Executive Summary

Current research indicates that without intervention, children from low-income communities lose an average of 2 months grade-equivalent skills in math and reading each summer. The transition from elementary to middle school poses particularly difficult challenges for children who are already struggling academically and socially. BELL's evidence-based, award-winning BELL Summer program provides a critical opportunity for scholars to avoid summer learning loss, experience success, gain self-confidence, and enter the school year more ready to succeed in core subjects. With a grant of $200,000, to be matched by BELL, we propose to provide a rigorous and stimulating six week summer program for 220 rising 6th graders at Lakeview Middle School and Tanglewood Middle School.
Strategic Alignment

The BELL (Building Educated Leaders for Life) model is built to combat summer learning loss, which contributes up to 2/3 of the academic achievement gap between children from low-income backgrounds and their higher-income peers. Research shows that each year children lose valuable math and literacy skills over the summer; this cumulative summer learning loss leads to scholars falling farther behind each year and contributes to chronic academic under-performance and risk of dropping out of school. While all children are susceptible to summer learning loss, children from under-resourced, minority communities are at the greatest risk and, on average, will lose up to 2 months of grade-equivalent skills in literacy and math each summer.

In particular, the transitions from elementary to middle school and from middle to high school are critical turning points in the social and academic development of an adolescent. If the scholar is already struggling in school, the transition may cause irreparable emotional and academic setbacks. In order to set these scholars up for success as they enter into middle school, BELL will target our summer program to reach rising 6th graders from low-income communities who struggle academically, making them most vulnerable to summer learning loss. We propose to partner with Lakeview Middle and Tanglewood Middle schools based on their high concentration of student poverty and low test performance in English/Language Arts and Math. According to the schools, 96% of Lakeview students and 91% of Tanglewood students qualify for the Free and Reduced Lunch program. Additionally, 52.6% of Lakeview students and 49.4% of Tanglewood students did not meet English/Language Arts proficiency standards on the South Carolina Palmetto Assessment of State Standards, and 55.5% at Lakeview and 45.5% at Tanglewood did not meet standards of proficiency in Math. In addition to using this data to define our target population, we will work closely with the district, the principals, and the teachers to identify rising 6th graders who would benefit most from the program. Selection of the students will be in collaboration with administration and staff from these schools and based on the Early Warning and Response System indicators.

In summer 2015 we propose to serve approximately 220 academically struggling scholars entering 6th grade at Lakeview and Tanglewood Middle schools and provide parent engagement support and training for their families. The program will operate 6.5 hours a day, 5 days a week, for 6 weeks during the summer. BELL scholars begin their day with a nutritious breakfast and “community time,” followed by intensive morning literacy and math instruction. Each classroom operates with a 1:10 teacher-to-student ratio, creating the ideal environment for individualized attention, differentiated instruction, and hands-on learning. We hire only certified teachers who are assisted by qualified teaching assistants in each classroom. Certified teachers selected to serve in the BELL program must have a passion for working with under-performing students and a proven record of academic progress with students who are struggling in ELA and math.

After academic blocks, scholars enjoy a healthy lunch and engage in at least 30 minutes of physical activity. In the afternoons, they participate in engaging enrichment modules such as leadership and character development, fitness, financial literacy, nutritional cooking classes, STEM, art, and music. Scholars also participate in exciting educational field trips in order to encourage attendance and complement classroom learning. In addition, parents and guardians are consistently encouraged to participate in their scholar's development throughout the summer and
are invited to parent engagement events where scholars showcase their work, talents, and accomplishments. Core values such as respect, courage, collaboration and excellence are integrated throughout the program, and scholars enjoy weekly themes focused on areas such as College Week and Community Service Week. To keep middle school students engaged and attending each week, incentives are available through the Friday Scholar Dollar Store. This strategy, along with the relationships developed with BELL staff and the high interest in enrichment activities and weekly field trips, keeps middle school scholars coming back each day.

BELL has a proven history of success with children who fit the risk criteria identified in the Early Warning and Response System - especially those struggling to master fundamental math and literacy concepts. We operate academic summer programs for thousands of scholars in under-resourced, urban communities across the country each year. Rather than losing the typical 2 months of grade-equivalent skills, under-performing scholars in BELL Summer, on average, avoid summer learning loss and gain 1 month or more of grade-equivalent math and reading skills. Scholars also demonstrate improvements in self-confidence and attitudes toward learning. Simultaneously, parents become more engaged with their child's education, and teachers benefit from professional development through BELL's rigorous training and implementation program.

This will be BELL's first time offering our award-winning BELL Summer model in the White Horse Community. Based on our success with similar populations in other cities and on our conversations with representatives from United Way of Greenville County, BOOST, and local funders, BELL sees an enormous opportunity to improve math and ELA achievement for middle school scholars in the White Horse Community. Our program fills a service gap need for a data-driven, academically-focused summer learning program for middle school children. Although BELL currently does not serve scholars in South Carolina, the program has had a profound impact in North Carolina, including Charlotte-Mecklenburg Schools, Winston-Salem/Forsyth County Schools, and New Hanover Schools (DC Virgo Preparatory) serving nearly 2,500 scholars last summer across the state. In each of these communities, BELL has made an intentional effort to engage and partner with the community to provide the strongest opportunities for scholars to expand their learning experiences. BELL has partnered with the public library systems, local museums like Discovery Place, the Aviation Museum, Greensboro Science Center; and local theaters and arts venues like Children’s Theatre of Charlotte and CPCC Summer Theatre to provide enrichment our children have never been exposed to before. Local volunteers from the faith community have provided one-on-one assistance and tutoring for students, assisted with family engagement opportunities and served as chaperones on field trips. Volunteers have also been recruited through United Way of Central Carolinas’ Volunteer Center and through SHARE CHARLOTTE, a local non-profit committed to engaging the community to create a stronger city. Volunteers and staff also served as tremendous mentors to our scholars.

The key factors to success in community engagement efforts included relationship building, strong communication, and mutually beneficial and reinforcing activities. Our goal is to create win-win opportunities for our community partners in our engagement efforts. Some barriers we have encountered in the past include the capacity to handle volunteer volume (need for training, assimilation, recognition) and limited staffing to ensure timely communication.

Milestone Timeline
Evaluation Experience and Evidence

1. Level of Evidence

The BELL Summer model has a strong level of evidence for its impact at the elementary school level. In 2005, the Urban Institute conducted a two year random assignment study to evaluate the efficacy of the BELL Summer program for elementary school age children. Children who applied to participate in BELL summer programs in New York and Boston were randomly chosen to be in either a treatment group or a comparison group. Independent researchers collected student reading tests and student and teacher surveys. The study found that children in the BELL Summer treatment group gained about a month's worth of reading skills more than their counterparts in the comparison group who did not participate in the program. The study also found evidence of positive impacts on the degree to which parents encouraged their children to read. Please see the attached documentation for the full Urban Institute Report.

In 2011, BELL received a grant from the Social Innovation Fund and the Edna McConnell Clark Foundation to expand its impact and generate additional evidence of impact at the middle school level. To that end, researchers from MDRC conducted a second random assignment study of the BELL Summer program. This new study was designed to measure the program's impact on the reading and math skills of 8th grade scholars. Despite its rigorous research design, some limitations of the evaluation design and its execution make its findings not definitive or generalizable. The study originally aimed to recruit 3,000 study participants but ended up with roughly 1,300 participants. The study was also based on school districts implementing the program for the first time. The findings in the report may not be representative of the effect of BELL’s middle school program in school districts where the model has been implemented for several years and where implementation may be stronger. Because of these limitations, the results are expected to be released as exploratory sometime in February 2015. In the meantime, BELL is already using the data and results to improve our middle school program, which is an area that historically has been hard to measure and track progress. A Middle School Advisory Council has been established to look at areas of improvement.

BELL also has a rigorous internal evaluation system which is used each program cycle to measure scholar progress. We employ the Renaissance STAR Assessments on a pre and post-program basis to measure grade-equivalent gains in math and reading. According to our national STAR Assessment results, last summer's BELL middle school scholars who pre-tested as underperforming in reading made average grade-equivalent gains of 2.7 months and those underperforming in math made average grade-equivalent gains of 4.7 months.

2. Implementation Fidelity

BELL uses a backwards planning model to purposefully align all of our quality assurance standards with our mission and core values. These standards are then correlated to resources and provided to staff through pre-program training sessions and BELL's online library to ensure that they have all information and tools necessary to successfully implement a quality summer program faithful to the BELL model. Once programs have launched, BELL National Program Design staff visit at least 50% of sites in each region using a customized app from TeachPoint to
collect and analyze the site data against our Quality Assurance standards. All sites are expected
to maintain high scholar attendance, consistent staff to scholar ratios, appropriate lesson plans,
and adherence to BELL's core values.

QA visits are composed of site and classroom observations as well as pre and post observations
discussions with site leadership. Both the formal data collected from TeachPoint as well as the
anecdotal data gathered from staff discussions are used to inform and prioritize future initiatives
in the cycle of continuous improvement BELL utilizes to ensure quality summer programs year
after year. Attached to this application is a sample quality assurance rubric used for our summer
2014 program cycle; please note that some QA indicators are currently being revised based on
feedback and data though they will remain mostly the same for summer 2015.

3. Capacity and Infrastructure

BELL is nationally recognized for its rigorous approach to program evaluation. Its evaluation
activities are guided, advised, and endorsed by an external, interdisciplinary group, BELL's
national Evaluation Advisory Board. The responsibility of the Evaluation Advisory Board is to
oversee the application of principles and standards established in the evaluation and assessment
field. For a full list of members see: http://www.experiencebell.org/our-results/evaluation-
advisory-board. BELL is currently in the process of recruiting additional members for its
Evaluation Advisory Board.

BELL also employs a full time Director of Evaluation who is responsible for leading and
coordinating program evaluation and quality assessment efforts across the organization. A full-
time Learning and Assessment Systems Specialist reports to the Director and assists with data
collection and quality assurance processes. The Director of Evaluation works closely with the
Vice President of Program, the Director of Program Design, and the Advisory Board to structure
evaluation activities, monitor curriculum implementation, and review results from data collected
at the beginning, middle, and end of every program through the following:

- At the beginning and end of BELL Summer, scholars undergo a Renaissance Learning, STAR
Enterprise Assessment in literacy and/or math to identify their unique academic needs and to
quantify grade-equivalent gains made in math and reading. Using STAR, a computer-adaptive
assessment used by districts across the country, BELL is able to map scholars' learning to local
and/or national Common Core standards, target students who are most at risk, identify areas for
curriculum development or teacher training, and develop individual instruction plans to ensure
scholars are learning during the important summer months.

- Mid-program quizzes monitor student progress and help ensure that each scholar meets key
benchmarks toward reaching proficiency. At this time additional areas for support are identified
and new action plans are developed to help scholars who are struggling to make progress.

- Parent surveys are administered at the end of the program and measure parent perceptions
around scholar attitudes toward learning, personal aspirations, leadership abilities, and
improvements in reading and math. Surveys also ask parents about their personal experience
with the BELL program and staff and their level of engagement with their child's education as a
result of the program.

- Scholar surveys are administered at both the beginning and end of the program to scholars in grades 4th and higher and measure growth during the program in key youth development domains such as academic success and engagement, positive core values, leadership abilities, and self-confidence and self-efficacy. In addition, post-program scholar surveys measure scholar satisfaction and engagement in the summer program and collect important qualitative responses around a scholar’s favorite experience from the summer program.

- Teacher surveys are administered at the end of the program and measure perceptions about program quality, scholars' social and academic progress, professional development, and satisfaction with their BELL teaching experience.

At the end of each summer program, assessment data and survey responses are compiled and evaluated by the Evaluation team. Prior to analysis, all assessment, program quality, survey, and program monitoring data undergoes a thorough and rigorous review to ensure the data is accurate, high quality, and representative of the full BELL summer experience across all states, regions, partnerships, and sites. Once the reviewed data has undergone a rigorous statistical analysis, BELL’s Director of Communications then works with regional Executive Directors and Development Officers to create a written outcomes report for each program and region. The reports are then shared with the Board, community and school partners, funders, and local Leadership Councils through emails and meetings. All data is also shared and discussed internally with all relevant BELL departments and leaders to ensure BELL’s cycle of continuous improvement is driving necessary program improvements from year to year. As a reference, the national 2014 Summer BELL Impact Report for is attached to this application.

4. Experience

As illustrated in the sections above, BELL has extensive experience engaging in both external and internal evaluation efforts. Based on findings from internal assessments and evaluations, combined with the preliminary findings of the MDRC study, BELL has made significant enhancements to its summer learning model in the past two years. These programmatic enhancements are in line with best practices recommended by IES and are a positive step towards strengthening BELL’s middle school model in particular.

• Training:
  o BELL has re-engineered its training and now uses a “train the trainer” model that is less centralized and more regionally driven by school and district partners.
  o BELL has continued to improve and add new content to BELL University, its internal online e-learning platform, and has developed a digital library in BELL University which stores important resources for program leaders.
• Curriculum: BELL is now using ELA and math curricula published by Pearson – Reader’s Journey and Math Navigator. Both curricula are fully aligned to the Common Core State Standards (CCSS). The ELA curriculum has an increased focus on non-fiction (informational) texts and the math curriculum has a heavy focus on algebraic reasoning.
• Distribution: New curriculum materials are fully consumable, which means that students can keep workbooks and other materials after they complete the program. This has eliminated the
need to transport and store materials in a central warehouse. Instead, curriculum materials are shipped directly from Pearson, resulting in the more timely arrival of key material resources at the start of the summer.

- **Data-Driven Instruction**: BELL is using new computer-adaptive assessments to measure student achievement at the beginning and end of the program and further bolster teaching effectiveness. New formative assessments (STAR Enterprise Assessments) are more rigorous than the previously used assessment and provide immediate data on student performance.

- **Teacher Support**: The responsibilities of the lead teacher have evolved into a full-time “instructional coach”. Instructional coaches are expected to observe classrooms each week, to provide advice to teachers on how to improve instruction and engage students, to give teachers feedback on their weekly lesson plans, and more generally to support teachers in implementing the new curricula.

- **Quality Assurance Monitoring**: BELL has implemented a new quality assurance tool that is more focused on measuring program and classroom instructional quality and rigor and less focused on measuring program compliance.

- **Middle School Advisory Board**: With the help of its steadfast funders, BELL has created a Middle School Advisory Board whose membership includes several middle school and out-of-school time experts, who will advise BELL on best practices for teaching middle school students.

Logic Model or Theory of Change upload
/document/download/filename/1420834542_12237_BELLLogicModel-TheoryofChange.docx/
Evidence Level Documentation upload
/document/download/filename/1420834542_12238_UrbanInstituteEvaluationofBELLSummer.pdf/
Other -- Evaluation upload
Organizational Capacity and Leadership

1. Background and Expertise

BELL’s mission is to transform the academic achievements, self-confidence, and life trajectories of children living in under-resourced, urban communities, and our vision is for all children to excel. Last year we ran successful summer programs for thousands of children in under-resourced communities in: California, Maryland, Massachusetts, New Jersey, New York, North Carolina, and Ohio.

In the early 1990's, a group of Black and Latino students at Harvard Law School began a community service project at a local public school. Between pick-up basketball games, the volunteers realized many of the children could not read, write, or perform math operations at grade-level proficiency. Inspired by the opportunity to transform children's lives, the group, led by Earl Martin Phalen and Andrew L. Carter, began working with parents, teachers, and experts at Harvard University to create an educational after school program that integrated best practices in academic tutoring, enrichment, and evaluation.

"BELL" was incorporated in 1992 and named in honor of Professor Derrick A. Bell, Jr., Harvard Law’s first Black tenured professor. With guidance and support from BELL board chair emeritus Professor Charles J. Ogletree and former board member Dr. Robert S. Peterkin, the BELL After School program reached 20 students in its first year of operation. We have since developed our award-winning BELL Summer learning model and grown to serve 12,000 children annually in communities across the country.

BELL programs are specifically targeted to serve academically struggling children from low-income communities. As mentioned in the evidence section above, we are one of very few out-of-school time providers with strong, independent evidence of program impact. In addition to the random-assignment studies which point to our effectiveness with the target population, our internal assessment data consistently points to academic impact and informs program development and improvement each year. Last year in North Carolina alone, we served 2,485 struggling scholars in grades K-8 over the summer. On average, underperforming scholars made grade-equivalent gains of 2 months in reading and 3 months in math. In addition, 92% of parents reported becoming more involved in their child's education as a result of BELL Summer, and 96% of BELL teachers reported seeing an increase in self-confidence in the scholars.

2. Partnerships

The strong relationship BELL has with our partnering school districts is a critical element in the success of our program. By hiring certified teachers and administrators from the districts we serve, we are seeing significant academic gains. These educators are passionate about this work and committed to the BELL model. In many cases, bilingual staff members are hired in programs with a high ELL population to serve both the scholars and their families.

BELL is experiencing success thanks to non-profits like Charlotte Speech and Hearing Center (CSHC). This summer, CSHC provided screenings to detect speech and language development
delays and offered inclusion services during the program. Non-profits like Communities In Schools have been involved in assisting with recruiting scholars for our program and provided additional staffing in some communities, and BELL has partnered with A Child’s Place, a non-profit focused on serving homeless children and offering academic support, to lead their summer program in Charlotte. These are just a few examples of the strong partnerships and collaborations BELL has coordinated in North Carolina.

We have extensive experience with strong district and school partnerships, community engagement, and collective impact in the cities which we serve. For example, BELL was selected as the out-of-school time partner in Project LIFT, a five-year, multi-million dollar project in the West Corridor of Charlotte to increase student academic performance and graduation rates. Project LIFT is an innovative public-private partnership which relies on exceptional and committed staff and collective, coordinated efforts from community partners to improve overall outcomes for schools and scholars.

BELL National also has a partnership with the YMCA at the National level to coordinate out of school time programs in communities where both organizations aren’t already established. BELL has provided the quality standards, staff training and roadmap for quality academic programs in the Y sites. In Charlotte, where BELL and the YMCA (K-2 Y Readers) are both established with strong academic out of school time programs, the two organizations collaborate to support targeted levels of students (i.e. – in schools where Y Readers programs are established for K-2 students, BELL serves 4th and 5th grade and potentially middle school students).

BELL has also been involved in Collective Impact efforts in communities in North Carolina, such as Charlotte, where a third grade reading initiative is underway involving numerous non-profit organizations, higher education institutions, the school district, and major funders.

3. Leader and Staff Qualifications

Staff members/positions critical to successful program implementation include: Executive Director for the Carolinas, Director of Field Operations, 2 Program Directors, 2 Program Assistants, 2 Instructional Coaches, 20 Academic Teachers, 20 Enrichment Teachers, and 20 Teaching Assistants. Additionally, when working in schools with high English Language Learner populations, such as Lakeview Middle School, we aim to recruit bilingual staff to help with parent and community engagement and we provide ELL training for other staff members when possible. The following outlines the key staff members and job descriptions for implementing BELL Summer 2015 in Greenville:

Executive Director for the Carolinas - Jerri Haigler, joined BELL in 2014 and leads BELL’s programs and partnerships in North and South Carolina. She brings to BELL a wide range of experience and passion in public relations, community development, and education. Previously, she served as the Vice President of Education, Engagement & Communications at the United Way of Central Carolinas (UWCC), where she was instrumental in launching and implementing the Collective Impact effort to increase the graduation rate of at-risk students being served by United Way funded children and youth agencies. She has also served as Executive Director for Parent University and Family & Community Services for Charlotte-Mecklenburg Schools,
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among other leadership positions in Charlotte. Along with BELL’s Senior Executive Management Team at the national level, Mrs. Haigler holds ultimate responsibility for staff management, program quality, and financial health of BELL in the Carolinas. She would spend approximately 40% of her time focused on the programs funded by this grant.

Regional Director of Program Operations - Sherrinne Reece has worked with BELL in multiple geographic regions since 2005 and has directly contributed to the academic and personal growth of thousands of BELL scholars. She managed the launching and faithful implementation of BELL programs in New York, Charlotte, and Baltimore; she has extensive experience growth and replication of programs. She thoroughly understands and guides the processes leading up to BELL Summer, including staff recruitment, hiring, and training, as well as scholar enrollment and administering effective evaluations. Sherrinne is responsible for ensuring high quality programs and staff performance for the duration of the program. She would spend approximately 40% of her time focused on the programs funded by this grant.

Director of Evaluation - Bryan Hall serves as BELL’s national Director of Evaluation. He has worked at BELL for five years and brings more than ten years’ experience leading and managing program evaluation and research initiatives in the public health, K-12 education, and non-profit sectors. He designs and implements internal program evaluations and oversees the collection and use of ongoing assessment data for purposes of continuously improving BELL programs and operations, demonstrating program effectiveness, meeting accountability requirements, and building the field. This position manages the assessment process, reports outcomes externally, and produces internal lessons learned reports for management use. He works with a broad range of internal customers, primarily BELL operating regions, and functional managers, and manages external evaluators and the Evaluation Advisory Board. His position supports BELL’s mission by leading a high-quality, rigorous process for using data to continuously improve our work with scholars across the country. The Director of Evaluation will commit approximately 10% of his time to the evaluation and assessment component of this grant project.

Program Managers (to be hired) - One Program Manager will be hired for each site for the duration of the summer program. Typically, these positions are filled by 11 month administrators in the district. Key responsibilities include: serve as an ambassador of BELL to parents, school administration and the community; manage training, professional development, and performance evaluation for all teaching staff; guarantee proper ratio of staff to scholars on site at all times, ensure the safety and well-being of all scholars, engage parents and the school’s surrounding community by way of parent events; community service projects and other effective methods. Additionally, the Program Manager has oversight of all day to day operations including supervision of instructional staff, ordering and maintaining curricula and other supplies, intervening in cases of severe scholar behavior issues, ensuring retention and regular attendance of enrolled scholars as well as creating and implementing innovative ways to keep middle school students engaged in the program, and managing program budget to ensure efficient use of funds. The Program Manager must also ensure proper administration and collection of pre and post STAR assessments and teacher and parent surveys.

Program Assistants (to be hired) - One Program Assistant will be hired for each summer school site. The Program Assistant assists the site leadership team in administrative functions on site to
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ensure overall program excellence. Core responsibilities include: communicating confidential information appropriately and in a timely manner between BELL site leadership team, school, and parents; assisting site leadership team in setting up and closing site daily; collecting and submitting accurate scholar attendance records daily; making calls to parents of absent scholars daily and recording outcomes; supervision of daily recording of staff time sheets; supporting implementation of parent events, guest speakers, and community service projects; assisting in distributing and collecting supplies for site staff and scholars; supporting site leadership team in ensuring orderly scholar conduct, transition times, meal supervision, arrival and dismissal of scholars; supporting staff on all projects and administrative tasks as needed. In sites with high ELL populations, it’s important that this position is filled by a bilingual staff member.

Instructional Coaches (to be hired) - One Instructional Coach will be hired for each school site. BELL hires certified teachers and administrators with leadership experience to serve as instructional coaches in our summer programs. Coaches provide individualized support and feedback to classroom teachers and teaching assistants to improve overall instruction in English/Language Arts and math and student engagement and achievement. The Instructional Coach has three primary responsibilities: 1) Pre-service professional development and ongoing coaching for teachers and teaching assistants; 2) Providing leadership on the implementation of instruction and meeting the academic needs of scholars; 3) Ongoing analyzing of assessment data to inform instruction and instructional groupings.

Academic Teachers - Each academic course cluster of 20 scholars will have one Academic Teacher and one Teaching Assistant. Academic teachers must be certified teachers with relevant teaching experience for the program. Core responsibilities include: Implementing literacy and/or math curricula and activities to meet academic standards; utilizing formal assessment data to refine and adapt curriculum lessons and inform instructional practices; developing daily engaging lesson plans aligned to specific learning objectives; delivering relevant, engaging, and rigorous lessons utilizing a variety of instructional methods; maintaining an organized and efficient classroom; adhering to all BELL and district professional expectations and compliance issues; creating a positive, achievement-oriented, organized and engaging learning environment; motivating and holding scholars to high academic and behavioral expectations; providing consistent rewards and/or consequences for scholar behavior grounded in positive discipline; empowering scholars to make positive choices and serving as a role model; being accountable for meeting scholars’ individual academic and instructional needs; implementing collaborative and co-teaching instructional strategies with BELL Teaching Assistants; communicating effectively with scholars, families, BELL staff, and host school staff; compliance with all BELL and/or partner professional development requirements.

Enrichment Teachers (to be hired) - Afternoon enrichment courses will be lead by Enrichment Teachers and Teaching Assistants. Enrichment teachers must have at least two years experience in teaching the enrichment subject (i.e. arts, STEM, dance, nutrition). Core responsibilities include: developing and implementing appropriate enrichment classes appropriate for rising 6th graders; preparing classrooms for daily activities and collaborating with academic teachers and teacher’s assistants to ensure that objectives are reached; maintaining accurate classroom records and maintaining an organized and efficient classroom; creating a positive, achievement-oriented, organized and engaging learning environment; empowering scholars to make positive choices
and serving as a role model; being accountable for meeting scholars’ individual instructional needs; ensuring enrichment goals are met for each scholar; creating and directing project based learning; mentoring and supporting the professional development of the Teaching Assistants; Assisting with supervising scholars during guest speaker engagements, field trips, lunch and recess

Teaching Assistants (to be hired) - Each classroom will have a qualified teaching assistant to support academic and enrichment teachers. Core responsibilities include: implementing collaborative teaching strategies with academic and/or enrichment teachers to a cluster of scholars; supporting the development and delivery of relevant, engaging, and rigorous lessons; serving as a role model and resource for an assigned group of scholars; working with teachers to identify scholar needs and develop instructional plans and practices to best support scholars academic and social development; supporting classroom and behavior management consistently to develop a safe and productive learning environment; maintaining attendance and supporting classroom procedures/functions; supervising scholars during classroom transitions as well as during lunch, snack, recess, etc.; assisting in field trips and special events

4. Experience with Program Growth and Replication

BELL is a national organization with roots in Boston and years of experience successfully replicating our summer program in communities across the country. We have a turnkey operation for essential program logistics including scholar enrollment, staff recruitment, training, curriculum distribution, program execution, and outcomes measurement. One obstacle to program growth and replication is limited revenue sources. Despite a growing interest in expanding learning time, public funding for such efforts remains limited and must be supplemented by substantial private contributions. In addition to limited federal funds, states, school districts, and schools in under-sourced communities struggle to find funds to sustain high-quality summer and after school programs. Limited funding as well as limited sample sizes are also a challenge for increasing evidence due to the expensive nature of rigorous studies and evaluations.

5. Experience with Federal Grants

BELL’s finance staff includes a Controller and a Finance and Compliance Manager, both with extensive experience with federal funds. Qualifications are as follow:

Controller – Master of Science in Accountancy and Certified Public Accountant. Responsible for the oversight of compliance with grant and contract regulations, particularly for federal funds. The Controller has extensive experience auditing non-profits under OMB Circular A-133, and has extensive experience working directly for non-profits that receive federal funds and are required to undergo an A-133 audit.

Finance and Compliance Manager – Responsible for grant / contract management, compliance, billing, budget vs. actual analysis. The Finance and Compliance Manager has extensive experience with all aspects of grant / contract management and compliance and had primary
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responsibility for successfully managing a multi-year, $10 million federal grant awarded to the organization.

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Letter of Commitment from Executive Director and Board Chair upload
/doc/document/download/filename/1420834542_12241_BELLLetterofCommitment.pdf/

Optional -- Letters of Support
Optional -- Other upload
/doc/document/download/filename/1420834542_12245_Summer2014QARubric.xlsx/
Financial Soundness

1. Funding Diversity and Sustainability

Our annual operating budget for the Carolinas region in Fiscal Year 2015 projects $4,188,414 in expenses. We anticipate receiving $2,577,993 from contracts and fees for services and the remaining $1,610,421 from philanthropy. Central to BELL’s growth and sustainability is our combined public-private revenue model and our national-regional fundraising strategy. BELL revenue sources include a combination of Title I funds, school and district contributions, and national and local philanthropy. The regional Carolinas office, responsible for the implementation of this project, is funded through a combination of contributions from our national office; our district, school, and community partnerships; local foundation and corporate grants; and individual donors.

2. Match Capacity

In order to raise the necessary cash match to fund our work with Lakeview and Tanglewood scholars, BELL will combine national resources with an aggressive local fundraising strategy. In addition to national fundraising staff and capacity, BELL employs a full-time Development Officer focused on fundraising for all initiatives in the Southeast. Together, the regional Executive Director and Development Officer are responsible for developing and executing a fundraising plan for this project. At this time we have had preliminary discussions with a few prospective funders including the Hollingsworth Funds, The Graham Foundation, and Duke Energy Foundation. We will continue introductory meetings in the next few weeks and initiate full proposals and solicitations in February and March. Outlined in the attached Year 1 budget is a tentative list of funders with intended ask amounts. We will be adding to and revising this list in the next few weeks based on feedback gained from meetings.

3. Capacity and Infrastructure

BELL utilizes a reputable, well-known accounting software program for preparing Generally Accepted Accounting Principal (GAAP) basis financial statements. Within the accounting program, BELL accounts for funds by net asset classification to ensure that funds restricted as to time and/or purpose are accounted for as Temporarily Restricted until the time and/or purpose restriction is met. BELL also utilizes a cost center tracking function within the accounting software to successfully track revenues and expenses for all of BELL’s various programs. Additionally, BELL utilizes a reputable, well-known Customer Resource Management software to manage and organize minute detail regarding funding sources. The accounting and customer resource management systems are reconciled monthly by BELL’s finance and development teams.

4. Budget Narrative and Rationale

As outlined in the attached itemized budget, funds from this grant will be used toward staff compensation for: Program Managers, Instructional Coaches, Program Assistants, Academic
Teachers, Enrichment Teachers, Assistant Teachers, Administrative Staff. Grant funds will also be used in part for books, supplies, curriculum, technology, transportation, enrollment, and assessment and evaluation costs. Any costs not allowable under federal funding requirements will be paid for by BELL.

Click here to download the UWGC SIF Subgrantee Budget Template

Year 1 Budget upload
/doc/document/download/filename/1420837237_12247_UWGCSIFSubgranteeBudgetBELL.xlsx/