E-mail other parents."

Finally, Tracey says that if the charter is granted, any child who wishes to apply to the school may do so. Students will not be hand-picked by Edison; they will enter on a first-come, first-serve basis. Teachers may apply if the charter is granted in February. "Edison is looking for teachers with outstanding backgrounds in public and private schools in West Oak Lane and in other surrounding communi-

ties," says Tracey. "The school year will be 205 days long (one month longer than the average school year)," he continues. There will also be five weeks of professional development for teachers, focusing on personal needs and technology.

Before hiring Edison, Thomas-Reynolds and Ungar did extensive research. "We visited several Edison schools in different states and attended Edison's first annual Client Conference. We met many satisfied principals, administrators and teachers there. We were also very impressed by what we saw happening in other Edison schools."

Thanks to a Charter School Planning Grant from the State Department of Education, OARC is off to a positive start with the West Oak Lane Charter School. They have already attended their first hearing with the Philadelphia Board of Education on December 3. Their next hearing is January 6. On February 9, 1998, the Board of Education will decide whether or not OARC will be granted the charter.

No location is set at this time for the charter school, but OARC is pursuing several possibilities. The projected opening is September 1998. Under the direction of Thomas-Reynolds and Ungar, OARC hopes to see their powerful plan for improvement unfold this spring.

PHILADELPHIA DAILY NEWS

February 19, 1998

Charter schools grow

Board OKs 11 more to open in fall

by Mensah M. Dean

Daily News Staff Writer

The options that Philadelphia parents have for educating their children will expand in September, when a new wave of charter schools opens.

The Board of Education yesterday approved the applications of 11 community-based organizations to move their charter concepts into motion. Seven applications were denied for substantive reasons, and two were withdrawn by the applicants.

Provided that a list of perfunctory district conditions are met, the 11 charters will join four that opened last September. They each operate under five-year contracts.

Among the approved schools is one in West Oak Lane that will focus on science and technology, a multiple-site African-centered school and one in South Philadelphia that plans to feature smaller classes and diagnostic testing of students.

Charter schools operate with public money, but they are independent of nearly all the mandates that public schools must follow. The schools are in control of their budgets, curriculums and who they hire and fire.

That independence, charter supporters say, makes the schools better able to educate students and provides needed competition to school districts.

"I think people are starting to realize that there is not a one-size-fits-all model for education," said Jeanne Allen, president of the Washington-based Center for Education Reform.

Her organization projects that just under 1,000 charters will be in operation nationally come September.

Christine Thomas Wiggins, a 12-year School District teacher, was beside herself with joy after she learned her Imhotep Institute will be among them.

"We will center our school around the needs of our children and the community," she said.

Named for an ancient Egyptian thinker, the school will be African-centered with an academic focus on math, science and technology.

To be housed in four locations, Imhotep will serve grades 9 through 12 and will start each day at the unusual hour of 2 p.m.

"Our children learn better that part of the day," Thomas Wiggins explained.

"Also, we have a lot of young people who because of situations at home ... would benefit from having a school that starts later," she said.

See SCHOOLS Page 39

SCHOOLS

Continued from Page 7

Andrea Thomas-Reynolds believes the West Oak Lane Charter School that she is helping to create will benefit both its first 600 students and the community where the school is located.

"We think this is wonderful for the residents of West Oak Lane, because they helped to develop it," she said of the school, which will be located at Godfrey Avenue and Broad Street.

The school's theme will be science and technology and computers will be in each class, she said. Also different will be West Oak Lane's school year, 205 days as opposed to about 180 for the district. The school day will also be longer by one to two hours.

West Oak Lane is sponsored by the nonprofit Ogontz Avenue Revitalization Corp., of which Thomas-Reynolds is executive director. Tapped to run it, she said, is the Edison Project, a school management company that manages 25 charter schools with 1,300 students nationally.

Directors of the Christopher Columbus Charter School are now looking for a building in South Philadelphia to house the school that is the brain child of a consortium of civic leaders, the Phila-

delphia Federation of Teachers and state Sen. Vincent Fumo.

Howard Kane, a member of Fumo's staff, said talks are ongoing with landlords of three properties that are suitable to host a school. Kane said the school's backers want to create a model of education to be duplicated by the district.

In doing so, he said, it is hoped that the school will serve as an agent to keep families from fleeing the city.

"Every poll, every survey focus group has shown that people leave because of the school system and the quality of education," he said.

Christopher Columbus will open to 320 elementary grade students. Featured will be small classes of no more than 20 students, a school-wide curriculum and testing of students at the start of the year so teachers can work with them on a more personalized basis, Kane said.

The other new charter schools are:

Center for Economics and Law; Eugenio Marja De Hostos Community Bilingual School; Family School; Laboratory School of Communication and Languages; Lincoln; Multi-Cultural Academy; Preparatory; West Oak Lane; and Women's Christian Alliance. ■

WEST OAK LANE • MOUNT AIRY • CHELTENHAM

The Leader

2385 West Cheltenham Avenue • Suite 182 • Philadelphia, Pa. 19150 • (215) 885-4111

Vol. 35 • No. 51

February 25, 1998

50 cents

Approval given Charter School

***West Oak Lane
has much to wait
for in September***

By Arlene Edmonds

The West Oak Lane Charter School is officially coming to Northwest Philadelphia next September. The Ogontz Avenue Revitalization Corporation (OARC) recently received the final approval to implement a local charter school which will include grades kindergarten to fifth with special emphasis on

mathematics, science and computer technology.

Though the OARC staff and temporary charter school board of trustees were moving along with their plans as if the charter school was definite now that they're official it will be full speed ahead.

"We are so very excited" said Andrea ThomasReynolds, executive director of OARC. "It was John Ungar (OARC's director of economic development), Steve Tracy from our partner

Continued on page 13

Charter School becomes real event

Continued from page 1

the Edison Project and myself who were at the school board hearings. Before we knew it they had announced that we were one of 11 applications to be approved. There were seven who were denied and two withdrew."

Ungar noted that it was an apprehensive wait as they had to sit through all the school board decisions and discussions before they came to the charter school issue on the agenda. "Since we are called the West Oak Lane Charter School we were the last ones to be announced, so it was sort of dramatic as we waited," he said.

Last week the board began mapping out their plans to begin hiring a staff. To be hired will be a principal, house directors, a technical director, lead and senior teachers to mentor younger or newer teachers, and all other staff members including secretaries and maintenance staff. There will be a total of 57 slated employment opportunities.

"We are looking for people like the world language teacher. The language at the school will be Spanish. We will also need an art teacher, a physical education teacher, a music

teacher, reading, science, math and all the other subjects, a special education teacher and a school psychologist," said Ungar.

Another community meeting will be called to let the neighborhood know how they can officially begin submitting applications for employment or to be part of the student population.

For at least its first year of operation the charter school will be located on the campus of the Pennsylvania College of Optometry. The institution is planning to relocate to Montgomery County this spring leaving on the Eye Institute on its campus around 13th Street and Godfrey Avenue. Available space will eventually be leased to Community College of Philadelphia in the 1999 or 2000 academic year.

"We expect to have a busy summer getting everything set up after the College of Optometry moves out. We will have to discuss how we will phase in this transformation. The buildings are all in good condition and were used as an educational facility already, but we do have some issues like safety since we are dealing

with elementary school children," said Thomas-Reynolds.

The permanent home of the West Oak Lane Charter School will be adjacent to the Nia Center, 16th and Haines Street in the heart of West Oak Lane. The structure located at 1536 Haines Street along with an adjacent lot will be transformed into the charter school. It is hoped that the building will be physically attached to the Nia Center.

OARC's executive director pointed out that there are still logistics to be worked out. They will discuss the architectural design with professionals and come up with a concrete plan during the next year.

"We want this to be a top notch educational facility. The Nia Center is this kind of a facility and we want the school to be of that quality," she said.

As if OARC's plate is not already full with the recent completion of the Southeastern Pennsylvania Regional Employment and Training Center, now it's time to develop the charter school. That's not all that's happening in West Oak Lane either. The

old Erlen Theater on Cheltenham Avenue was condemned and is being demolished.

"We have some ideas but we haven't devised a plan for that site yet," said

Thomas-Reynolds. Furthermore, there are also plans for the lots adjacent to the training center on East Haines Street north of Stenton Avenue.

"One thing I've learned

is that there's always something happening in West Oak Lane. You finish one project and before that's even completed something else is happening. As soon as we finish one another one's on it's way," said Thomas-Reynolds.

West Oak Lane Charter School to become reality

by MARLENA RYAN KARR

The West Oak Lane Charter School, which existed only as a concept when the Local first covered it in November 1997, is becoming a reality for September 1998. On February 9, the Board of Education approved a conditional charter for the school which means that the Ogontz Avenue Revitalization Corporation (OARC) may begin to hire staff and carry out other measures necessary so that the school may open in the fall.

"Of course, we must comply with certain things," said John Ungar, Director of Economic Development for OARC. "We need to prove that we're organized as a non-profit group, we need to lease a facility, and present background checks on the people hired, things like that."

Ungar described a conditional charter as a vote of confidence from the Board of Education. He said that the first step will be to hire a principal, in cooperation with the Edison Project, the for-profit team hired by OARC to help in the planning and development of the school. "The principal will then hire the rest of the staff," according to Ungar.

The staff will consist of 56 people, 24 of whom will be teachers. The school will open as a K-5 school in a temporary facility. Ungar said that OARC plans to fund-raise in order to build their own facility.

"We will hold a community meet-

ing in March where we will give out applications for the school and share information about it. We will then hold a Lottery in April to decide who will attend, since we estimate that we will have more applicants than we can accommodate," Ungar remarked.

West Oak Lane Charter School is currently the only Edison school in Philadelphia and in Pennsylvania. However, eleven other charter schools were conditionally approved for the city of Philadelphia, says Ungar.

Recently, Ungar and Andrea Thomas-Reynolds, Executive Director of OARC, attended a meeting sponsored by Foundations, a technical assistance center at Drexel University. There, they had the opportunity to meet with some representatives from other charter schools and the State Department of Education. "We will attend monthly meetings like this one because it is important that charter schools work together and help each other out whenever possible so that they can succeed."

OARC still needs to report back to the Board between now and September, but as long as they comply with the Board's requests, things should go as planned. "We have a lot of work ahead, but we feel confident that we will get things up and running by September and are very excited about this!"

DEADLINE:

4:00 PM MONDAY

CLASSIFIED WANT ADS

TO BUY • TO SELL • TO RENT • TO HIRE • HELP WANTED • LOST & FOUND • 885-4111

CHECKS



WEST OAK LANE CHARTER SCHOOL

The Board of Trustees of the West Oak Lane Charter School and The Edison Project are pleased to announce a search for the Principal & Teachers of the West Oak Lane Charter School. The West Oak Lane Charter School is a new public school operating under Pennsylvania's pioneering charter school law. It is open to all children, without tuition.

The West Oak Lane Charter School will welcome students in kindergarten through grade 4 in the fall of 1998, and will expand to grade 5 in 1999-2000. Students will be selected on an equal opportunity basis from throughout the city. There will be no entrance examination. Edison's innovated school design features:

- An academically challenging curriculum for all children •
- Extensive use of technology, including a computer in each student's home •
- Instruction in math, science, and Spanish beginning in kindergarten •
- A longer school year, and an extended school day •
- Committed educators backed by a strong program of professional development •
- Students work with the same team of teachers for several years •
- A close partnership with parents •

The positions of Principal and Teachers are open for application by all qualified candidates. Candidates for Principal should hold a Master's degree and have at least eight years of successful teaching and administrative experience. Candidates for teachers should hold a Pennsylvania Teaching Certificate or temporary teaching certificate waiting for Pennsylvania Certification. Candidates are invited to send a letter of interest and a current resume to:

West Oak Lane Charter School
PRINCIPAL AND TEACHER SEARCH COMMITTEE
7178 OGONTZ AVE.
PHILADELPHIA, PA 19138

WEST OAK LANE CHARTER SCHOOL

The **Edison** Project
Equal Opportunity Employers

7/8/98

Charter School applications available in West Oak L

chool applications set for charter kids

By Arlene Edmonds

Those interested in the charter school option for their Northwest Philadelphia elementary school pupils have until Friday, July 31 to submit applications. With still 89 slots available for the fall of '98, the West Oak Lane Charter School has extended its application period for those in grades one to four.

The West Oak Lane Charter School is also still making a call to teachers interested in positions with the new school. The school is currently under construction on Stenton Avenue and Washington Lane. The state-of-the-art facility has already narrowed down the

principal search list and is looking forward to the new principal conducting teacher interviews.

It was last Thursday Andrea Thomas-Reynolds, executive director of the Ogontz Avenue Revitalization Corporation (OARC), John Unger, OARC's director of economic development, and Gail Bennett OARC's communications officer, sat down with these new

newspapers to update the community on the charter schools. OARC is the non-profit local organization which has the charter to run the publicly funded independent school.

"This is a very exciting time for the West Oak Lane Charter School," said Thomas-Reynolds pointing to the fact that all projected timetables are on schedule. "We are excited that the school will be opening soon to provide

quality education for some students in this area. This ties in with OARC's mission statement. The official mission statement of OARC is "to create and stimulate economic development and improve the quality of life in the West Oak Lane community."

Thomas-Reynolds said that the new charter school will be good for families in the community, thus enhancing the quality of life.

"The quality of education is what people look for when they move into a new community. It can also be the determining factor whether or not people stay in a community, like West Oak Lane, or move to the suburbs," said Unger.

"This charter school will help keep middle class families here. We don't want them all fleeing to the suburbs. In order to stabilize this community and continue in the economic growth we need those young families with kids to stay and keep moving in."

Consequently, the OARC staff and volunteer board of directors along with the charter school's board are moving progressively forward. Unger pointed out that now they are taking care of the "nitty gritty stuff."

This includes transforming an old supermarket into classrooms, offices, and other educational space. OARC is also busily selecting school books, desks and other furniture items, and later will come finalizing the decor.

Yet Unger is quick to point out that the main pri-

ority is still the quality of education. The charter school will still emphasize science and computer technology. Along this line the school is being wired to accommodate not only a computer laboratory but also computers in every classroom.

The school is also aggressively enrolling new students. Many are coming out of the School District of Philadelphia schools. Still others are leaving area parochial and private schools opting for an education at no cost to the parents, but out of the traditional public school mainstream.

The charter school completed its first round of student applications last June 20. It has 548 student slots from kindergarten to grade four. During this first period some 459

applications were officially submitted.

By this Friday, July 10, those who previously applied and want to be enrolled in September must submit certain forms and materials. These are a request for student records form, evidence of enrollment form, and a copy of the child's most recent report card. Parents will also be expected to sign a parental involvement agreement later this summer.

"We still have openings in every grade except kindergarten. Since we had such an overwhelming response to kindergarten this grade had to be formally closed. Parents who have kindergarten children are still invited to pick up applications and have their child placed on a waiting list," said Unger.

Applications for grades up to four can be picked up from the OARC office, 7178 Ogontz Ave. In the event that there are more applicants than student slot an open lottery will be held. All applications received on or before July 31 will be eligible for the lottery. The public lottery will be held in a convenient Northwest Philadelphia location with all parents invited to sit in.

Teachers interested in positions can also pick up their applications at the OARC office. The school has already begun the preliminary application process for teachers. As soon as the principal has signed the dotted line he or she will begin the final teacher interview phase.

For information about the West Oak Lane Charter School call 927-5440.

Parents thrilled at differences in charter school

By Arlene Edmonds
Tribune Correspondent

West Oak Lane is a predominately African-American Philadelphia community that has become an urban renaissance model with the commercial redevelopment efforts of the Ogontz Avenue Revitalization (OARC) and the residential restoration efforts of the West Oak Lane Community Development Corporation (WOLCDC). Still keeping three steps ahead of most other neighborhoods they are in full gear to embrace educational reform.

This was no more evident than at the parent's meeting for the new West Oak Lane Charter School held last Tuesday evening. It was standing room only as over 600 parents overflowed the sanctuary of the St.

Peter's Evangelical Lutheran Church, 74th Avenue and Briar Road.

Excitement loomed high as there was spontaneous applause from these African-American parents when they learned the school would have 24-hour security, uniforms that could be purchased off the rack at Kids R Us and that the school would not only have three computers per classroom, but state-of-the-art Internet access.

"I first heard about the charter school when I read it in the *Tribune*," said Lydia Dunlap of West Oak Lane, whose six-year-old son, Omar Gregory Young, is already enrolled in the first grade at the quasi public school.

"Since I always volunteered when my son was in kindergarten

at Rowen, what attracted me to the charter school was the parental involvement and the educational program," said Dunlap. "When my son was in kindergarten at Rowen, he never had homework and he was even assaulted by a teacher. I had him transferred out of that class into a multi-level classroom with first graders and then he received homework.

For Denise Brown, also of Mount Airy, the attraction was the Success for All reading program, tutorial services, an afterschool program and smaller classrooms than traditional public schools. In fact, Brown is transferring her seven-year-old daughter out of a private African-American school to attend the West Oak Lane Charter School.

"I am willing to try their educa-

tional program, especially since now I won't have to pay tuition," said Brown. She also added that she liked the fact her daughter would continue wearing a uniform. She noted "there won't be any fashion statements" and she won't experience "what my son did at Leeds when someone held a gun to him for his jacket."

The meeting began with opening remarks from Sharmain Matlock-Turner, president of the West Oak Lane Charter School's board of trustees. Other board members are Horace Smith, vice president; Vall Adams, secretary; Marlene Owens, treasurer; Ronald Drayton, and Kathy Clupper.

A welcome was delivered by state Rep. Dwight Evans of West Oak Lane. Evans is a longtime sup-

porter of educational reform including Pennsylvania's charter school legislation. Evans is also one of the founders of OARC, the non-profit neighborhood group who is spearheading the charter school.

"I was asked by someone here what was my mission," said J. Kent Horton, the school's principal. "I said it's not about my mission, but it's your mission. We will just have to go along with it." Also on hand was the school's assistant principal, Doris Bentley. She outlined the extended school day from 8 a.m. to 3:30 p.m., and the fact that the school will be air conditioned, have wall to wall carpeting and all new furniture. She said classroom size is capped at 28 students and there is an extensive after school curriculum

(Continued on Page 2-B)

Parents discover the good at charter schools

(Continued from Page 1-B)
from 3:30 to 6 p.m. at an additional cost per student.

Many parents were enthused about the Success for All reading program. Students in this program are divided into groups and are reassessed for their group level, which cuts across grades every eight weeks, according to Bentley. Emphasis is on reading to improve comprehension, vocabulary building, summarizing, pre-

dicting and story-related writing. The research-based program was developed by Johns Hopkins University.

"This is the uniform the children will be wearing," said Horton, who was wearing the dark trousers, white shirt, and printed tie. "I will basically be wearing the same uniform as the (students). You don't have to go to an expensive uniform company who is making a profit

on the uniform. There will also be a gym uniform worn once a week, which will be sold at the school at cost."

Parents had numerous questions of the administration and faculty. They learned that 83 percent of the teachers are certified and the remaining will soon receive their full credentials. There will be rotating teacher's aides and parental volunteers in the classrooms are needed. There will also

be a part time nurse for the 548 student population.

The West Oak Lane Charter School has already finalized their enrollment. There are now waiting lists for every grade. Currently enrolled students will be given reregistration preference in February and then open applications will be taken for the 1999-2000 academic year. For more information about the charter school, call (215) 549-2147.

Friday, August 21, 1998

David Boldt

Alarms and Diversions

New school showcases commitment by parents

It was a dark and stormy night, but St. Peter's Evangelical Church was filled early with many of the parents who will be sending their kids to the new West Oak Lane Charter School next month.

For two hours, they asked questions that validated the latest research on the attitudes of black parents toward education — and blew apart some of the myths.

The biggest myth, which comes up in many debates about urban education reform, is that black parents in working class neighborhoods like West Oak Lane don't care much about education and wouldn't know what to do with options like charter schools and tuition vouchers if they got them.

Yet every one of the 548 slots in the school, which will go from kindergarten through fourth grade its first year, is filled, and there is a waiting list of more than 200.

The West Oak Lane Charter School is somewhat different from the four charters already in operation and the eight new ones that will open in the city this fall.

To begin with, it's bigger. And while other charters have aimed at filling special niches, such as emphasizing math and science, the West Oak Lane school's promise is simply to be better.

While other charters have drawn students from across the city, the West Oak Lane charter is a neighborhood school, meaning there will be a noticeable number of empty desks in the area's public elementary schools. The hope is that this will provide an incentive for those schools to improve and halt the exodus.

The enthusiastic response to the school underlines the principal finding of "Time to Move On," a recent Public Agenda study of parental attitudes: Black parents "seek with single-minded resolve ... academic achievement for their chil-

The study specifically refutes the idea that the primary interest of black parents is (or should be) racial integration. While they believe it would be a good thing, they doubt that by itself, integration will improve academic achievement.

Nationwide, more than 80 percent of black parents, given the choice between higher academic standards and racial integration, gave higher academic standards the top priority. Less than 10 percent picked racial integration.

The West Oak Lane school makes no claim to racial diversity. It will be well over 90 percent African American, and the subject of racial balance of the student body never came up during the meeting.

This lack of concern about racial diversity, which often seems to be the central preoccupation of policymakers, also holds true when it comes to hiring school leaders and teachers, according to Public Agenda.

Over three-quarters of the black parents polled said they wanted the best candidates hired, regardless of race.

No one at the West Oak Lane meeting seemed bothered that Kent Horton, the new principal, is white. A one-time insurance executive who switched into education, he most recently headed the St. Augustine parochial school in the South Bronx, where students made dramatic gains on standardized test scores.

On average, the staff has eight years of teaching experience. Many are African American, including assistant principal Doris Bentley, who had been in charge of the "learning communities" program at Fidler Elementary School in Germantown.

The only reference to the racial makeup of the staff during the meeting came from a father who hoped there would be some African American men to serve as role models for young boys in the school. Three of the teachers are black males, Horton replied.

An applause meter would have shown the truth of another finding from many studies about what parents want in their children's school: a safe, orderly environment.

There was a modest round of applause for the fact that there will be computers in every classroom, but louder applause for the announcement that security guards will be on hand to greet students, and even more when Horton reiterated that there will be a school uniform, which he was wearing.

It remains to be seen whether the school, still under construction in an erstwhile supermarket at Stenton Avenue and Washington Lane, will achieve its goals, but there is no mistaking the parents' high hopes.

David Boldt's column appears on

Charter school opens in WOL at right time

By Arlene Edmonds

West Oak Lane Charter School will officially open its doors on Tuesday, Sept. 15, and it's not a moment too soon. Perhaps this was no more evident than at a parents' orientation session held recently at a West Oak Lane church.

More than 600 overflowed

the sanctuary of the St. Peters Lutheran Evangelical Church, 74th Avenue and Briar Road. Parents were able to meet the new principal and other staff members, learn more about the quasi public school including an afterschool enrichment program, and have their

Charter School opening in WOL ...

Continued from page 1
countless questions answered.

The meeting opened with greetings from Sharmain MatlockTurner, president of the West Oak Lane Charter School Board of Trustees. A special welcome was delivered by state Rep. Dwight Evans of West Oak Lane, one of the supporters of the charter school and founder of the Ogontz Avenue Revitalization Corporation (OARC), which will be running the school.

"We hope that you're as excited about the grand opening of

West Oak Lane Charter School as we are," said J. Kent Horton, school principal.

"We will be having a grand opening in which we are inviting all the students, the staff, and the community to come out and celebrate."

Horton brings to the school 17 years of experience in education and the business world. Most recently Horton was principal of the St. Augustine School in the Bronx, N.Y. He was formerly both vice principal and middle school teacher at St.

University, a Master of Science in Education degree and professional diplomas from Fordham University. He is currently a doctoral candidate in school psychology at the latter. He is a member of numerous educational and psychological organizations.

"I was asked by someone what was my mission. It's not my mission, but it's our mission, it's what you want for the school. You make the mission and I just go along with it, said Horton.

Parents also met Doris Bentley, the school's vice principal. Bentley gave an overview of the curriculum which is centered on science and technology as well as logistics about the building. The school is state-of-the-art equipped with computers in every classroom as well as air conditioning and wall to wall carpeting throughout.

Classroom sizes at the school are slightly smaller than most Philadelphia School District classes. While the school district caps classes at 33 students and some have even more if there is an additional teaching assistant, classes

ing teachers "were working towards certification."

Each classroom would have an aide in addition to the regular teacher. However, these aides rotate throughout the school. Parental volunteers would, therefore, be encouraged to fill in the gap.

The West Oak Lane Charter School will have a student population of 548 students, according to Horton. Since there must be a school nurse for every 1,500 students there will be a part time nurse at the school. Horton is CPR certified and many of the teachers are currently being certified by the American Red Cross.

"We will have 24-hour security," said MatlockTurner, who drew the applause of the full crowd of parents from communities like West Oak Lane, Mount Airy and Germantown. "Besides security guards we have surveillance cameras."

Many parents wanted information on the "After School Enrichment Program." While the school day runs from 8 a.m. to 3:30 p.m., this program picks up at 3:30 p.m. and

There are also chess, gym games, and even cooking classes.

The school also boasted of their uniform policy. Even Horton and some of the staff members will wear the off the rack simple, streamlined uniforms. Parents applauded the announcement that their students would be wearing these.

"I really like uniforms because there won't be any fashion

statements," said Denise Brown of Mount Airy. "My son who went to Leeds (Middle School) was held up with a gun by someone who wanted to take his jacket. I also like that they won't be using one of those expensive uniform companies. When my daughter wore uniforms before they cost me over \$100 to outfit her."

Perhaps no one was more excited about the charter school than Lydia Dunlap of West Oak Lane. Her six-year-old-son Omar Gregory Young will be in the first grade.

"I think it's just wonderful. I can't wait for him to start at the West Oak Lane Charter School," she said.

8/26/98

WOL Charter School has all the answers

By Arlene Edmonds

Imagine a school whose decor was bright and airy, showing soft and calming pastel colors.

Every classroom had new wall to wall carpeting, clean blackboards, new desks and windows.

The computer laboratory, cafeteria, library, and auditorium space was all state-of-the-art. Plus on orientation day, one was greeted by every member of the administrative staff as well as the area's elected officials.

This was the scene at the West Oak Lane Charter School last Friday afternoon when the quasi-public school opened its doors to 500 students and their parents.

The school located on Stenton Avenue and Washington Lane was slated to begin classroom instruction Tuesday.

On hand for the special event were state Rep. Dwight Evans of West Oak Lane, founder of the Ogontz Avenue Revitalization Corporation, which is operating the publicly

funded community school.

Also present was OARC and charter school president Sharmain Matlock-Turner, 9th District Councilwoman Marian B. Tasco, OARC and charter school board members, and many parents who largely came from the surrounding Mount Airy and West Oak Lane communities.

"The school is so warm and inviting," said Doris Newton of Friends of OARC, the volunteer arm of the non-profit community development organization. "I didn't get a chance to go on the complete tour, but I did go into all the kindergarten rooms."

Newton said she found teachers warm and friendly and the "classrooms are so cheerful."

"It's just a stimulating environment for children to learn in," she said.

Many in the community were concerned that the old Mount Airy Shop 'N Bag and later Cousin's supermarkets could never be transformed into an ele-

mentary school. Just looking at the exterior of the brightly colored red and yellow building is deceiving.

Newton admitted that she, too, wondered how the building would turn out. "When you look at the outside of the building it looks okay. Then you know how the supermarket looked. Yet you just can't imagine how the inside looks with out walking inside," she said. "It's amazing and I know the parents and students appreciate it."

Kindergartners received a special thrill as By Land and Sea, the pet store, adjacent to the school on Washington Lane, brought a live rabbit for the day. The store will adopt the school next month at a special dedication and grand opening ceremony.

Other classroom students were greeted with special treats from their home room teachers. Many had cameras on hand taking pictures of all the special visitors to the school last Friday.

Kimberly Turner, communications officer for Evans, did not get an official head count on how many came through the building, but an unofficial survey of the teachers told her that virtually "every student and parent had come through."

In fact, many teachers had 100 percent attendance and took class pictures.

"The parents were most impressed with how bright the building was. The students were so enthusiastic about the building. Dwight Evans, of course, was beaming and many of the parents spoke individually to him as well as principal Kent Horton about their vision for the school," said Turner.

Parental involvement was already evident at the open house.

Matlock-Turner, OARC's director of development John Unger, and board members Vall Adams were giving guided tours to all those who were interested.

OARC's staff was on hand giving information to parents.

Perhaps no one was more elated about the school than Evans. With educational reform on the top of his legislative agenda and as an ardent supporter of charter school, the school's completion in his district by the non-profit group he founded, was a dream come true.

City & Region

Tuesday, November 10, 1998

Philadelphia Online: <http://www.phillynews.com>

Two charter schools in city get off to a rocky start

One was closed for fire-code violations. Another lost its principal. Most agree it is too early to draw conclusions about charters.

By Susan Snyder
INQUIRER STAFF WRITER

A year ago, it would have been difficult to find a more fervent believer in the charter-school movement than Grace Ciliberti.

A social studies teacher at South Philadelphia High School, Ciliberti and a colleague began dreaming about a small high school immersing students in the world of finance

and entrepreneurship, where everyone would work as a family so students would learn more, learn it better, and learn it faster.

But when her dream finally took wing with the opening of the Center for Economics and Law Charter School at Fourth and South Streets this fall, a disillusioned Ciliberti could not bail out fast enough.

"It's one thing to write out a plan of action,

it's another thing to implement it," said Ciliberti, who resigned from the school's board of directors in September. "I can see why schools become centralized."

On Oct. 28, the school closed after city inspectors discovered that the fire-alarm and sprinkler system did not work. State education officials already had expressed serious concerns about the school's education plan, student discipline and staffing levels in an Oct. 15 letter to the Philadelphia School District.

The district has cut off funding to the school until concerns are satisfied.

The students, who numbered about 180 in the ninth and 10th grades at the beginning of the year, are returning to their regular public schools or are staying home, according to Barbara Love, who taught English and biology before quitting Sept. 30.

Meanwhile, parents at the West Oak Lane Charter School, which also debuted this year, have complained about computer shortages, frozen sandwiches, the lack of homework, and the abrupt resignation of the principal last month.

While the charter-school movement in

See **SCHOOLS** on B8

Phila. charter schools have rocky start

SCHOOLS from 51 in Pennsylvania, less than two years after being billed as a desirable alternative to the regular public school system, these two charters — one, nine that opened in the city last September — show that running a school is not as easy as ABC. Most agree that it is too early to draw hard conclusions about charter schools independently operated and funded with public tax dollars, yet exempt from some state regulations.

Some say there are weaknesses in the charter system. Did Philadelphia move too fast in allowing 13 charter schools — 35 are operating in Pennsylvania — to open in the city? Is there enough oversight? Who is in charge?

This really amplifies or highlights the difficult position for school boards," said Thomas Gentzel, the Pennsylvania School Boards Association.

Under the charter-school law, school boards must review and approve charter applications and then, out of the way and let them operate, but they also have the responsibility to monitor performance and to revoke the charter if they see an "in violation. That puts them in a very awkward position."

Several people on the board of directors for Economics and Law, according to a list on file at the district administration building, knew about the school.

He never even been to the school," said Philadelphia County Commissioner John Green, who added that he was not sure if he was on the

Philippe, who was listed as a community representative, said he agreed to be on the board and planned to contact the school to complain.

Taylor, a vice president and assistant at the Federal Reserve Bank of Philadelphia, said he had been at a meeting since the school opened and was surprised to hear of problems.

The school has received more than \$330,000 in taxpayer dollars from the Philadelphia district.

Confusion, though, is to be expected at first, said some education officials.

Jeanne Allen, president of the Center for Education Reform in Washington, said the schools should be judged on their educational success, not on their start-up.

"You've got to expect there are going to be some fits and starts," said Barbara Grant, Philadelphia Superintendent David Hornbeck's chief spokeswoman. "Let's give them a chance."

Most education officials support an appeals process for charter applicants, which is likely to increase the number of charter schools in Pennsylvania. It is scheduled to begin next year, with the state board including a parent, a school board member, a certified teacher, a higher education representative, a business representative, and a state board of education member.

Until now, school boards had only say in whether to grant a charter. "Right now, people have to put an enormous effort into the political process trying to get through local school boards," said Joe Nathan, director of the Center for School Change at the University of Minnesota.

As a result, curriculum, programs and operation may suffer, he said.

Gentzel, of the Pennsylvania School Boards Association, said he was concerned that an appeals board could create a "charter mill."

"I'm afraid local school boards won't have much incentive to take this process seriously," he said.

Philadelphia's school district this year is spending \$11.8 million for 13 charters enrolling 2,950 students. The city charters are among 1,129 nationwide serving more than 250,000 students.

The problems at Economics and Law at 525 S. Fourth St. surfaced when the state sent in a team for a routine visit, said Dawn Schaffer, a spokeswoman for the Pennsylvania

Department of Education. In addition to safety, staffing and educational concerns, the team also heard neighbors' complaints about students congregating on nearby South Street.

In response, the district has appointed a team of university educators to visit the school this month and assess it, said Grant, the district spokeswoman. She said it was premature to speculate on whether the school would be allowed to keep its charter.

"What we have to make sure of is that there's a sound educational program there and that the health of the children is being adequately safeguarded," she said.

School officials are trying to fix the fire-code violations so the building can reopen, said Andrea White, a spokeswoman for the Department of Licenses and Inspections.

Grant said she was not sure what would happen if the school did not have the required number of certified teachers.

There was one of about a half-dozen teachers who have quit. She said she had no lights in her classroom for the first four weeks of school and a leaky ceiling. There were three or four student fights each period, and supplies were lacking in several classrooms, she said.

Ciliberti, the school's cofounder, said she resigned from the board after disagreements with the school's leaders and after realizing that a charter could not offer the advantages of a regular high school, such as extracurricular activities and sports.

"Big kids need big things. Running a high school is a very complicated task," she said.

At West Oak Lane, a 548-student elementary charter at Washington Lane and Stenton Avenue, leaders have hired a new principal, solved the problem of frozen sandwiches on Mondays — all it took was a change in the freezer temperature — and are taking steps to satisfy other concerns, such as the lack of homework, said Andrea Thomas-

Reynolds, executive director of the Ogontz Revitalization Corp.

"We have addressed the issue of homework with the new principal, and she has placed that on the agenda as one of the school's priorities," said Thomas-Reynolds, whose agency sponsored the charter — also backed by State Rep. Dwight Evans (D., Phila.) — and gave \$2 million for renovations.

Philadelphia City Councilwoman Jannie L. Blackwell, who heads Council's education committee, said she supported the idea of charter schools.

"They've had to create it all and tough it out," she said.

Council is holding a hearing Dec. 8 to educate the public about charters and discuss their impact.

But Ted Kirsch, president of the Philadelphia Federation of Teachers, an opponent of charter schools, said the problems showed that the city probably moved too fast on a program that only drains crucial money from the regular public schools.

"To take small handfuls of kids out into alternative programs doesn't deal with the basic problems we face," he said.

ATTENTION! PUBLIC NOTICE

You may be eligible for a REIMBURSEMENT PAYMENT if you were a participant in the Transitional Housing Voucher Program, administered by the Tenants' Rental Assistance Corporation (TRAC), between September 1992 and August 1994, and were directly responsible for payment of utilities. If you participated in the program, please call the following numbers prior to November 10, 1998.

(215) 686-9747 TTD: (215) 686-9803
Spanish: (215) 686-9770

Please note: an eligibility confirmation process is required.

City of Philadelphia
Edward G. Rendell, Mayor

"Goodbye"

CoreStates



U.S. Rep. Dwight Evans

Very concerned with improving the quality of education for all children, Rep. Dwight Evans co-sponsored House Resolution 133 to study the issue of restructuring Pennsylvania's 24 urban districts. The bill advocates early childhood education and reduced class size.

West Oak Lane Charter School

A beautiful, new charter school is being built in the Ogontz area. It is the brain child of Democratic U.S. Rep. Dwight Evans, who worked closely with the Ogontz Avenue Revitalization Corporation (OARC) in the development of the school. Residents in the area have shown a tremendous, positive response to this initiative which is to be operated by highly experienced school administrators and professionals. During the first two community meetings, a record number of parents attended and registered their children. The school has enrolled approximately 548 students with many still on the waiting list.

Some of the primary characteristics of the school will be:

- An ambitious, standards-based curriculum, including: reading and language arts; mathematics and science; character and ethics; health and fitness; and practical arts
- Instruction in Spanish, art, and music for all students
- Integrated and hands-on learning
- A caring, committed team of educators backed by an extensive program of professional development
- A longer school year and a longer school day
- Extensive use of computer technology, and a full-day kindergarten
- Extensive opportunities for parent involvement
- Instruction in local history and current local issues

EUGENIO MARIA DE HOSTOS CHARTER SCHOOL

Hostos Charter School will open in September with approximately 120 students from grades 4-6. The school plans to go to the 8th grade. Mr. Hector Bonilla, the principal, spoke enthusiastically about the school's potential. He explained that Eugenio Maria de Hostos was a Puerto Rican revolutionary and educator who advocated social justice.

Hostos is the bi-lingual charter school in Philadelphia offering instruction in both Spanish and English. It has a flexible program that keys the level of instruction to the language ability level of the student in the beginning, and builds proficiency so that the students will progress to higher levels.

from the prospectus

The school will provide a rigorous curriculum that will fuse technology with the arts and project-based instruction. We believe that the school should be a place that is characterized by respect, critical thinking, democratic classrooms, and the vigorous challenges that are essential to maximize every student's potential. In addition, at the core of Hostos Charter School is the unity and empower-

ment of the community, parents, students, teachers, and staff of the school.

The core values of the school include: **citizenship, cooperation, fairness, honesty, integrity kindness, pursuit of excellence, respect, and responsibility.**

The Hostos Charter School empowers students to analyze critically controversial society and community issues and discern that learning can be derived from their practical resolutions; to utilize their talents to engage in organized freedom in order to share in decision making; to take advantage of their inquisitive nature to use a wide variety of means - derived from science and technology- to solve problems and propose different solutions; and to utilize their natural disposition to interact in a bi-lingual and bi-cultural environment.

The Hostos Charter School empowers teachers and students to engage jointly in critical thinking and face together the process of problem solving as members of their community.

Dec 95

Challenge meets WOL Charter

Principals, books, lunch issues settled

By Arlene Edmonds

When the West Oak Lane Charter School reopened its state-of-the-art doors Monday morning after the winter recess break, it did so on a high note.

For the five-month-old quasi public school which opened its doors September, the road to 1999 was met with challenges and promise. The school is located on Stenton Avenue and Washington Lane in the heart of Northwest Philadelphia.

The academic year has been marked by transition of principals, late arriving supplies, computers and textbooks, hot lunch dilemmas, and a slow start for the parent's organizations. Yet, considering just a year ago the publicly funded charter school was a distant mirage and its location was an vacant supermarket, the West

Oak Lane Charter School has made progress.

"Things are going really well," insisted John Unger, director of economic development for the Ogontz Avenue Revitalization Corporation (OARC). The non-profit community organization has the charter for the elementary school through the School District of Philadelphia.

"The textbooks are all in and the computers just arrived. We had a problem with the annex to the main building because the roof was unsafe, but the landlord has taken care of that. In November, we were able to open up the gymnasium and the multi purpose room. The annex is now being set up for the information center," said Unger.

The school's new principal is Dr. Margaret Briggs Kenney, who spent the last six years at the Paul Dunbar School in North Philadelphia.

Kenney was officially to be on board Jan. 4. In recent weeks she has already been attending all the

Continued on page 12

Continued from page 1

board of director meetings for the charter school. The school's board consists of community volunteers and parents. Kenney has also had some "hands on involvement" in the running of the school for the past several weeks, according to Unger.

As Kenney comes on board this month, she will be bringing along her own administrative team. The director of operations, Todd Reynolds, already began his tenure at the school on Dec. 3. He is responsible for all non-instructional issues at the school ranging from the universal lunch program to ordering of supplies.

"Since he's been in place things have really been working out. He has reduced a lot of the initial chaos we had regarding the lunches and ordering of the supplies. The school

now has all the supplies in order," said Unger.

In addition, Donna Parker joined the administrative team last Monday, as the assistant principal. She brings with her administrative experience from schools in the Fox Chase area of the city. Dr. Shirley Grice of West Chester University will also complete the team as director of technology for the school which emphasizes the sciences and computers in its program of study.

Since mid-November Rita Spelkoman has served as interim principal of the West Oak Lane Charter School. Both Spelkoman, a consultant and former principal at the Cooke-Wissahickon School, and Kenney have been in close contact during the past several weeks. "Everything has really darned down making the transition remarkably smooth and we expect things to only get better."

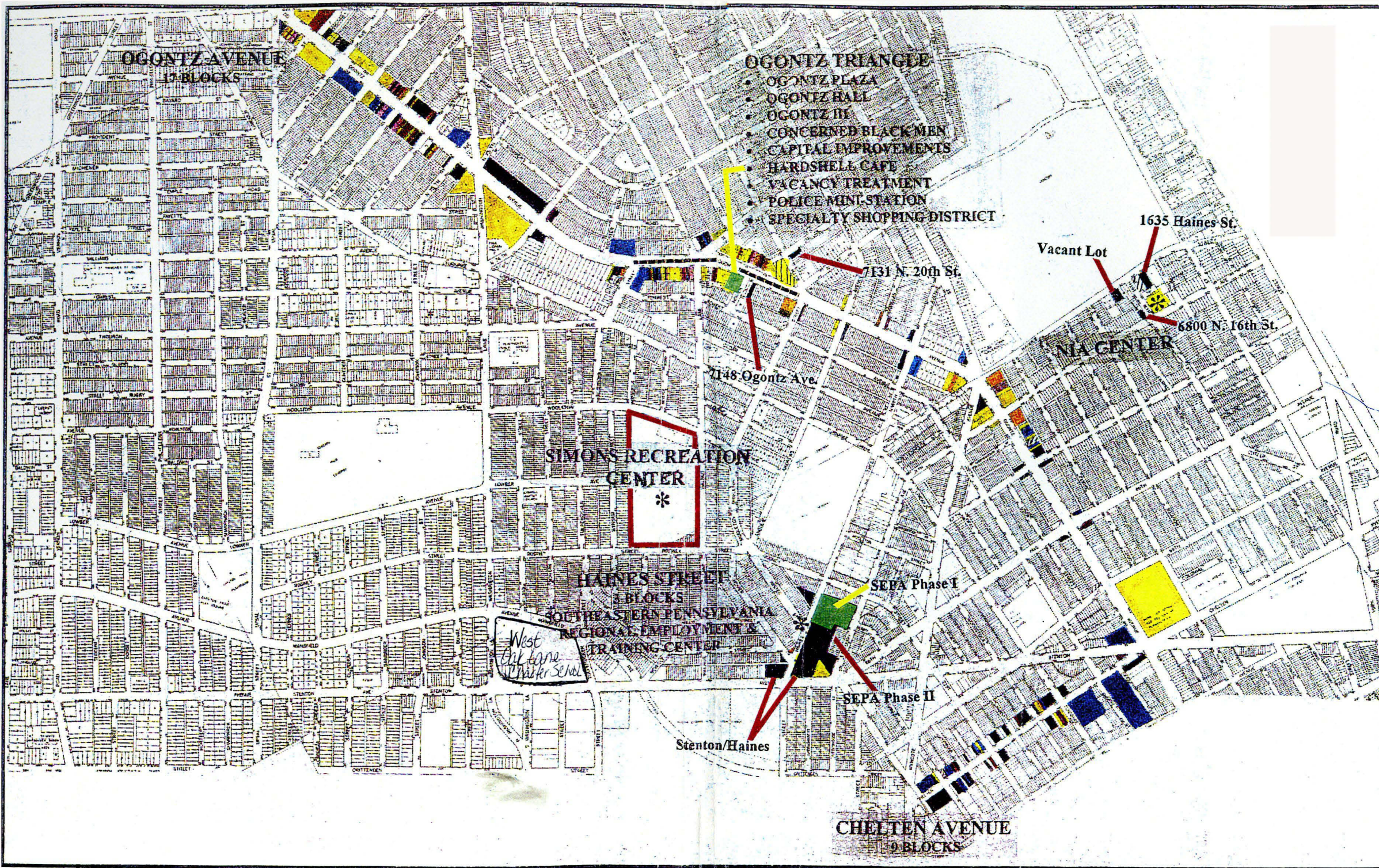
The parents also participated in sprucing up the school for the holidays. On display are both Christmas and Kwanzaa decorations. Recently the string ensemble and the jazz band from the Philadelphia High School for Girls, Broad Street and Olney Avenue, were scheduled to present their holiday program of Christmas carols and seasonal songs. The student body also held a holiday skating party during the winter recess.

The board is already gearing up for its first Public Works Session of the new year. This will be held on Monday, Jan. 11, at 6 p.m. in the school cafeteria. At this meeting the agenda for the larger community meeting will be set as well as issues for the board to vote on. This meeting is open to the general public.

The larger West Oak Lane Charter School board meeting will be held on Monday, Jan. 19. This will also begin at 6 p.m. in the school cafeteria and, again, is open to the general public.

"We are just pleased that

we have made a lot of progress. Now that we have the administrative team involved and they will be fully involved on a day to day basis next year the OARC staff can now step back. We have just been involved in a lot of the transition and will continue to be involved, but just to a lesser degree. We look forward to 1999," said Unger.



OGONTZ AVENUE
17 BLOCKS

OGONTZ TRIANGLE

- OGONTZ PLAZA
- OGONTZ HALL
- OGONTZ III
- CONCERNED BLACK MEN
- CAPITAL IMPROVEMENTS
- HARDSHELL CAFE
- VACANCY TREATMENT
- POLICE MINI-STATION
- SPECIALTY SHOPPING DISTRICT

1635 Haines St.
Vacant Lot

7131 N. 20th St.

6800 N. 16th St.

NIA CENTER

7148 Ogontz Ave.

SIMONS RECREATION
CENTER *

HAINES STREET

3 BLOCKS

SOUTHEASTERN PENNSYLVANIA
REGIONAL EMPLOYMENT &
TRAINING CENTER

West
Oak Lane
Prader School

SEPA Phase I

SEPA Phase II

Stenton/Haines

CHELTEM AVENUE
9 BLOCKS