

**ORLEANS PARISH SCHOOL BOARD**

# CHARTER SCHOOL APPLICATION RECOMMENDATION REPORT 2017

*National Association of Charter School Authorizers*

**November 10, 2017**

*New Charter School Application for*

**BENJAMIN FRANKLIN ELEMENTARY MATHEMATICS AND SCIENCE  
SCHOOL**

*Submitted by*

**LEGACY OF EXCELLENCE**

*Evaluation Team*

**TEAM LEAD: SONIA C. PARK**

**EVALUATORS: DR. IRIS PALAZESI**

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## INTRODUCTION

Across New Orleans, more than 90 percent of public school students currently attend charter schools. These schools have led to a dramatic increase in the number of students meeting academic proficiency standards and the performance gap between students in Orleans Parish and Louisiana as a whole has dramatically decreased over the last 12 years.

Despite these gains, additional progress is needed. Students deserve high quality schools where their interests will come first, where they and their families will have choice, and where educators will have the tools and support they need to be successful.

The Fall 2017 charter school application process seeks proposals from highly qualified applicants to open new Type 1 charter schools and transform existing district-run schools into Type 3 charter schools.

### *Focus on Quality*

The 2017 Request for Proposals (RFP) and the resulting evaluation process are rigorous and demanding. The process is meant to ensure that approved charter school operators possess the capacity to implement a school model that is likely to dramatically increase student outcomes. Successful applicants will demonstrate high levels of expertise and capacity in the areas of curriculum and instruction, school finance, educational and operational leadership, and non-profit governance, as well as high expectations for excellence in student achievement and professional standards. An application that merits a recommendation for approval will present a clear, realistic picture of how the school expects to operate; be detailed in how this school will raise student achievement; and inspire confidence in the applicant's capacity to successfully implement the proposed academic and operational plans.

### *Evaluation Process*

For the 2017 RFP cycle, OPSB partnered with the National Association of Charter School Authorizers (NACSA) to manage the application process and to provide independent, merit-based recommendations regarding whether to approve or deny each proposal. NACSA assembled an independent evaluation team that included both national and local expertise related to charter school start-up and operation. This report from the evaluation team is a culmination of three stages of review:

#### **PROPOSAL EVALUATION**

The evaluation team conducted individual and group assessment of the merits of the proposal based on the complete written submission. In the case of experienced school operators, OPSB and NACSA supplemented this written evaluation with due diligence to verify claims made in the application related to past performance.

#### **CAPACITY INTERVIEW**

After reviewing the application and discussing the findings of their individual reviews, the evaluation team conducted an in-person interview to assess the team's overall capacity to implement the proposal as written in the application.

#### **CONSENSUS JUDGMENT**

Following the capacity interview, the evaluation team came to consensus regarding whether to recommend the proposal for approval or denial. The duty of the evaluation team is to recommend approval or denial of each application based on its merits against OPSB-approved evaluation criteria. The authority and responsibility to decide whether to approve or deny each application rests with the members of OPSB.

### *Report Contents*

This evaluation report includes the following:

#### **PROPOSAL OVERVIEW**

Basic information about the proposed school as presented in the application.

#### **RECOMMENDATION**

An overall judgment regarding whether the proposal meets the criteria for approval.

#### **EVALUATION**

Analysis of the proposal based on four primary areas of plan development and the capacity of the applicant team to execute the plan as presented:

School: academic model and schedule, LEA status, special student populations, goals and metrics, enrollment plans, school culture, and family and community engagement.

People: founder's submission, governing board, staff, mission critical partners, and education service providers.

Operations: start-up plan, facility, and financial readiness.

Finance: budget.

## EVALUATION: ADDENDA

For applicants on the existing or experienced operator tracks, applicants that are or will form a corporate partnership, schools whose primary instructional environment is computer-based or virtual, applicants seeking or potentially willing to seek a match to operate an existing Orleans public charter school or school facility, or applicants seeking to start, transform or convert a school serving Grades 9-12, an analysis of:

Experienced Operator Addendum (if applicable): past school performance, growth plan, scale strategy, and risks and associated contingency plans.

Corporate Partnership Addendum (if applicable): corporate partnership formation, corporate partner track record, legal relationships, and organizational structure.

Virtual School Addendum (if applicable): location, educational program, instructional staff, state and federally mandated services, evaluation and assessment, school operations, and parent and community involvement.

Transformation Addendum (if applicable): transformation overview, operator track record, educational program, school operations, metrics and goals, and community engagement.

High School Addendum (if applicable): state and district graduation standards, supporting success for all students – truancy prevention, remediation and intervention, ensuring college and career readiness, and strong start – ninth-grade transition plan.

## RATINGS CHARACTERISTICS

Evaluation teams assess each application against the published evaluation criteria. In general, the following definitions guide evaluator ratings:

### Meets the Standard

The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant's capacity to carry out the plan effectively.

### Meets the Standard with Reservations

The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.

### Approaches the Standard

The response meets the criteria in some respects but has substantial gaps in a number of areas.

### Does Not Meet the Standard

The response is wholly undeveloped or significantly incomplete; demonstrates lack of preparation; or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.

## PROPOSAL OVERVIEW

*Applicant Name:*

**LEGACY OF EXCELLENCE**

*Proposed School Name:*

**BENJAMIN FRANKLIN ELEMENTARY MATHEMATICS AND SCIENCE  
SCHOOL**

*Mission:*

The mission of Benjamin Franklin Elementary Mathematics and Science School is that all will excel academically and individually.

*Proposed Location:*

Orleans Parish

*Enrollment Projections:*

<i>Academic Year</i>	<i>Planned # Students</i>	<i>Maximum # Students</i>	<i>Grades Served</i>
2018-19	770	822	PK-8
2019-20	770	822	PK-8
2020-21	770	822	PK-8
2021-22	770	822	PK-8
2022-23	770	822	PK-8
At Capacity	770	822	PK-8

## EXECUTIVE SUMMARY

*Recommendation:*

### **BENJAMIN FRANKLIN ELEMENTARY MATHEMATICS AND SCIENCE SCHOOL**

**DENY**

#### *Summary Analysis:*

The evaluation team recommends denial of Legacy of Excellence's (Legacy) application for Benjamin Franklin Elementary Mathematics and Science School (BFE). While several sections of the application met the standard, other sections lacked critical details and demonstration of capacity.

As a district-run school, BFE has an established track record of consistent academic performance and staff and leadership stability. Overall, the applicant demonstrates acknowledgment of challenges and areas of growth. However, governing board capacity remains a significant concern. Specifically, the governing board did not fully demonstrate how it would provide effective academic, financial, and administrative oversight of the school, particularly in regards to supporting and evaluating school leadership.

The applicant highlighted the past performance of Benjamin Franklin Elementary, which has consistently earned a "B" rating on the Louisiana School Performance Score over the past four years. To address the performance gaps and stagnation in absolute growth, the school has consciously implemented high-quality practices such as providing additional training for teachers and targeted student tutoring.

Upon conversion, the applicant would assume responsibilities that are currently under the purview of OPSB (such as reporting budgeting, purchasing, etc). It would rely on an experienced service provider, 4th Sector Solutions, to mitigate those new financial challenges for both the governing board and staff.

Though there were inconsistencies and missing details across the application, there was consistent and comprehensive information on BFE's educational model. Based on the school's past performance, in conjunction with the information provided in the application, request for clarification, and interview, the evaluation team believes that Legacy would deliver consistent student academic achievement results. However, in conjunction with the academic program, Legacy would need to build on its ability to provide effective governance oversight and leadership evaluation.

#### *Summary of Section Ratings:*

Opening and maintaining a successful, high-performing charter school depends on having a complete, coherent plan and identifying highly capable individuals to execute that plan. It is not an endeavor for which strengths in some areas can compensate for material weaknesses in others. *Therefore, in order to receive a recommendation for approval, the application must Meet the Standard in all areas.*

#### **SCHOOL**

Meets the Standard

#### **EXPERIENCED OPERATOR ADDENDUM**

Meets the Standard

#### **PEOPLE**

Approaches the Standard

#### **OPERATIONS**

Meets the Standard

#### **FINANCE**

Meets the Standard

## SCHOOL

## RATING:

**BENJAMIN FRANKLIN ELEMENTARY MATHEMATICS AND SCIENCE SCHOOL**

**Meets the Standard**

### *Plan Summary:*

Legacy proposes a Type 3 Conversion charter school with an existing operator, Benjamin Franklin Elementary Mathematics and Science School (BFE). It is a proposed principal-led conversion of an OPSB direct-run school with a Grades PK-8 configuration projected to serve 770 students in 2018-19.

The education model uses commercial subject area curricular models, aligned with the Louisiana State Standards, such as Eureka Math and Success For All. Formative and summative assessment systems are aligned with the Louisiana State Standards and the school's student performance goals.

As a math and science-themed school, these two subjects are integrated throughout the curriculum. In ELA classes, students read material with science and math themes. Science content is used to teach grammar and writing and writing assignments are aligned with science and math standards.

### *Analysis:*

The School section meets the standard. Benjamin Franklin Elementary currently uses a cohesive set of best practices and research-based models that would continue after the school is chartered. It features commercially available curricular models for Grades PK-8 in all major subject areas that are aligned to Louisiana State Standards. The proposed instructional program uses prominent, professionally credible instructional strategies and techniques.

The applicant identified formative and summative assessment systems that clearly align with various curricular areas. For example, LEAP 360 is administered three times a year and replaces previously used diagnostic and interim assessments in math and ELA. In Grades K-3, DIBELS is administered. In addition, the application presented a professional development program that features a variety of credible components and associated activities.

Staff and community support for the conversion is strong. The applicant was able to justify the anticipated enrollment of 770 students, which is consistent with current enrollment numbers, by articulating the high level of buy-in from staff and families who currently attend the school.

Despite some performance gaps, for subgroup populations in particular and stagnation in growth, the review team remains confident that the applicant can deliver a quality education program. Benjamin Franklin Elementary has consistently earned a "B" rating on the Louisiana School Performance Score over the past four years. To increase performance, leadership have implemented high-quality practices such as providing additional training for teachers and targeted student tutoring.

## PEOPLE

## RATING:

**Approaches the Standard**

**BENJAMIN FRANKLIN ELEMENTARY MATHEMATICS AND SCIENCE SCHOOL**

### *Plan Summary:*

Ms. Charlotte Matthews has been a school leader at BFE since 2006 and would continue to lead BFE through the conversion to charter status. Other key leaders include Tommie Vassel, Legacy's governing board president, and two assistant principals, Patrice Joseph and Nichelle Logan Jones. The majority of the proposed school leadership team is currently in place at the existing school.

The proposed governing board currently includes four members with combined experience in accounting, higher education administration, social work, teaching, and fundraising. The application includes descriptions of staff recruitment plans, qualifications, and salaries, along with teacher expectations, professional development, support, and evaluations.

Benjamin Franklin Elementary has established mission-critical partners and multiple community relationships and support structures, including Tulane University, University of New Orleans, Xavier Confucius Institute, Dillard University, Project Lead the Way, and STAIRS.

### *Analysis:*

The People section approaches the standard. While the application met some of the criteria, some sections lacked critical details and demonstration of capacity. Specifically, the evaluation team remains concerned about the capacity of the proposed governing board.

Overall, the governing board's understanding of its full scope of responsibilities was not wholly evident in the application, the request for clarification, or the interview. While each board member's described role aligns with some of the skills needed for an effective governing board, there was an overall demonstrated lack of capacity. The governing board, in its current composition, did not contain specific qualifications for the proposed subcommittees described in the application, namely academics, finance and operations, and fundraising and development.

In addition, it remains unclear how the governing board would provide effective academic, financial, and administrative oversight of the school, especially in regards to supporting and evaluating school leadership. From the information presented in the application, it is difficult to assess whether the governing board will gather sufficient data to evaluate whether the school leader has met the performance standards. For example, the proposed performance standards are aligned with the school's goals, but are not aligned with the rubric, which indicates performance expectations related to academics, finance, culture, and staffing. It also unclear what actions the governing board would take if the school leader's evaluation indicated that goals were not being met. During the interview, the one board member present did not exhibit deep knowledge of this critical responsibility.

The school leadership and management teams have the collective qualifications to implement the school design successfully, including capacities in areas such as school leadership and administration; curriculum, instruction, and assessment; performance management; and parent and community engagement. Upon clarification and through the interview, the applicant identified essential responsibilities necessary to implement the structures, policies, and practices essential to the school's mission and vision.

The individuals who will lead, administer, and operate BFE have the individual and collective capacity, academic backgrounds, and professional experiences necessary to lead and manage a district school. However, the current iteration of the governing board would need to fully comprehend its oversight and governance responsibilities to safeguard its ability to operate as a high-quality charter school.

## OPERATIONS

## RATING:

**Meets the Standard**

**BENJAMIN FRANKLIN ELEMENTARY MATHEMATICS AND SCIENCE SCHOOL**

### *Plan Summary:*

As a conversion charter school, BFE proposes to remain at its two current locations, with the upper school (Grades 6-8) at the Nashville campus (401 Nashville Avenue) and the lower school (Grade PK-5) temporarily at the Lakefront campus (6101 Chatham Drive). The lower school will move back to the Jefferson campus (1116 Jefferson Avenue) once facility renovations have been completed.

The applicant presented a start-up plan that included transportation, safety and security, and insurance coverage. The plan is presented as a transition plan from its present relationship with OPSB to an independent charter school. A data manager will manage the day-to-day financial operations of the school and will work with the third-party provider, 4th Sector Solutions, on additional financial responsibilities. 4th Sector Solutions will provide financial management, reporting, and human resources services.

### *Analysis:*

The Operations section meets the standard. The proposed start-up plan, facility plan, and demonstration of financial readiness was substantive.

In recognition of the new operational responsibilities it will gain as a charter school, BFE will astutely rely on 4th Sector Solutions for financial management and reporting services. Services by 4th Sector Solutions will include a comprehensive summary of fiscal oversight, policies, processes, methods and protocol for the fiscal management of BFE's fiscal affairs, including generally accepted accounting and auditing standards. 4th Sector Solutions will also provide budget forecasts that include the usual scope of revenues and expenses consistent with present BFE fiscal practices.

Upon initial review of the application, the information regarding 4th Sector Solutions appeared to be boilerplate language that was not tailored to BFE. However, upon further clarification and during the interview, it became evident that the school leadership team demonstrated a full awareness of its budget responsibilities. Operationally, school leadership is building upon district-based experiences via 4th Sector Solutions, which will provide a start-up team that will guide school leadership through such responsibilities as contracts, reporting compliance, and audits.

The evaluation team is encouraged that the applicant is honing its capacity to oversee 4th Sector Solutions to ensure that all business affairs and fiscal resources are well-positioned to immediately meet the school's needs and obligations. In addition, this partnership will allow BFE to more effectively manage unexpected operational events that might stress the school's fiscal resources and impair BFE's demanding educational model. While school leadership are familiar with managing a direct-run school, they are in the process of developing effective monitoring practices of the service provider in order to operate as a successful autonomous charter school.

## FINANCE

## RATING:

**Meets the Standard**

**BENJAMIN FRANKLIN ELEMENTARY MATHEMATICS AND SCIENCE SCHOOL**

### *Plan Summary:*

The application details the five-year financial projections as follows:

Year 1: \$8,779,012 in revenues and \$8,563,419 in expenses, with an ending fund balance of \$215,592.

Year 5: \$9,425,676 in revenues and \$9,359,758 in expenses, with an ending cumulative fund balance of \$561,654.

The base budget assumes 735 students in Grades K–8, with an additional 35 students enrolled in PK. The same enrollment pattern is assumed for each year of operation. The budgets included projections for local, state, federal, and other revenue sources. Budget assumptions were provided in the narrative and with individual line-items. The budget narrative provided a description of conservative assumptions for enrollment, funding, staffing, and operating expenses based on the current year operation as a district school.

### *Analysis:*

The Finance section meets the standard. The applicant's proposed approach to budgeting and fiscal planning were consistent with generally accepted business, accounting and auditing practices. Projections presented are primarily based on accurate, conservative, and legally compliant assumptions. There is no evidence that the school will become insolvent or lack access to the necessary amount of liquidity.

There was an initial concern regarding the contingency fund as described in the application, which was not clearly specified in the budgets. ("The adopted school budget will include a contingency, which is designed for two purposes: (1) to minimize the effect to the program for negative events such as emergency facility repairs, enrollment shortfalls or unforeseen education needs; and (2) to build a reserve for future emergencies or facility needs." ) (Application, p. 57.) Upon clarification, the contingency fund was designed to be the annual projected surplus, which is projected to be over \$215,000 after the first year of operation. Given the conservative budgeting approach, the evaluation team remains confident that the budgeting assumptions are adequate.

By partnering with 4th Sector Solutions, the applicant is gaining a clear understanding of the difference between a district and charter school budget, and ensuring that critical assumptions for staff salaries, benefits, transportation costs, purchasing, and service provider fees are sound.

## EXPERIENCED OPERATOR ADDENDUM

### RATING:

**Meets the Standard**

**BENJAMIN FRANKLIN ELEMENTARY MATHEMATICS AND  
SCIENCE SCHOOL**

#### *Plan Summary:*

At present, Legacy has no plans to replicate or expand BFE. According to the latest Louisiana school report card, BFE is rated as a "B" school with a School Performance Score (SPS) of 90.2.

Performance data and evidence was presented in the application narrative and with attachments. Data and evidence were presented on past performance of BFE. Attachment EO-2 provided a set of spreadsheets that included an Operator Portfolio Overview, Operator Academic Data, and Operator Track Record. These sheets provided contact information for the proposed school leader, Charlotte Matthew, in addition to student socio-demographic information and some assessment data.

BFE has not had any performance deficiencies or compliance violations that have led to authorizer interventions. Neither Legacy's nor BFE's leaders have been involved in any material audit findings.

#### *Analysis:*

The Experienced Operator Addendum meets the standard. The applicant provided comprehensive information about past school performance, in addition to the school's growth plan, scale strategy, risks, and associated contingency plans.

The applicant highlighted the past performance of Benjamin Franklin Elementary, which has consistently earned a "B" rating on the Louisiana School Performance Score over the past four years. To address the performance gaps and stagnation in absolute growth, the school has consciously implemented high-quality practices such as providing additional training for teachers and targeted student tutoring.

The applicant has thoughtfully identified the following four threats in converting to a charter school, along with the associated measures it will take to minimize them. The challenges include: 1) financial constraints; 2) new and unfamiliar responsibilities; 3) building board ability and capacity; and 4) facility readiness. By recognizing its vulnerabilities, the applicant has been able to anticipate and mitigate the risks by identifying supports upfront. In three of the four risks, the service provider, 4th Sector Solutions, was identified as the primary support with the Louisiana Association of Public Charter Schools identified to provide governing board capacity support.

Through identified refinements and adaptations, BFE intends to continue to offer a quality education model that will remain attractive to parents and students in the Orleans Parish community.

## EVALUATOR BIOGRAPHIES

### *Evaluator's Name*

#### **SONIA C. PARK**

Ms. Park has over 18 years of experience in school start-up, support, accountability, and development. She has a background in organization and school development, support, and accountability in relation to school-based, district, state, and federal policies and practices. Prior to leading the Diverse Charter Schools Coalition, she served under Secretary John King at the US Department of Education as a Senior Policy Advisor in the Office of Innovation and Improvement where she worked on policies concerning charter schools. Previously, Ms. Park was the Executive Director of Manhattan Charter Schools, a two-school charter network located in lower Manhattan. She has also worked under the New York City Department of Education's Chancellor Denis Walcott as the Executive Director of Charter Schools and Accountability and Support. Other prior experiences include the NY Charter Schools Resource Center, NY Charter Schools Association, and Edison Schools.

### *Evaluator's Name*

#### **DR. IRIS PALAZESI**

Dr. Palazesi is an independent education consultant specializing in the areas of charter school applications, grant applications, and educational research. She has worked successfully with clients to secure over \$21M in grant awards and over eighty approved charter school applications. Dr. Palazesi served on the board of directors of a high-performing charter school in Tallahassee, Florida for nine years, including four years as board chair. Dr. Palazesi has also worked for the Florida Department of Education as a Program Specialist for Gifted Students, Supervisor of Exceptional Student Education Services, and Interim Administrator for Title I. Prior to moving to Florida, Dr. Palazesi was a university professor at Ball State University in Muncie, IN and Thomas College in Thomasville, GA. Dr. Palazesi earned her B.A. in Elementary Education from the University of Illinois; her Master's degree in Gifted Education from Northeastern Illinois University in Chicago; and her Doctoral degree from the University of Illinois.

### *Evaluator's Name*

#### **DR. WILLIAM MILLER**

Dr. Miller is a former high school teacher and retired staff member of the Louisiana Department of Education (LDOE). While on the LDOE staff he was engaged in a broad scope of regulatory, administrative, and policy-formation activities including the implementation of the Louisiana Charter School Program. Since retirement from the LDOE, he has continued as a program evaluator for the the Louisiana State Board of Elementary and Secondary Education (BESE), a teacher practitioner mentor, and a charter school application reviewer for the National Association of Charter School Authorizers (NACSA). He received his Bachelor's, Master's, and Doctoral degrees in Education from the University of New Orleans.