

ORLEANS PARISH SCHOOL BOARD

CHARTER SCHOOL APPLICATION RECOMMENDATION REPORT 2018

National Association of Charter School Authorizers

May 11, 2018

New Charter School Application for

Paul Laurence Dunbar Elementary

Submitted by

Choice Foundation, Inc.

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. Every student deserves 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 Spring 2018 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 2018 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 2018 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, budget, and financial readiness.

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.

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:

Choice Foundation, Inc.

Proposed School Name:

Paul Laurence Dunbar Elementary

Mission:

The mission at Choice Foundation schools is to prepare students for success in a college preparatory school in an atmosphere that challenges and supports each student to achieve his or her highest potential. Choice Foundation believes that students, regardless of their economic background, ethnicity, and individual learning needs, have the capability to be successful in their educational career and future job endeavors. "It is our passion and responsibility to provide the critical academic tools and social opportunities for students to develop their knowledge and skills to achieve their goals."

Proposed Location:

9330 Forshey Street
New Orleans, Louisiana

Enrollment Projections:

<i>Academic Year</i>	<i>Planned # Students</i>	<i>Maximum # Students</i>	<i>Grades Served</i>
2018-19	425	650	K - 8
2019-20	450	650	K - 8
2020-21	475	650	K - 8
2021-22	500	650	K - 8
2022-23	525	650	K - 8
At Capacity	N/A	N/A	K - 8

EXECUTIVE SUMMARY

Recommendation:

Paul Laurence Dunbar Elementary

DENY

Summary Analysis:

The evaluation team recommends denial of the proposal for Paul Laurence Dunbar Elementary (“Paul L. Dunbar”).

The School section approaches the standard. The primary weakness is the applicant's lack of sufficient evidence to support Choice Foundation's capacity to meet the Year 1 enrollment target of 425 students. This is significant because the school proposes to open in approximately 90 days (August 2018).

The People section approaches the standard. While the organizational chart and corresponding job descriptions include all essential responsibilities and positions necessary to implement the school's plans, the applicant's written proposal and capacity interview did not inspire confidence in Choice Foundation's capacity to execute the proposed staffing plans and strategies for the anticipated enrollment target in time for an August 2018 opening.

The Operations section approaches the standard. The applicant submitted a detailed start-up plan that contains specific tasks, individuals responsible, and timelines that are aligned with the start-up budget. However, the evaluation team does not have confidence in the applicant's capacity to execute the staffing and enrollment goals of the start-up plan in time for an August 2018 opening.

The Experienced Operator Addendum approaches the standard. Choice Foundation asserts that it will "ensure success at the new school site, as well as its existing school sites, by continuing its proven track record since 2007 of quality academic, operational, and financial management." However, specific strategies for ensuring success at Esperanza Charter School (“Esperanza”) and Lafayette Academy (“Lafayette”), while also opening a full K-8 school, are lacking in detail. The evaluation team does not have confidence that Choice Foundation has the capacity to add a new charter school in 2018 without negatively impacting performance at its existing schools.

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

Approaches the Standard

EXPERIENCED OPERATOR ADDENDUM (IF APPLICABLE)

Approaches the Standard

PEOPLE

Approaches the Standard

TRANSFORMATION ADDENDUM (IF APPLICABLE)

N/A

OPERATIONS

Approaches the Standard

SCHOOL

Paul Laurence Dunbar Elementary

RATING:

Approaches the Standard

Plan Summary:

Choice Foundation proposes a community-based school with a focus on serving the Hollygrove community. Choice Foundation and the Hollygrove community have worked together for more than a decade.

The education model is built on four pillars: 1) alignment with state standards; 2) data-driven instruction; 3) extensive student support; and 4) excellent teaching. The school's goals are to advance equity for students and families; achieve 75 percent of students in Grades 3-8 meeting or exceeding individual growth targets on the state assessments in ELA and Math by the end of Year 3; increase the diversity of school programs offered to students and families by the end of Year 2; achieve at least 75 percent of English learners meeting exit criteria to be mainstreamed into general education classrooms within four years of their entrance dates; and decrease behavioral referrals and increase student attendance.

Professional development is built into the school calendar and the school day for teachers and administrators, and is focused on understanding content standards, expanding effective strategies for diverse learners, using data, and using instructional resources to plan and deliver high-quality instruction.

Analysis:

The School section approaches the standard.

The application does not contain sufficient evidence to inspire confidence that Choice Foundation will meet its Year 1 enrollment target, which is significant given that the school proposes to open in August 2018. The documents provided do not support commitment from enough parents to indicate that Choice would meet its Year 1 enrollment target of 425 students. (Attachment 1) During the capacity interview, the applicant stated that 200 students is the minimum enrollment that would allow the school to remain financially viable.

The evaluation team is not confident that the applicant team has the evidence to recruit 425 students (or even 200 students) in the next 90 days. A Dunbar Parent Database document contains 47 names; five letters from parents state their support for the proposed school; a document entitled "Interest in Paul L. Dunbar School Survey" contains names of 22 parents who state their intent to enroll their children; and 10 Dunbar School Community Input survey forms indicate parents' desire to enroll their children (Attachment 1). The applicant proposes a school opening date of August 2018, so the lack of solid parent commitment at this point is a significant concern. The evaluation team recognizes that the Hollygrove community advocated for Paul L. Dunbar to become a community-based school. However, commitment from parents to enroll their children at the proposed school is not evident at this time.

Overall, the academic model and schedule represent a plan to improve student performance at a rate that is reasonable and ambitious, and takes into consideration the renewal and extension performance standards. Also, the applicant provides accurate estimates of baseline performance for the student population it proposes to serve.

The applicant provided a detailed English learner plan describing how it will ensure that all English learners succeed. Included in the plan are specific instructional English learner strategies that will be used to make learning accessible for all students. Finally, student experience and school culture will promote a positive, rigorous, and inclusive academic environment.

PEOPLE

Paul Laurence Dunbar Elementary

RATING:

Approaches the Standard

Plan Summary:

The governing board has members with professional expertise in law, insurance, management, development, finance, investment, banking, human resources, civic leadership, and spiritual leadership. The board also includes a parent of a current student, as well as the grandparent of a recent student.

The leadership structure within Choice Foundation schools is organized to create a small-school atmosphere, structured into divisions that will be led by full-time administrators called division heads who will report to the head of school. Each of the division heads will be responsible for day-to-day operations of about 200 students, including supervising students and supporting teachers. The head of school will report to the executive director of Choice Foundation, who reports directly to the Choice Foundation board of trustees.

The COMPASS rubric will be used to evaluate teachers. In addition to the COMPASS observation and feedback cycle, Choice Foundation provides each instructional staff member with a document, titled Choice-i-fication, which outlines knowledge and proficiency expectations for all Choice Foundation instructional staff.

Analysis:

The People section approaches the standard.

While the organizational chart and corresponding job descriptions include all essential responsibilities and positions necessary to implement the school's plans, the applicant's written proposal and capacity interview did not inspire confidence in Choice Foundation's capacity to be able to hire enough qualified staff in time for an August 2018 opening. In order to serve the proposed 425 students in Year 1, Choice Foundation may need to hire and on-board approximately 37 instructional staff members in the next 90 days, in addition to drawing staff and potentially filling positions at its current schools. The applicant acknowledges that Louisiana is experiencing a teacher shortage, especially in urban schools and in specialized areas such as Math, English as a second language, and special education.

Choice Foundation has identified a qualified school leader who has managed a school, a team of teachers, and an academic program. For the past 10 years, Darlene Charlot has worked in an urban school setting with Choice Foundation; in seven of those 10 years, she served in a leadership capacity. As a member of the school leadership team at Lafayette, the school performance score increased from 80.8 in 2016 to 83.2 in 2017. The Spring 2017 LEAP Criterion-Referenced Test showed that third-grade students at Lafayette outperformed OPSB and RSD New Orleans schools in the percentage of students achieving mastery or above in ELA, Math, and Social Studies.

The governing board exhibits the capacity to monitor the school's effectiveness. The board has articulated a set of metrics by which it would monitor and gauge the school's academic, operational, and financial effectiveness. The applicant provided a decision-making flowchart that illustrates its capacity to take appropriate action on the information it gathers and to monitor the school's effectiveness. The board described how current board members were selected and articulated a plan for increasing board capacity. However, the 16-member governing board does not include anyone with academic expertise. The governing board reviews the executive director's performance during executive session at least once per school year. The board's review is guided by a rubric that evaluates quantitative and qualitative metrics, and articulates a set of standards that the leader must satisfy in order to keep the school on track to achieve its vision.

OPERATIONS

Paul Laurence Dunbar Elementary

RATING:

Approaches the Standard

Plan Summary:

The proposed school will be located at 9330 Forshey Street. Choice Foundation has initiated the lease negotiation process with OPSB and OPSB has delivered a lease to Choice Foundation for review. Choice Foundation's facility team consists of an associate director of finance and operations, a maintenance manager, a facility coordinator, a site-based operations manager, and a site-based maintenance porter. The facility team works to ensure safe and efficient facility operations, as well as ensuring compliance with local and state requirements and codes.

The staffing section of the startup plan identifies the individuals responsible for recruiting, selecting, hiring, and on-boarding school staff. The startup plan states May 2018 as the target completion date for receiving applications and résumés and July 2018 as the target completion date for staff on-boarding tasks. The student recruitment section of the startup plan includes tasks assigned to leaders who are responsible for engaging parents and families; recruiting students; managing receipt of matches from EnrollNOLA; contacting parents to complete registration documents; and enrolling students.

The Choice Foundation business office will fulfill the financial management functions of the proposed school. The business office leadership team includes the director of finance and operations (DFO) and three associate DFOs. The DFO, in partnership with the three associate DFOs, is responsible for budget management, financial reporting, and audit preparation.

Analysis:

The Operations section approaches the standard for approval.

The applicant submitted a detailed start-up plan that contains specific tasks, individuals responsible, and timelines that are aligned with the start-up budget. However, the evaluation team does not have confidence in the applicant's capacity to complete the staffing and enrollment tasks in the start-up plan. Artifacts provided in Attachment 1 and enrollment discussions during the capacity interview did not inspire confidence that the applicant can successfully implement the student recruitment strategies and complete the student enrollment tasks identified in time for opening. During the capacity interview, instead of describing the progress they've made toward achieving the 425-student enrollment target, the applicant team instead shared their challenges as to why they do not have more commitment from parents to enroll students. With an August 2018 school opening, the applicant has not demonstrated that it is making adequate progress with the tasks it has identified in the enrollment or staffing sections of the start-up plan.

The revenue section of the budget contains inconsistencies. A letter from the Choice Foundation board chair states that the organization has allocated and approved \$300,000 in startup funding for Paul L. Dunbar. While the Startup Statement of Activities shows \$300,000 of this secured Choice Foundation funding, the Operating Statement of Activities shows \$250,000 in Year 1. The Operating Statement of Activities shows an additional \$200,000 in Year 2. However, the board chair's letter authorizes only \$300,000. It is not clear that Choice Foundation has committed to providing the additional \$200,000 for the school.

Choice Foundation's facility plan articulates a sound plan for ensuring code compliance and meeting the requirements of the educational program and anticipated student population.

Projections for expenditures in the budget are based on accurate and conservative assumptions. The proposed school will pay Choice Foundation a CMO fee of between \$700 and \$750 per student for services rendered. The cumulative fund balance reaches 10 percent of expenditures by Year 5. Choice has a qualified financial manager who will provide financial management services for the proposed school. James Fulton is Choice Foundation's director of finance operations. He has 22 years of financial management experiences and holds an undergraduate degree in accounting and a master's degree in business administration.

EXPERIENCED OPERATOR ADDENDUM (IF APPLICABLE)

Paul Laurence Dunbar Elementary

RATING:

Approaches the Standard

Plan Summary:

Choice Foundation's scale strategy focuses on the continued development of its leadership pipeline. Choice Foundation will observe staff for leadership potential and offer leadership opportunities upon identifying leadership potential. Choice Foundation views developing internal talent and promoting from within the organization as the best way to ensure that any schools/programs are developed in a manner that ensures healthy growth. The current executive director will retire in the next few years and the governing board will work with the executive director to prepare for the transition. The board is aware of internal candidates and it also intends to engage national search firms to assist.

Choice Foundation has a history of pursuing opportunities to turn around failing schools. From 2006, when the Louisiana Board of Elementary and Secondary Education (BESE) granted Choice Foundation the charter to operate Lafayette, to 2017, Lafayette's school grade increased from an "F" to a "C." The Spring 2017 LEAP Criterion-Referenced Test showed that third-grade students at Lafayette outperformed OPSB and RSD New Orleans schools in the percentage of students achieving mastery or above in ELA, Math, and Social Studies.

In the event that the proposed school is faced with a budget shortfall, the executive director, DFO, and the governing board's budget finance committee will develop a budget shortfall and action plan, which may include the use of Choice Foundation reserves (\$2,524,750 as of October 2017); deferment of large capital purchases; reduction in non-essential expenditures; and reductions in non-essential staff.

Analysis:

The Experienced Operator Addendum approaches the standard for approval.

Past school performance for Choice Foundation's schools shows mixed performance results. Given recent declines in performance at Esperanza, as well as the 2017 non-renewal of McDonough 42 Elementary Charter School, the evaluation team does not have confidence that Choice Foundation has the capacity to add a full K-8 charter school to its network in the next 90 days without negatively impacting performance at the existing schools. Esperanza's grade decreased from a "B" in 2016 to a "C" in 2017 and there was a significant decrease in Esperanza's school performance score from 89 in 2016 to 68.3 in 2017. In 2012, BESE granted a charter to Choice Foundation to operate McDonough 42. However, in 2017, upon completion of the fifth year of operation, Choice Foundation's charter contract was not renewed and BESE assigned the school to another operator. In contrast, Lafayette's student performance score increased from 80.8 in 2016 to 83.2 in 2017. Choice Foundation asserts that it will "ensure success at the new school site, as well as its existing school sites, by continuing its proven track record of quality academic, operational, and financial management." However, specific strategies—beyond pulling leaders from existing schools—do not clearly demonstrate how the school will ensure continued success while expanding the network.

Plans to transfer or promote current staff to roles at Paul L. Dunbar raise additional concerns about negatively impacting operations and performance at Choice Foundation's existing schools. In addition to staffing needs at the new school, there is the potential for additional vacancies at the existing schools. The proposal describes efforts during the 2017-18 school year to "incubate" several key administrative and instructional staff members (including the school head, assistant head of school, and two experienced instructors). The 12-month incubation period is described as "allowing for training and planning in advance of the projected school opening." However, the applicant does not describe the type of training offered, the planning activities that occur, and does not describe how this strategy leads to intended outcomes.

The scale strategy clearly defines the academic and operational functions that will be centralized at the CMO level and clearly defines which functions will remain site-based.

EVALUATOR BIOGRAPHIES

Evaluator's Name

Chakana Fowler

Ms. Fowler's 10 years of leadership in education management includes managing finance at Uncommon Schools and business development at Charter Schools USA. She also co-managed the \$23 million Florida Fund, which was a social venture capital fund created through a partnership between Charter School Growth Fund and the Florida Department of Education to support the expansion of high-performing charter schools throughout Florida. Ms. Fowler's career in education began in the classroom where she taught mathematics for two years at a South Bronx middle school as a New York City Teaching Fellow. Ms. Fowler's professional background also includes her work in investment banking; she was an Analyst at Morgan Stanley and an Associate at JPMorgan. Ms. Fowler has a Bachelor's in Accounting from the University of Miami. She attended graduate school at City College of New York, where she earned an Ed. M in Mathematics Education and at Columbia Business School, where she earned an MBA.

Evaluator's Name

Steve Robbins

Steve Robbins is an independent education consultant focused on school operations and finance. He received his Master's of Education from Harvard University with a focus on education policy and data science. Prior to earning his Master's degree, he was a founding member of Wolcott School, a high school in Chicago for students with learning differences, as their first ever Director of Finance and Operations. Previously he worked in New York City as both a corporate finance advisor and a hedge fund analyst for eight years.

Evaluator's Name

Dr. Lisa Green-Derry

Dr. Lisa Green-Derry is an education strategist who knows that all children have assets and believes that expanding the definition of assets can influence ways in which professionals interact with children and ultimately produce positive outcomes. Dr. Lisa's expertise in student-centered instruction and assessment, implementation and evaluation of Science, Technology, Engineering, and Mathematics (STEM) curricula, designing and facilitating culturally responsive modules for pre-service teachers, and educators in K-12 systems, graduate students, as well as faculty of social work programs has for more than 20 years influenced educational outcomes for students in urban and rural educational settings. Dr. Lisa's integrative approach to education connects assets of families and children to various systems in ways to provide opportunities that support equitable education for all children.