

TO: Dr. Henderson Lewis, Superintendent, Orleans Parish School Board
Forrest Collins, Director of New School Development, Orleans Parish School Board
FROM: The Significant Educators, applying board for Mary Bethune Elementary School of Literature and Technology
DATE: November 14, 2017
RE: Response to Fall 2017 OPSB Charter RFA Independent Recommendation Report for Mary Bethune Elementary School of Literature and Technology

Introduction

Thank you for the opportunity to respond to the Charter School Application Recommendation Report for the Type 3 application from the Significant Educators. We appreciate the chance to respond to and clarify the concerns and points raised within the evaluation report. Please see below for the Significant Educators' responses, organized by section as per the report.

School

The evaluation report states "the applicant did not clearly demonstrate how these practices were part of a comprehensive, school-wide, data-driven improvement plan." However, the plan that was described in both the written application and during the interview speaks to this comprehensive plan, which includes the components that the evaluation report describes as "high-quality practices."

As stated, the Bethune leaders have already created and are implementing a comprehensive improvement plan, particularly in the area of mathematics. The improvement plan is based on data and student results, as the team conducted a holistic academic review to determine areas of need. As stated in the application and during the interview, the plan includes the following components:

- *Staffing:* Bethune hired new math teachers to replace those who did not perform last year, as measured by student achievement and progress on assessments. Additionally, Bethune also already hired four math interventionists who will provide additional support to struggling students.
- *Professional development and training:* Bethune increased the amount of training and development that they provide to teachers overall, and within mathematics. This also includes a number of teachers who participate in the Algebra Project, a National Mathematics Literacy Program. Bethune has fully implemented the TAP model, a proven and comprehensive development system. (Described in detail on pages 10-11 and 49-50 of the revised application.) Bethune also utilizes LDOE remediation guides to provide additional support for teachers.
- *Increased instructional time:* Bethune is providing additional instructional time for struggling students through afterschool tutoring and interventions.
- *Tools and curriculums:* Bethune is implementing new curricula, including Eureka Math, as well as the high-quality state instructional guides. We are currently reviewing potential math intervention programs, as stated in the interview: COMPASS Learning, iReady, and Dreambox Learning.

In the revised application that was submitted on October 13, 2017, the Significant Educators provided details on this plan on pages 10 and 11:

“The Significant Educators recognize a need for improvement in the areas of Math and Science, as shown in the comparison between school, district, and state proficiency levels in Figure 1. **The current leaders of Bethune have already begun to address these proficiencies through the adoption and implementation of Eureka Math curriculum, and through the school’s participation in the Algebra Project, a National Mathematics Literacy Program.** The Algebra Project is aimed at helping students successfully achieve mathematical skills that are necessary prerequisites for high school college preparatory math.

Bethune recently hired math interventionists to work with small groups of students who are struggling with grade level materials and need more intensive support. The interventionists will work with students to develop mathematical fluency, speed and accuracy with procedural skills and calculations, and conceptual understanding.”

Though the evaluation report states that the applicant is lacking a “comprehensive, school-wide, data-driven improvement plan,” no information was provided regarding what areas of the school were not addressed that lead to the existing plan, the components of which were deemed “high quality practices,” were not comprehensive of data-driven.

Additionally, the report states “it is unclear how assessment results are used to guide instruction.” In the revised application on pages 9 and 10, the Significant Educators detail the use of assessments and their impact on instruction:

“All teachers attend a weekly, hour-long cluster group meeting that is led by members of the instructional leadership team. Cluster meetings occur during the regular school day, making collaboration and development time for staff members within their grade-level bands. **The content of cluster meetings is determined by the school’s instructional leadership team through an analysis of student and teacher data.** Cluster meetings introduce new instructional strategies to teachers, provide support in how to utilize curriculums and resources, and **conduct reviews and analyses of student work and data.** If teachers within a particular grade level or subject area need support using a specific curriculum or **understanding an assessment system, Master Teachers tailor the content of that week’s (or multiple weeks’) cluster meeting to master that topic.**

Bethune will also **continue to utilize monthly academic reviews to support teachers in analyzing their student assessment data and using it to create targeted action plans for student support and reteaching.** Each month, the instructional leadership team **meets with teachers individually to review student-level academic data and reflect on its strengths, weaknesses, and indications for the future.** The main focus of these academic review meetings is to determine what teachers are doing and should start doing to propel the lowest performing students upwards, while still pushing their highest performing students to continue achieving above grade level. Teachers and

leaders discuss what differentiation methods should be utilized and what support the teacher needs in executing his or her plan. Follow-up observations are completed by the instructional leaders to ensure that teachers are effectively implementing the strategies and differentiation techniques contained in their academic review plans and that they are leading to successful outcomes for students.”

People

The evaluation report stated “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.” The Significant Educators factually disagree with this statement, as the two board members in attendance at the interview described in detail their plan to engage in a strategic planning session, participate in a board retreat, evaluate the school leader, monitor 4th Sector and the finances, and otherwise govern the school consistent with the Orleans Parish Charter School Performance Framework. In addition, the board members described the development process that they will engage in as a collective board, including participating in board development provided by the Louisiana Association of Public Charter Schools, the National Alliance for Public Charter Schools, and customized planning sessions with local experts.

This description provides both high level areas of responsibility as well as specific examples of key board responsibilities. Additionally, the board contains members who have served on charter boards in the past and/or have worked in leadership roles within charter schools, and therefore already possess firsthand knowledge of board responsibilities and will be sharing this knowledge with other board members.

With regard to evaluation of school performance, during the interview and on page 45 of the revised application in the governance section, the Significant Educators describe the areas in which they will be evaluating the school leader and therefore the school: academic performance, financial performance, cultural performance, and staff performance. The information/data components that will be considered for the evaluation and the source or method of evaluation are also detailed within this section.

Furthermore, the written application states on page 43:

“All board members **will be responsible for the overall supervision of academic, financial, legal, and operational affairs of Bethune, as well as the evaluation of the school leader**, who will report directly to and be hired and evaluated by the board. In addition, the board will consist of three committees, each with a specific purpose:

- **Academics:** analysis of school academic and cultural data, and progress toward meeting stated performance goals
- **Finance and Operations:** review financial information and approve budgets; facility oversight; handle legal issues
- **Development:** secure additional funding that enhances the programs and mission of Bethune; primary board liaison with community and partners”

As stated in the application, the board evaluate their effectiveness as the Significant Educators' Board in large part through the effectiveness of the school, as measured by their evaluation of the school leader. The board will be successful if the school is meeting and exceeding targets for academics, finances, culture and staff performance – all consistent with the OPSB Charter School Performance Framework.

Additionally, the evaluation report states “the school leader revealed a superficial understanding of charter school budgets and operations during the interview process.” The Significant Educators respectfully disagree with this statement. Mary Haynes Smith is an experienced school leader with over 20 years of leadership experience, both in successfully leading a school academically, while also managing her school budget. Ms. Haynes-Smith has never experienced any budgetary or financial problems or issues during her tenure as a school leader, and has additional financial experience (as noted on her resume in Part 1 of the application) when she managed a \$2.9 million budget as Drug Free Schools Coordinator.

During the interview process and scenario exercise, Ms. Haynes-Smith was an active and integral participant of the financial and operational discussions. Ms. Haynes-Smith identified key areas that were non-essential to the success of the school that could be cut if faced with a budget cut, and worked in collaboration with 4th Sector Solutions to ensure the proposed budget was optimal, as it built on the current budget that Ms. Haynes-Smith already successfully utilizes while operating Bethune Elementary and has a strong voice in setting each year.

Lastly, the report summarizes that “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.” The Significant Educators believes that the written application and capacity interview demonstrated that an intentional, organized, and unified team already exists between the governing board, the school leadership, and the partnership with 4th Sector Solutions. As the evaluator stated, the board includes “individuals with quality academic, legal, and fiscal credentials” and the application “defined the scope of standard governance roles, duties and responsibilities,” thus demonstrating effectiveness as a board that will provide oversight and governance. In addition, the Significant Educators has chosen to partner with 4th Sector Solutions because of their track record of experience and expertise with fiscal and operational functions, thus providing this integral oversight and responsibility for the collective team, while supporting and developing member(s) of the Bethune team to build the internal capacity to take on these functions over time. Ms. Haynes-Smith believes in distributive leadership and recognizes that partnering with 4th Sector would be in the best interest of the school during the transitional phase from being a direct run school to a quality charter school which is why she has astutely decided to utilize 4th Sector Solutions to be a part of the coordinated, cohesive team that exists within the Significant Educators’ plan for operating Bethune Elementary.

Operations

The evaluation report states “MMBE will prudently rely on 4th Sector Solutions for financial management and reporting services,” but later contradicts this statement by also stating “the school leadership team was overly reliant on 4th Sector.” As stated on page 57 of the revised application, Bethune’s leadership and 4th Sector will work collaboratively to ensure exemplary financial management of the budget before it is submitted to the Significant Educators’ board for approval:

“4th Sector finance team will meet with the school leader to review potential enrollment, staffing, and funding scenarios, and discuss any new educational program initiatives the school leader and/or school leadership team are considering. The budget model used by 4th Sector is extremely comprehensive, allowing for person by person budgeting and detailed other than personnel projections. Based on the school leadership input, along with historical accounting data, the finance team will prepare draft budgets for review by the school leader. The finance team will continue to work with the school leader on different scenarios in order to optimize spending on school priorities. The agreed upon budget will be presented to the board finance committee for review.”

Though 4th Sector will provide financial management, financial reporting and human resources administration for Bethune Elementary, ultimate financial responsibility still lies with the school leader and board, and they will operate as such.

The evaluation report also states “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” while “4th Sector Solutions described the operational functions.” Ms. Haynes-Smith intentionally employs a distributive leadership approach, and therefore purposely deferred to 4th Sector for describing the operational aspects of the start up challenges because that is the role and function of 4th Sector within their relationship with the Significant Educators; 4th Sector will be supporting these functions, and therefore was the appropriate party to speak on them – especially in the firm’s role as an extension of the Bethune staff. Furthermore, Ms. Haynes-Smith demonstrated her familiarity and knowledge of the budget and non-academic aspects of the school during the budget scenario, as Ms. Haynes-Smith proposed expense decreases in transportation, supply budgets, and other non-essential operating expenses. These not only show her understanding of the Bethune budget, but also strengthen her understanding of it as related to her comprehensive improvement plan, as none of these budget decreases would negatively impact the key components of the improvement plan – and this is intentional on her part.

Finally, the report states “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.” The Significant Educators respectfully disagree with this assessment. The board, school leaders, and 4th Sector Solutions worked collaboratively to craft and construct the narrative application, ensuring buy-in and engagement from all parties. Bethune leadership evaluated existing processes, systems, structures, and operating norms that 4th Sector currently utilizes in its existing charter school work within Louisiana, and intentionally chose to employ similar structures and processes, as they have proven successful and serve as

an exemplar for Bethune to emulate. In addition, the Bethune team spoke to the additional policies and procedures for financial management and operations that it will craft and utilize, with the support of 4th Sector, to best monitor and control these functional areas.

Finance

The evaluation reports states “the school would lack access to the necessary amount of liquidity during its first year as a charter” and that it “will run a deficit during the first year of operation.” The Significant Educators respectfully disagrees with these assertions. The Significant Educators submitted a revised budget to OPSB on October 13, 2017 addressing preliminary concerns over the organization's cash flow. While there may be a negative cash flow in 8 of the 12 months, at no point will cash on hand fall below six-figures over the course of the calendar year, with year end cash projected at \$242K without tapping a line of credit. Also with respect to liquidity, the cash flow assumes that Significant Educators will assume the summer pay obligations in July and August for the teachers who were employees of OPSB; this is a conservative assumption and it is likely that OPSB will be responsible for these expenses.

The Bethune administrative staff and the Significant Educators’ Board will be provided monthly budget versus actual reports tracking physical spend against budgeted amounts. In the event the school would face a deficit in year one, Bethune Elementary would look to cut some of the sixteen non-critical paraprofessional positions it currently has budgeted. The report states “it remained unclear if the governing board understood the issue... an indicator of the lack of financial capacity on the board and leadership team.” The Significant Educators respectfully disagrees with these statements, as the issue of liquidity and deficit within the first year is factually incorrect, which is why the board did not demonstrate knowledge of it.

Lastly, the report states “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...”. No details are provided on how or why the applicant did not convince the evaluation team of such; thus, the Significant Educators would like to simply state that they fully understand and were involved in the creation of the budget with 4th Sector. The proposed budget is built on the existing school budget, which the Bethune leaders are experts in and have been utilizing for the past decade. 4th Sector worked closely with the Bethune staff over many weeks in validating all of the staffing and non-personnel expenses in the budget.

Experienced Operator Addendum

For the concerns regarding the comprehensive improvement plan, please refer to the first section, “School,” in this response on pages 1-2.

The evaluator poses a contradiction of the state of the school when it makes the final declaration: “MMBE presents a stable and popular district school that is in the process of improving its academic performance,” when it earlier stated that “the lack of growth and

decline in academic performance of MMBE remains a concern.” The Significant Educators would like to state their confusion on how Bethune could both be a stable school that is improving, yet experiencing a lack of growth and decline in performance, and therefore disagrees with the analysis and conclusion that the school is declining. Additionally, as noted on page 11 of the application, Bethune is outperforming both the district and state with regards to percentage of students scoring Mastery or above on the LEAP, and has a higher percentage of students on or above grade level compared to the state with regards to early literacy in Kindergarten through 2nd grade, as measured by DIBELS (page 12 of the application narrative).

The Significant Educators would also like to note that, as school performance scores and associated letter grades were not yet released at the time of the application, there was no way for the decline in score or grade to be addressed or responded to as part of the application. As the Significant Educators are not allowed to introduce new information within this response, the leaders are not provided an opportunity to respond to or specifically address the evaluation team’s decision to include that information in their decision-making process.

Lastly, the Significant Educators would like to state that the progress reports from the Louisiana Department of Education have not yet been released, but would also provide additional data and context for Bethune’s performance, given Bethune’s increased enrollment over recent years and their absorption of students from schools that have been closed.