

**ORLEANS PARISH SCHOOL BOARD**

# CHARTER SCHOOL APPLICATION RECOMMENDATION REPORT 2017

*National Association of Charter School Authorizers*

**November 10, 2017**

*New Charter School Application for*

**THE QUERENCIA SCHOOL**

*Submitted by*

**THE CENTER FOR RESILIENCE**

*Evaluation Team*

**TEAM LEAD: SONIA C. PARK**

**EVALUATORS: DR. IRIS PALAZESI**

**DR. WILLIAM MILLER**

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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 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 – Grade 9 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:*

**THE CENTER FOR RESILIENCE**

*Proposed School Name:*

**THE QUERENCIA SCHOOL**

*Mission:*

The Querencia School cultivates empathy, agency, and self-awareness in an academically rich, therapeutically sound, and culturally sustaining school “home” for kids of diverse backgrounds.

*Proposed Location:*

Orleans Parish

*Enrollment Projections:*

| <i>Academic Year</i> | <i>Planned # Students</i> | <i>Maximum # Students</i> | <i>Grades Served</i> |
|----------------------|---------------------------|---------------------------|----------------------|
| 2018-19              | 180                       | 225                       | K-2                  |
| 2019-20              | 240                       | 300                       | K-3                  |
| 2020-21              | 320                       | 395                       | PK-4                 |
| 2021-22              | 380                       | 470                       | PK-5                 |
| 2022-23              | 440                       | 545                       | PK-6                 |
| At Capacity          | 560                       | 695                       | PK-8                 |

## EXECUTIVE SUMMARY

*Recommendation:*

### THE QUERENCIA SCHOOL

**APPROVE**

#### *Summary Analysis:*

The evaluation team recommends approval of the Center for Resilience (CFR) application for The Querencia School (Querencia). Overall, CFR reflects an understanding of key issues. The applicant provided specific 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.

CFR proposes to open a Type I–new start charter school that will eventually serve students in Grades PK-8. The unique education model proposes to address Louisiana and Orleans Parish's priority commitment to improved levels of student academic achievement through a constructivist educational model. The model also features the creation of a "trauma-informed school culture" component which will provide explicit social/emotional support for students.

The founding team, which includes Dr. Elizabeth Marcel, the proposed school leader, and William Murphy, the proposed governing board chair, bring many years of education and charter school experience to Querencia. Both individuals have over 17 years of experience in K-12 education and contribute deep capacity to the team. The applicant provided substantial evidence that the people involved with the start-up of Querencia have the academic credentials and professional experience to lead and operate the school. The eight member governing board has a range of robust experience and expertise that includes backgrounds in law, education, social work, nonprofit and mental health. In conjunction with academic expertise, CFR will work with an experienced service provider, 4th Sector Solutions, to provide operational support for Querencia.

While the application contained inconsistencies and some missing details, the application did provide a comprehensive programmatic description of the Querencia educational model. As demonstrated through the information provided in the application, request for clarification, and interview, the evaluation team believes that Querencia will deliver consistent student academic achievement results through an innovative model. This belief is based on the experience of CFR and the school's founding team coupled with the financial and operational experience of 4th Sector Solutions.

#### *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

#### **PEOPLE**

Meets the Standard

#### **OPERATIONS**

Meets the Standard

#### **FINANCE**

Meets the Standard

## SCHOOL

## RATING:

**THE QUERENCIA SCHOOL**

**Meets the Standard**

### *Plan Summary:*

CFR proposes to start Querencia, a Type I–new start charter school, that will eventually serve 560 students in Grades PK-8. The school will initially start with 180 Grade K-2 students in 2018-19, reaching 440 Grade PK-6 students in five years.

Querencia presents a unique constructivist educational model that features a “trauma-informed school culture” component. This component will provide explicit social/emotional supports for students. One example of such supports is having teachers stay with the same class of students for two years. The education model uses commercial subject area curricular models, aligned with Louisiana State Standards, such as Eureka Math and Wit and Wisdom from Great Minds. CFR will select assessments that are fully aligned with the Louisiana State Standards and the school’s student performance goals.

### *Analysis:*

The School section meets the standard. Querencia's educational model is centered on a holistic and child-centered approach. By creating a therapeutically supportive school, students’ needs are addressed in an environment that is non-punitive and leverages developmental practices that benefit all students while creating an especially safe environment for those who may have experienced trauma.

Querencia will establish a therapeutically-informed learning environment. All components, program models, and curricula were chosen because they support a constructivist understanding of how students learn, are aligned to holistic and child-centered beliefs, and include authentic experiences. In addition to the major subject areas and as part of its trauma-informed therapeutic approach, Querencia will incorporate a social/emotional learning curricula such as Second Step or Lives in the Balance. The proposed instructional program uses prominent, professionally credible instructional strategies and techniques.

The CFR has carefully chosen its unique model to ensure the implementation of a coherent, effective educational model that benefits students both academically and emotionally. A variation of the model has already been implemented through CFR's existing therapeutic programs, which provide mental health services and placements for students with behavioral disabilities. CFR's existing programs are known as the Therapeutic Day Treatment Program and the Therapeutic Day School Program. However, this would be the first charter school in New Orleans based on this model.

The applicant is proposing an innovative and relatively unknown educational model, and CFR did not clearly demonstrate how it will attract and maintain families. However, even as a new model with limited recognition, the evaluation team is confident that the applicant can deliver a high-quality education program.

## PEOPLE

## RATING:

**Meets the Standard**

**THE QUERENCIA SCHOOL**

### *Plan Summary:*

Dr. Elizabeth Marcell is the proposed school leader of Querencia. Other key leaders include William Murphy, the proposed governing board chair, and Rochelle McConico, the director of operations.

The proposed governing board currently includes eight members with combined experience in law, education, social work, nonprofit management, and mental health. The application includes descriptions of staff recruitment plans, qualifications, and salaries, along with teacher expectations, professional development, support, and evaluations. Querencia will have one mission-critical partner, Tulane University.

### *Analysis:*

The People section meets the standard. The applicant provided substantial evidence that the people involved with launching Querencia have the academic credentials and professional experience to lead and operate the school.

The school leadership and governing board have the collective qualifications to implement the school design successfully, including experience in areas such as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent and community engagement. However, the evaluation team noted that Dr. Marcell will continue to be the chief executive officer (CEO) of CFR, which includes providing oversight to the Therapeutic Day Treatment Program and the Therapeutic Day School Program, while also launching and leading Querencia. To balance these significant responsibilities, Dr. Marcell will have three assistant directors, one at each program and one at the school.

During the interview, the governing board chair demonstrated an in-depth knowledge of the school design, organizational structure, and the school's budget. The proposed governing board members offer skills sets that are appropriately aligned to the therapeutic model of the school and also bring the qualifications needed to be an effective governing board. The governing board includes individuals with law, education, social work, nonprofit, and mental health credentials. The application defined the scope of the governance roles, duties, and responsibilities, namely for the two governing board committees: fundraising and governance. As stated in the application, the governing board is responsible for the overall supervision of the academic, financial, legal, and operational affairs of the school, as well as the evaluation of the school leader, who reports directly to the governing board.

During the interview process, the applicant was able to clearly articulate the need for this innovative, trauma-influenced model in New Orleans. They provided additional depth and context to the written application that further informed this recommendation. The applicant provided substantive information and evidence about the people who will lead, administer, and operate Querencia, which illustrated individual capacity, academic backgrounds, and professional experience.



## OPERATIONS

## RATING:

**Meets the Standard**

### THE QUERENCIA SCHOOL

#### *Plan Summary:*

As a Type 1- new start school, Querencia will need to acquire a facility. If a space is unavailable through the district, CFR will consider several private space options that include former schools and churches.

A start-up plan was presented that included transportation, safety and security, and insurance coverage. The director of operations 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 resource services.

#### *Analysis:*

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

As a practical and rational decision, CFR will contract 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 Querencia's fiscal affairs, including generally accepted accounting and auditing standards. 4th Sector Solutions will also provide budget forecasts that include the typical scope of revenues and expenses consistent with best fiscal practices. With the engagement of 4th Sector Solutions, CFR can focus on the academic and cultural foundations of Querencia.

Specific information on the third-party service provider was inconsistent and lacked detail in the initial application submission. As a financial performance task during the interview, the applicant was asked to reduce their total budget by 5 percent. They were able to effectively complete this task by rethinking nonessential items without making an impact on the academic program. Their strong demonstration of capacity alleviated initial concerns.

Through the application, request for clarification, and interview process, the evaluation team was able to determine that CFR, in partnership with 4th Sector Solutions, is well-positioned to meet the school's needs and obligations. The applicant has the capacity to address unexpected operational events that might stress the school's fiscal resources and be detrimental to the Querencia educational model.

*Plan Summary:*

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

Year 1: \$2,858,195 in revenues and \$2,682,015 in expenses, with an ending fund balance of \$176,180.

Year 5: \$6,318,064 in revenues and \$5,674,192 in expenses, with an ending cumulative fund balance of \$1,615,731.

The base budget assumes 195 students in Grades K-1, which will expand one grade per year (at a class size of 65 students). At Year 3, the school plans to add one section of 20 Grade PK students while continuing to add one upper grade until Year 5 when the school will have a total of 410 students in Grades PK-5.

The budget 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 included descriptions of conservative assumptions for enrollment, funding, staffing, and operating expenses.

*Analysis:*

The Finance section meets the standard. The applicant's proposed approach to budgeting and fiscal planning was consistent with generally accepted business, accounting and auditing practices. Projections presented are primarily based on accurate, conservative, and legally-compliant assumptions.

CFR, in conjunction with 4th Sector Solutions, has developed a conservative budget to ensure financial stability during its first years of operation. Assumption of student enrollment for Year 1 is 195 students. Yet, the applicant, through careful analysis and spending, would be able to operate the school with 150 students without compromising the educational program.

There was an initial concern about budget assumptions, which included a discretionary grant and cash flow deficits during Querencia's first year of operations. The applicant described several sound approaches to mitigate the deficit, including delaying certain payments for third-party contracts and seeking to increase enrollment. Given the conservative budgeting approach, and the in-depth financial knowledge demonstrated by the applicant, the evaluation team remains confident that the budget assumptions are adequate.

## 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. Iris 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.