

ORLEANS PARISH SCHOOL BOARD

CHARTER SCHOOL APPLICATION RECOMMENDATION REPORT 2017

National Association of Charter School Authorizers

November 10, 2017

New Charter School Application for

**MARY MCCLEOD BETHUNE ELEMENTARY SCHOOL OF LITERATURE AND
TECHNOLOGY**

Submitted by

SIGNIFICANT EDUCATORS

Evaluation Team

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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. Student 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 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 proposal 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 – 9th 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:

SIGNIFICANT EDUCATORS

Proposed School Name:

MARY MCCLEOD BETHUNE ELEMENTARY SCHOOL OF LITERATURE AND TECHNOLOGY

Mission:

The mission of Mary McLeod Bethune Elementary is to increase academic success by promoting educational development for all learners.

Proposed Location:

Orleans Parish

Enrollment Projections:

<i>Academic Year</i>	<i>Planned # Students</i>	<i>Maximum # Students</i>	<i>Grades Served</i>
2018-19	762	789	PK-8
2019-20	762	789	PK-8
2020-21	762	789	PK-8
2021-22	762	789	PK-8
2022-23	762	789	PK-8
At Capacity	762	789	PK-8

EXECUTIVE SUMMARY

Recommendation:

MARY MCCLEOD BETHUNE ELEMENTARY SCHOOL OF LITERATURE AND TECHNOLOGY

DENY

Summary Analysis:

The evaluation team recommends denial of Significant Educators' application for Mary McCleod Bethune Elementary School of Literature and Technology (MMBE). Overall, the application lacked critical details and demonstration of capacity across all sections.

Based on the information provided in the application, request for clarification, and interview, it is unclear that the applicant and school leadership are fully aware of the roles and responsibilities they will inherit upon being chartered.

MMBE's academic performance has demonstrated little growth, with the school earning a "C" in its most recent rating on the Louisiana School Performance Score, a drop from the "B" rating it achieved during the past three years. To address performance gaps for subgroup populations and stagnation in absolute growth, the school hired interventionists, provided additional training for teachers, instituted more frequent professional development, and increased student tutoring. Despite these efforts, it still remains unclear how these practices were part of an intentional, comprehensive improvement plan.

The applicant is cognizant of its unfamiliarity with the responsibilities it would assume upon conversion to a charter school, such as reporting, budgeting, and purchasing. For these critical tasks it would rely on an experienced service provider, 4th Sector Solutions, to provide school-based personnel with additional training and support in budget development and operations.

Though there were inconsistencies and missing details across the application, there was consistent and comprehensive information on MMBE's educational model. Based on its record of past performance and the information provided throughout the application process, the applicant only partially demonstrated how it would deliver higher student academic outcomes as a charter school. Coupled with the need to improve recent academic results, Significant Educators would also need to strengthen internal structures to operate as a high-performing charter school.

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 with Reservations

EXPERIENCED OPERATOR ADDENDUM

Meets the Standard with Reservations

PEOPLE

Approaches the Standard

OPERATIONS

Approaches the Standard

FINANCE

Meets the Standard with Reservations

SCHOOL

RATING:

**MARY MCCLEOD BETHUNE ELEMENTARY SCHOOL OF
LITERATURE AND TECHNOLOGY**

Meets the Standard with Reservations

Plan Summary:

Significant Educators (the applicant) proposes a Type 3–Conversion of an existing district-run school, Mary McCleod Bethune Elementary of Literature and Technology (MMBE). It is a proposed principal-led conversion with a PK-8 configuration projected to serve 762 students in 2018-19.

MMBE utilizes the Understanding by Design (UbD) framework. The education model uses Louisiana State Standards-aligned commercial subject area curricular models, such as Eureka Math and Houghton Mifflin Journeys. MMBE currently uses, and plans to continue to use, a set of interim assessments to provide baseline data for formative assessment. The school has a literature and technology theme and delivers on-line assessments and computer-based curricula for reading skills.

Analysis:

The School section meets the standard with reservations. Although the applicant was generally responsive to the application requirements, it was less evident how Significant Educators will be able to improve its academic performance based on MMBE's existing academic record and internal analyses that have taken place.

The applicant highlighted the academic performance of MMBE, which has earned a "C" rating on the Louisiana School Performance Score (SPS) for 2017, dropping from the "B" it received in past years. To address the performance gaps and stagnation in absolute growth, especially in Math, high-quality practices have been implemented this year. For example, the school has hired interventionists, provided additional training for teachers, more frequent professional development, and increased student tutoring. However, the applicant did not clearly demonstrate how these practices were part of a comprehensive, school-wide, data-driven improvement plan.

The applicant identified comprehensive formative and summative assessment systems that align with the proposed curricular areas. For example, LEAP 360 is administered twice a year in grades 3-8 and DIBELS in Kindergarten-grade 3. In addition, the application presented a professional development program which features a variety of credible components and associated activities. Assessments are fully aligned with the Louisiana State Standards and the school's student performance goals, yet it is unclear how assessment results are used to guide instruction.

Support for the school is strong. The applicant was able to justify the anticipated enrollment numbers of 762, which is consistent with current enrollment numbers, by articulating the high level of buy-in from staff and families who currently attend the school.

Even without a comprehensive improvement plan, the practices being implemented at MMBE are addressing the performance gaps and stagnation in growth. With some refinement, the evaluation team feels that the elements are in place for the applicant to deliver a quality education program as a charter school.

PEOPLE

RATING:

Approaches the Standard

**MARY MCCLEOD BETHUNE ELEMENTARY SCHOOL OF
LITERATURE AND TECHNOLOGY**

Plan Summary:

Ms. Mary Haynes-Smith, who has been principal at MMBE since 2006, would continue to lead MMBE through the school conversion. In addition, other key leaders include the Significant Educators board president, Antoinette Boissierre, two assistant principals, Crystal LaFance and Amanda Broussard, and a director of instruction, Gwendolyn Dupree. The majority of the proposed school leadership team is currently in place at the existing school.

The proposed governing board includes seven members with combined experiences that include law and education, among other areas of expertise. The application includes descriptions of staff recruitment plans, qualifications, salaries, in addition to teacher expectations, professional development, support, and evaluations.

The applicant's mission critical partners include Better Than Ezra, The New Orleans Chapter of Links, Inc., Kiwanis, The Confucius Institute at Xavier University, and Dillard University.

Analysis:

The People section approaches the standard. The application met some of the criteria; however, some sections lacked critical details and demonstration of capacity. Specifically, the evaluation team remains concerned about the governing board's and leadership's understanding of its full scope of responsibilities.

The two governing board members who attended the interview did not exhibit deep knowledge of how they would execute board responsibilities, measure the progress of the school's performance, and evaluate their own effectiveness. Although each proposed board member's described role aligns with some of the skill sets needed for an effective governing board, overall, the members did not demonstrate an awareness of its oversight responsibilities. The governing board's total membership does include individuals with quality academic, legal, and fiscal credentials. The application also defined the scope of standard governance roles, duties and responsibilities, namely for the three board committees: academics, finance and operations, and development. As stated in the application, the board has the critical responsibility for the overall supervision of academic, financial, legal, and operational affairs, as well as evaluation of the school leader who reports directly to the board.

The applicant group provided written evidence that the school leadership and management teams have the collective qualifications to implement the school design successfully, including capacities in areas such as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent and community engagement. However, the school leadership revealed a superficial understanding of charter school budgets and operations during the interview process, calling into question the applicant's capacity in this critical area.

MMBE has initiated and is cultivating a variety of partnerships with key stakeholders. Initial, substantive partnerships have begun and are listed and described.

While some of the individuals who will lead, administer, and operate MMBE demonstrate capacity, the applicant would need to further demonstrate that it is a coordinated, cohesive team that can deliver on its educational commitments and operate the school with due diligence over the school's governance, fiscal, and business affairs.

OPERATIONS

RATING:

Approaches the Standard

**MARY MCCLEOD BETHUNE ELEMENTARY SCHOOL OF
LITERATURE AND TECHNOLOGY**

Plan Summary:

As a conversion charter school, MMBE proposes to remain in its present facility at 2401 Humanity Street in Gentilly. The facility was built in 2015 and is able to house up to 750 students and has a gym; media center; three science labs; professional development room; and music, art, band, drama, and speech rooms.

A start-up plan as presented, includes transportation, safety and security, and insurance coverage. The plan is presented as a transition plan from its present relationship with the district to an independent charter school. A school-based business manager will provide day-to-day financial operations and work with a third-party provider, 4th Sector Solutions, who will provide financial management, reporting, and human resources services to MMBE.

Analysis:

The Operations section approaches the standard. While the application met some of the criteria, some sections lacked critical details and demonstration of capacity. Specifically, the school leadership team exhibited a lack of familiarity with their specific operational responsibilities.

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

However, upon further clarification and during the interview process, it became evident that the school leadership team was overly reliant on 4th Sector. The principal was unfamiliar with the budget assumptions and when asked during the interview what would be the biggest challenge to be faced during the start-up phase, she solely focused on staff hiring. It was the representative from 4th Sector that described operational functions such as issuing proposals for custodial and grounds maintenance; securing vendors; and completing state and parish reporting requirements. In addition, the information about 4th Sector included in the application appeared to be boilerplate language that was not specified for MMBE, further illustrating the applicant's disengagement in this area.

Despite the applicant's limited operational knowledge at present, the evaluation team is encouraged that Significant Educators and the school leadership will be able to develop its capacity to oversee and work with 4th Sector by strengthening effective monitoring of the service provider by school-based personnel.

FINANCE

RATING:

Meets the Standard with Reservations

**MARY MCCLEOD BETHUNE ELEMENTARY SCHOOL OF
LITERATURE AND TECHNOLOGY**

Plan Summary:

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

Year 1: \$7,469,939 in revenues and \$7,227,800 in expenses, with an ending fund balance of \$242,140.

Year 5: \$8,605,910 in revenues and \$8,502,825 in expenses, with an ending cumulative fund balance of \$1,061,182.

The base budget assumes 668 students in Grades K-8 in year 1, and another 60 in pre-K. The K-8 enrollment increases slightly to a stabilized level of 702 as the 7th and 8th enrollment stabilizes at 78 students, the same as every other grade. 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 assumptions for enrollment, funding, staffing and operating expenses based on the current year operation as a district school.

Several budgets were provided, including a start-up budget, first year cash flow, and a five-year forecast.

Analysis:

The Finance section meets the standard with reservations. While the application met some of the criteria, some sections lacked critical details. Specifically, there are remaining budgetary concerns regarding first year cash flow. There was evidence that the school would lack access to the necessary amount of liquidity during its first year as a charter.

MMBE will run a deficit during the first year of operation. Both the original and revised cash flow budgets show the school in deficit for eight of 12 months. When asked about the deficit during the interview, the governing board stated it would seek a line of credit to cover the deficits. However, it remained unclear if the governing board understood the issue and would reevaluate the budget to prevent or reduce the frequency of the deficits. This was an indicator of the lack of financial capacity on the board and leadership team.

Though the applicant is familiar with managing a district school budget, as an autonomous charter school, it would have to develop effective budget creation and oversight strategies. The applicant did not convince the evaluation team that they have a collective and comprehensive understanding of how 4th Sector has drafted the school's budget and what assumptions are being made for staff salaries, benefits, transportation costs, purchasing, and service provider fees.

EXPERIENCED OPERATOR ADDENDUM

**MARY MCCLEOD BETHUNE ELEMENTARY SCHOOL OF
LITERATURE AND TECHNOLOGY**

RATING:

Meets the Standard with Reservations

Plan Summary:

At present, Significant Educators have no plans to replicate or expand MMBE. According to the latest Louisiana school report card data, MMBE is rated as a "C" school with an SPS of 72.2.

Data and evidence were presented on past academic performance of MMBE. Attachment EO-2 provided a set of spreadsheets that included an Operator Portfolio Overview, Operator Academic Data, and Operator Track Record. The sheets provided contact information on Mary Haynes-Smith, student socio-demographic information, and some assessment data.

MMBE has not had any performance deficiencies or compliance violations that have led to district interventions. Neither Significant Educators' nor MMBE's leaders have been involved in any material audit findings.

Analysis:

The Experienced Operator Addendum section meets the standard with reservations. While the application met some of the criteria, the lack of growth and decline in the academic performance of MMBE remains a concern.

MMBE recently earned a "C" rating on the Louisiana School Performance Score (SPS), dropping from the "B" it received in past years. The academic program and the performance of MMBE has demonstrated little growth. Strategies to address the performance gaps and stagnation in absolute growth, especially in math, have been implemented this year. The school has hired interventionists, provided additional training for teachers, more frequent professional development, and increased student tutoring. However, the applicant did not clearly demonstrate how these practices were part of a comprehensive, school-wide, data-driven improvement plan.

Significant Educators has thoughtfully identified the following four risks in converting to a charter school, along with the associated measures it will take to minimize them. The challenges include: 1) financial constraints; 2) staff retention; 3) new and unfamiliar responsibilities; and 4) building board capacity. By recognizing its vulnerabilities, the applicant has been able to anticipate and mitigate the risks by identifying supports before issues arise. In two of the four risks, the service provider, 4th Sector, was identified as the support; for board capacity, the Louisiana Association of Public Charter Schools has been identified. Also, the applicant actively communicated about the conversion with staff in order to retain them.

MMBE presents a stable and popular district school that is in the process of improving its academic performance.

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 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.