Unification Advisory Committee:
September Quarterly Milestone Update

September 6, 2017
Agenda for today

1. Vision & District Strategic Plan
2. Unification Milestone Update
3. Facilities Siting
4. Charter School Accountability Framework
One year into the unification process, we’ve made a lot of progress and are ready to engage in the remaining work of unification.

### Community Engagement
- Engaged over 5,000 community members and students
- Hosted 10+ Town Halls and community meetings
- Convened 4 Task Forces with over 100 participants
- Conducted two citywide surveys

### Significant Accomplishments
- Created Common Charter Contract
- Established Operator Enrollment Cap and Differentiated Funding formula
- Created Facilities Maintenance and Repair standards and Handbook
- Updated Facilities Lease
Vision and District Strategic Plan
Where we are in the vision and strategic goal setting process

<table>
<thead>
<tr>
<th>January-May</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Board working session to discuss potential mission and vision for OPSB</td>
<td>• Board considered input from students and the community</td>
<td>• Meetings with school leaders, Board Chairs, parents, community organizations, and the broader community</td>
<td>• Administration drafted initial vision and strategic priorities document based on the feedback received in the previous 6 months</td>
<td>• Town Halls with the community</td>
<td>• Final approval by the Board</td>
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<td>• OPSB convened Superintendent’s Student Advisory Committee and launched the Community Education Survey</td>
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We will discuss our proposed stakeholder engagement process for getting from today’s session to a final public document later in this meeting.
We have sought to create multiple opportunities to hear from our community.

**Parent & Community Voice**
- 3,800+ New Orleanians responded to citywide survey on public education. Survey was heavily advertised online and available in paper form at various locations.
- Meetings with education and community leaders and elders.
- Focus groups with diverse array of New Orleans teachers, parents and residents.

**Student Voice**
- Superintendent’s Student Advisory Committee – new group of students from all over the city convened for small group conversations with Superintendent.
- New Orleans Student Survey – 750+ respondents.

**Elected School Board**
- November Work Session
- January Board Retreat
- May Board Working Session
- August Board Working Session
At our Board retreat, we discussed the following elements in shaping a five- to ten-year vision for public education in our city.

- **Adequate and Equitable Resources**
- **Community & Collaboration**
- **Inclusive of the Whole City**
- **Choice & Autonomy**
- **Public Education as a Vehicle for the City’s Progress**

- “Overall, our public education can be the foundation for our students to successfully enter the next stages of their lives, whether that is pursuing higher education or the workforce.”

- “Schools are more future-focused, which benefits students as they prepare to compete nationally and internationally.”
For the City’s Education Community

- Unity
- Talent
- Expanding services and supports
- Improving school quality
- Increasing investment

For District Leadership

- **Community engagement**: Inclusive decision-making, building broad support for public education
- **Accountability and effective regulation**: Clear and consistent expectations and enforcement, especially for students with unique needs
- **Resourcing**: Both maximizing existing resources and marshaling new funds
The Superintendent’s Student Advisory Committee believes that every public school student should experience the highest quality education in inclusive and empowering schools throughout the city. These experiences should include:

- **A Rigorous and Diverse Academic Experience**
- **Robust Extracurricular Opportunities**
- **Comprehensive Student Support Services**
- **Fair and Firm School Culture and Discipline**
- **Authentic Platforms for Student Voice and Representation**
Public Schools in New Orleans must ensure that we have access to the highest quality teachers who personalize instruction and create rigorous learning environments and give us access to a variety of curricular options to support our passions and futures.

Public Schools in New Orleans should offer rich and varied extracurricular activities and opportunities that appeal to all of us, including sports, clubs, internships, service learning activities, and trips.

Every school must provide a support system for all of us, with caring and available staff members and updated resources to help ensure our social, emotional and physical needs are fully met. Above all else, we believe that every adult in our schools should care about the whole child, not just academic achievement.

Public schools in New Orleans should create a firm and respectful school culture that is most conducive to learning, while simultaneously allowing us to feel accepted, engaged and free to express ourselves as young people.

Our schools, and the district as a whole, must strive to include our voices, collectively and individually, in school affairs, academic choices, and school culture. We believe our voices should be at the center of key conversations about our city’s public schools.
Building A Vision
Key Findings from the Citywide Survey on Public Education

The availability of high quality school options
- Most believe in the value of the choice system that New Orleans has adopted
- But many also feel dissatisfied with the choices they have, and want to see high quality schools in every neighborhood

Defining appropriate expectations for schools
- The community wants to see schools setting higher expectations for students
- But those higher expectations should reflect a broad set of skills and capabilities that prepare students for their futures

Access to diverse schools
- There is significant room for improvement in creating schools that are socio-economically and racially diverse, to which parents from all backgrounds want to send their students
In the new and unique public school system we are building, families and community members need to know what they can expect from the district. We are focused on five key questions that help shape public education in the city:

- **As a regulator of schools, which schools are allowed to open, and which need to be closed?** - School Oversight and Planning
- **How do families and community members have a voice in decisions regarding public education?** - Community Affairs
- **How do students and families enroll in schools and access the services they need?** - Equity and Student Support
- **How do we invest to preserve and improve our school facilities?** - Facilities
- **How do we fund our schools and other citywide educational programs?** - Finance and Administration
Building A Vision: Citywide Survey
Additional implications for vision and priorities

- The vision that we articulate needs to be student-centered and focused on the success of the whole child. Academic achievement is critical, but can feel narrowly defined.

- Our strategic priorities for 2018 and beyond need to be simple and clear, so that the priorities themselves help the community understand our role and where families can expect from us.

- The community input suggests some potential areas of focus as we develop our strategic priorities:
  - **High Quality Schools**: families clearly feel that they need more high-quality options, with a greater focus on equity in under-served neighborhoods.
  - **School Accountability**: the community wants schools that embrace a broad definition of student success, and supports a growth-oriented approach to measuring results.
  - **School diversity**: individuals throughout the city want access to diverse schools where more families from across the city are comfortable sending their students.
  - **School Facilities**: community members are proud of the investments that have been made in school facilities. We need to preserve and build on this progress so that all children are educated in a 21st century school.
Our Response:
Draft Vision & District Strategic Plan
Framework for our Vision & Strategic Plan

- Elements presented to Unification Advisory Committee members today
  - A Vision for Students
  - Our Core Commitments, to guide our district’s work on behalf of students and families
  - A detailed set of District Responsibilities, including district areas of focus, opportunities for partnership and community voice, and proposed progress measures

- Elements to be presented to the School Board once framework is adopted
  - Annual district action plan and metrics, aligned to the three year Strategic Priorities
  - New School Development Priorities (formerly Charter Authorizer Priorities), to be presented to the Board in the fall as part of the Authorizing Approach milestone required by the Unification Plan
  - Charter School Authorizing Framework (formerly School Performance Framework), to be presented to the Board in Fall 2017 as required by the Unification Plan

- The Vision and Strategic Plan elements presented here are in draft form and will continue to be modified based on feedback from the board, UAC and community.
What OPSB heard from our community - vision & commitments

**Draft Vision Based on Community Feedback:**
Every student receives a high-quality education that fosters his or her individual capabilities, while ensuring that they thrive and are prepared for civic, social, and economic success.

**Draft Commitments Based on Community Feedback:**

<table>
<thead>
<tr>
<th>We advance equity</th>
<th>We protect choice for families</th>
<th>We elevate student and community voice</th>
<th>We are transparent and efficient</th>
<th>We create opportunities for students to thrive</th>
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<tbody>
<tr>
<td>for students and families, by viewing all decisions that we make through the lens of advancing opportunity and access for each child based on his or her unique abilities</td>
<td>who know their children best by providing information so that they are able to make informed decisions, and by ensuring that there are high quality school options to choose from in every community in the city</td>
<td>so that our work is informed by the needs and desires of those who are most directly affected by our public schools; including parents, families, and other voices in our community</td>
<td>to deepen confidence among the public at large that resources for public education are being used wisely to serve children and to reduce the administrative burden on our school</td>
<td>reflecting the District’s role as critical, but limited. We will work to see students succeed especially to realize high student achievement in our schools</td>
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Our District Responsibilities

We believe that it is the district office’s responsibility to enable high-quality life outcomes for all students in New Orleans, by serving as a strong and responsible regulator of schools and a responsible steward of public resources.

**We promote equity and fairness for students and families**
- by providing and advocating for a range of services and programs for some of New Orleans’ most vulnerable students

**We hold schools accountable to high standards for student achievement**
- through a rigorous school performance framework, ongoing performance oversight aligned to standards, and regular contractual review and renewal decisions

**We provide families with a choice of high quality schools**
- by operating EnrollNOLA fairly and transparently, conducting a robust new school development process, and curating schools that are representative of our community

**We are a responsible steward of public resources**
- by being transparent about how funds are used, preserving and improving our school facilities, and maintaining strong financial oversight
From the wisdom imparted by thousands of teachers, students and New Orleanians, we’ve developed these ideas of a consensus and inclusive vision for OPSB. But the work is not yet done. We need more feedback.

To this end, the OPSB will host a series of town halls throughout the city:

- Wednesday, August 23 at Alice Harte
- Thursday, August 24 at KIPP Central City Academy
- Thursday, August 31 at Lake Forest Charter School
- Thursday, September 7 at McDonogh 35 Senior High School

Based on additional feedback, a revised version of vision will be presented to the School Board. Additional implementation details will be in the strategic plan framework that accompanies vision.

The adopted vision and strategic plan framework will serve as the foundation for additional work through the Fall, including:

- Approach to Authorizing Schools and New School Development Priorities
- Charter School Accountability Framework
- 2017-18 School Year District Action Plan
Unification Update: Milestones
### September Milestone Progress

**We are on track to meet all September Unification Milestones**

<table>
<thead>
<tr>
<th>Area</th>
<th>Milestone</th>
<th>Milestone Deliverables</th>
<th>Status</th>
<th>Complete</th>
<th>On Track</th>
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<tbody>
<tr>
<td><strong>Portfolio</strong></td>
<td>Develop the School Performance Framework</td>
<td>• Updated School Performance Framework</td>
<td>• OPSB continues to engage in several stakeholder conversations and will continue making revisions as necessary</td>
<td></td>
<td>✓</td>
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<td></td>
<td>Update the School Performance Framework to incorporate the state's adjustment to ESSA</td>
<td></td>
<td>• State ESSA plan has been adopted and alignment with CSAF is ongoing</td>
<td></td>
<td>✓</td>
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<td><strong>Citywide Services and Enrollment</strong></td>
<td>Clarify the future status of the New Orleans Therapeutic Day Program (NOTDP) within the New Orleans Community</td>
<td>• Process document for NOTDP transition plan</td>
<td>• NOTDP planning on becoming a nonprofit organization prior to July 1, 2018</td>
<td></td>
<td>✓</td>
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</table>
| **Facilities**             | Refine existing policy around the sale and access to surplus or vacant buildings and ensure alignment with the portfolio management process. | • OPSB Policy • Process Document                                                        | • Facility policies FE, HD, and FJ were approved at the March Board meeting
<pre><code>                                                                              |                                                                                         | • Siting process will launch by end of August                                               |          | ✓        |
</code></pre>
<p>| <strong>Finance and Operations</strong> | Develop a plan and mechanisms to ensure financial viability for both OPSB and RSD during the transition period leading to unification. | • Letters of Confirmation and approved 2018 budgets from OPSB and RSD                  | • OPSB and RSD’s FY18 budgets have been approved                                           |          | ✓        |</p>
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<th>Milestone</th>
<th>Status</th>
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<tr>
<td>Citywide Services and Enrollment</td>
<td>Identify which citywide services and resources will be funded within the expected revenues for the unified school district.</td>
<td>• FY18 Budget outlines all services that will be funded by the unified school district</td>
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<td>Determine the role of OPSB as a partner to non-profits that play critical roles in supporting citywide services.</td>
<td>• OPSB’s Equity and Student Services team are creating a process document for managing critical non-profit relationships</td>
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<td>Portfolio Management</td>
<td>Ensure that facility and enrollment policies and processes are aligned with the portfolio management process.</td>
<td>• OPSB’s has convened a School Leader group to discuss and provide feedback on a draft Authorizing Approach</td>
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<td>Finalized School Performance Framework and associated accountability processes will be aligned with all existing OPSB charter policies regarding student equity, emergency management, enrollment, and school authorization</td>
<td>• Stakeholders are providing feedback on policies associated with CSAF</td>
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<tr>
<td>Facilities</td>
<td>Develop policies and processes to secure property insurance that meet insuring standards for adequate coverage.</td>
<td>• Insurance rates have been locked in through the 2018-19 school year.</td>
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<td>Plan for the development of the revolving facility loan fund and individual school facility accounts.</td>
<td>• Weekly OPSB/RSD meetings are being held to create a plan and process for establishing a revolving facility loan fund and individual school accounts</td>
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<td></td>
<td>Develop and implement standards and policies for capital repairs and replacements funded through the School Facility Preservation Program.</td>
<td>• Facilities policies HD, FE, FJ work in concert to provide operators with transparency on the process for capital repairs and replacements</td>
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Adjusted December Milestone

Based on feedback from stakeholders and a change in the timeline for facilities master planning, we have made a change to an upcoming facilities milestones

School Facility Preservation Program related Policies

- Facilities Master Planning will also impact the planning process for the Facilities Preservation Fund; in order to allow for ample time for additional school facility assessments, the incorporation of 10/1/17 student data and input from relevant stakeholders, OPSB will make this a March 2018 Milestone
Facilities Assignment Process
Facilities Siting – Increased Transparency

- Our responsibility is to give schools and the community a transparent process for facility siting decisions

- Overview:
  - OPSB will carry out a bi-annual facility siting process in August and January
  - Available facilities listed based upon combination of facility condition and city needs
  - Two types of leases will be available for buildings depending on building condition
  - Facilities not claimed may be considered for surplus
  - Request for a facility does not guarantee placement at such facility
Facilities Siting – Who can apply? Who can’t?

- No simultaneous awards of charters and facilities. Must have an approved charter to apply during the fall cycle.
  - Type 1 applicants – Cannot apply this cycle
  - Transformation applicants – Cannot apply this cycle

- Majority of facility space must be used for the explicit purpose of educating students

- Schools currently housed in a facility but looking to move to a different facility
The first round of facility siting process will begin in August.

<table>
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<tr>
<th>Timeline</th>
<th>Action</th>
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</table>
| **1** August 31, 2017 | - Publish list of available properties on OPSB website and notify RSD and OPSB operators  
                        |   - Include assessment data, drawings, capacity information, and known issues  
                        |   - Decision criteria released                                                                                                       |
| **2** September       | - Open house visits for all facilities available through the fall process                                                            |
| **3** October 13, 2017| - Applications due along with prioritized rankings of sites if multiple sites are selected                                           |
| **4** October 31, 2017| - Siting team to share recommendations with executive team  
                        |   - Executive team discusses and approves final siting decisions  
                        |   - Schools notified of final decisions                                                                                             |

Operators awarded buildings in October of 2017 will receive a lease that commences July 1, 2018.
The second round of facility siting decisions will begin in January

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<tr>
<th>Timeline</th>
<th>Action</th>
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| January 12, 2018 | • Publish list of available properties on OPSB website and notify RSD and OPSB operators  
|               | • Include assessment data, drawings, capacity information, and known issues  
|               | • Decision criteria released                                          |
| February      | • Open house visits for all facilities available through the spring process |
| March 2, 2018 | • Applications due along with prioritized rankings of sites if multiple sites are selected |
| March 15, 2018 | • Siting team to share recommendations with executive team  
|               | • Executive team discusses and approves final siting decisions  
|               | • Schools notified of final decisions                               |

Operators awarded buildings in March of 2018 will receive a lease that commences July 1, 2018
## Facility Siting - Criteria

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<tr>
<th>Criteria</th>
<th>Scoring</th>
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| **Community Support – 30%**    | • Evaluated based on letters of support from neighborhood organizations, businesses, and neighbors  
                                 | • Examples of community outreach exhibited by the school will also be considered  
                                 | • Tiered ranking system (0, 10, 20, 30)                                                                                             |
| **Commitment to Improvements – 30%** | • Any stated commitments to repair the specific facility will be considered and evaluated  
                                  | • Tiered ranking system (0, 10, 20, 30)                                                                                             |
| **Utilization – 20%**          | • Current enrollment and future enrollment vs. program capacity will be considered and evaluated  
                                 | • Tiered ranking system (0, 10, 20)                                                                                                 |
| **Strategic Priority – 20%**   | • Strategic priority of academic program shall be considered and evaluated  
                                 | • (0 - 20)                                                                                                                           |
# Facilities Assignment Rubric

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Scoring</th>
<th>Examples</th>
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</thead>
<tbody>
<tr>
<td>Community Support</td>
<td>0</td>
<td>No evidence of engagement with neighborhood organizations, businesses, and neighbors.</td>
</tr>
<tr>
<td></td>
<td>10</td>
<td>Evidence of minimal engagement with neighborhood organizations, business, and neighbors.</td>
</tr>
<tr>
<td></td>
<td>20</td>
<td>Evidence of substantial engagement with neighborhood organizations, businesses and neighbors.</td>
</tr>
<tr>
<td></td>
<td>30</td>
<td>Documented support from multiple stakeholders including neighborhood organizations, businesses, and neighbors.</td>
</tr>
<tr>
<td>Commitments to Improvements</td>
<td>0</td>
<td>No evidence of commitment to improve the facility.</td>
</tr>
<tr>
<td></td>
<td>10</td>
<td>Commitment to minimal facilities improvements. Commitments primarily aesthetic in nature. Application may or may not have shared proof of funding plans to support improvements.</td>
</tr>
<tr>
<td></td>
<td>20</td>
<td>Commitment to substantial aesthetic improvements and/or minimal structural improvements with a realistic funding plan.</td>
</tr>
<tr>
<td></td>
<td>30</td>
<td>Fully developed plan for substantial structural and aesthetic upgrades along with a realistic funding plan.</td>
</tr>
<tr>
<td>Utilization</td>
<td>0</td>
<td>Realistic full enrollment projections of less than 50% of building capacity.</td>
</tr>
<tr>
<td></td>
<td>10</td>
<td>Realistic full enrollment projections between 50% and 75% of building capacity.</td>
</tr>
<tr>
<td></td>
<td>20</td>
<td>Realistic full enrollment projections between 75% and 100% of building capacity.</td>
</tr>
<tr>
<td>Strategic Priority Alignment</td>
<td>0-20</td>
<td>Scoring based upon how well the proposed academic program aligns with administrative priorities.</td>
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Two types of leases based on property assessment data

- FCI = Facility Condition index (Cost to repair/Cost to build new)
  - The higher the FCI, the worse shape the building is in

- Type A leases will be aligned to charter term with the maximum lease expiring June 30, 2021.

- Type B leases will allow for extended lease terms to be negotiated with OPSB upon assignment to allow for private investment.

- Type B leases place full liability for repairs and maintenance on the operator.
  - OPSB will not invest any money in Type B facilities
  - Operators will be fully liable for Repairs, Maintenance, and Capital investment

<table>
<thead>
<tr>
<th>Year Available for Surplus Process</th>
<th>Facility</th>
<th>FCI</th>
<th>Investment Type</th>
<th>Lease Type</th>
<th>Program Capacity</th>
<th>SY17-18 Operator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall Process - July 1, 2018 Lease</td>
<td>Rosenwald</td>
<td>47.61%</td>
<td>Prior Refurbishment</td>
<td>Type A - Current Lease</td>
<td>628</td>
<td>Vacant</td>
</tr>
<tr>
<td></td>
<td>AP Tureaud</td>
<td>65.48%</td>
<td>None - Landbanked</td>
<td>Type B - Full Liability</td>
<td>278</td>
<td>Vacant</td>
</tr>
<tr>
<td></td>
<td>Gentilly Terrace</td>
<td>56.21%</td>
<td>Prior Refurbishment</td>
<td>Type B - Full Liability</td>
<td>414</td>
<td>Vacant</td>
</tr>
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Charter School Accountability Framework
In this presentation, we seek to:

- Provide an overview of the context and expectations OPSB has been charged with in revising its current accountability framework.

- Share the objectives of the Draft Charter School Accountability Framework (CSAF) and OPSB’s commitments to schools and the community at large.

- Explain the process OPSB has undertaken to revise the framework, specifically:
  - The stakeholder groups who have been engaged.
  - The steps which have been taken to draft and revise CSAF components over time.

- Highlight elements of the draft CSAF which are still under significant deliberation and highlight the work that remains for OPSB to finalize the policy recommendations.
The Unification plan called for OPSB to revisit and revise its approach to school accountability.

As part of Act 91, passed in May 2016, and the Unification Plan, approved in August 2016, OPSB is required to revise its School Performance Framework in advance of Unification.

- OPSB will present a new school performance framework and associated policies, which reflect the discussion and debate of stakeholders along with state-mandated ESSA obligations.

Revising the accountability approach, per Act 91 requires OPSB to:
- Navigate both OPSB’s and RSD’s past and proposed accountability frameworks as well as the gaps between those frameworks.
  - Policy HAB, HB and HC along with the “School Performance Framework” in OPSB
  - BESE Bulletin 126 and the Charter School Performance Compact (CSPC) in the RSD
  - Emerging revisions to the CSPC
- Consider the skill and capacity of its internal team to execute the work with fidelity, given allotted resources.
- Consider the potential future impact of an evolving state accountability system.
OPSB has worked most closely with the Accountability and Authorization Task Force but has also sought out and engaged with other groups formally as well.

**Accountability and Authorization Task Force**
- Mix of school leaders, community advocates, and advocacy organizations
- Regular attendees include:
  - School and CMO leaders
  - Family, children, and community advocates (e.g., Stand for Children, LCCR, SPLC, Ed Navigator, Nuestra Voz, OPEN, TCA, etc.)
  - Policy and citywide partner organizations (e.g., Cowen Institute, NSNO)
- Have held 18 meetings over the course of the past 10 months
- Meetings have followed a specific scope and sequence initiated in late October
- All school leaders citywide were invited to formally participate (or send a representative) to the Task Force last fall

**Current New Orleans Charter School Parents**
- Hosted two focus groups with New Orleans parents thus far
- Focus groups centered on:
  - How families defined a high-quality school
  - What types of topics OPSB should prioritize in our oversight

**Various Citywide Advocacy Organizations**
- Presented and gathered feedback from citywide organizations who invited OPSB to engage with membership
- Organizations include:
  - *Equity in All Places*: A coalition of community organizations working to end the School to Prison Pipeline
  - *One NOLA*: An organization comprised of current New Orleans Charter School teachers

**School Leader Policy Workshops**
- Formal updates provided at Unification meetings
- This spring and summer, OPSB offered a series of policy workshops specifically for school leaders to review and provide feedback on draft proposals
- Drafts of the CSAF have been distributed directly to citywide school leaders
In order to produce a first draft of the CSAF, OPSB had to reconcile significantly divergent perspectives from across and within school leader, community, parent, educational organizations and advocate groups.

A school’s letter grade doesn’t matter to me.

I don’t want to send my children to a C or D school. Why don’t we have more A and B schools?

Just keep the accountability system simple and based on measureable outcomes that already exist.

OPSB shouldn’t just look at test scores when measuring school quality.

Even though the school is a D, some families like that school and it shouldn’t be closed.

OPSB should consider the school’s mission; OPSB should hold schools accountable for educating the whole child.

OPSB should just set the standard and step back.

OPSB shouldn’t give schools any feedback about instructional quality.

What is OPSB going to do to help schools? Shouldn’t OPSB support the schools to get better?

OPSB should require schools develop a plan to improve academically and make sure they follow-through.

Student and parent surveys should be mandated and included the accountability system.

Student and parent surveys present too many unknowns and overly burdensome processes for schools.
In order to produce a first draft of the CSAF, OPSB had to reconcile significantly divergent perspectives from across and within school leader, community, parent, educational organizations and advocate groups.

- Charter schools shouldn’t be experimenting with kids.
- Schools need room for innovation and can’t have high stakes accountability looming all of the time.
- Schools need longer charter terms as an incentive to improve, and longer terms will result in better teacher retention and financial planning.
- Charter term lengths should be shorter, especially because performance fluctuates.
- OPSB should just hold schools accountable during their term, albeit with reducing or revoking their charter if they are not performing up to academic standards.
- OPSB needs to act on low performing schools, not just at renewal but during the charter term.
- OPSB needs to act on poor performing schools. OPSB needs to close D and F schools.
- OPSB shouldn’t close D schools, especially those who are helping kids the most.
- If a charter school drops significantly in performance at renewal, all of the schools in that CMO should be reviewed and reconsidered.
- School performance will fluctuate – you need to give a schools a chance to rebound before intervening.

In order to produce a first draft of the CSAF, OPSB had to reconcile significantly divergent perspectives from across and within school leader, community, parent, educational organizations and advocate groups.
The state’s new accountability system includes new additions that are vital to our local planning for accountability.

**Heightened Standards**
- For SPS calculations, on state tests, Mastery will be scored at the same level that Basic was historically scored, and Basic will be scored at a lower level.
- With these new standards, Louisiana will transition Mastery to becoming the new Basic from now through 2025.

**Inclusion of a Growth Measure in SPS Calculations**
- Student-by-student academic performance growth at a school will be included as a measure in the school’s SPS.
- As a result, the SPS and school’s letter grade will hold schools accountable to student progress as well as overall performance.

**Intervention in the Form of Academic Improvement Plans**
- Schools that have student subgroups perform at a level equivalent to a D or F letter grade over multiple years may be labeled with “Urgent Intervention Needed”, “Urgent Intervention Required”, or “Comprehensive Intervention Required” by the state.
- Such labels can result in additional funding or the need for schools to submit consolidated plans to improve performance.
One of the OPSB’s core responsibilities, as a charter school authorizer, is to hold charter schools accountable to a set of expectations designed to ensure every student and family has access to a high-quality public school.

The Charter School Accountability Framework (CSAF) outlines what those expectations are and summarizes how OPSB holds schools accountable to them at the point of charter renewal and annually.

Clearly articulate a set of rigorous, fair, and transparent standards for charter schools that are aligned to excellence and equity and that incentivize and reward continued progress towards outcomes that best serve students;

Establish systems to monitor school performance that can be implemented with fidelity and do not place undue burdens on schools; intervene when necessary; and make data-driven renewal and extension decisions that are implemented with transparency, consistency, and fidelity;

Share how well schools perform against the standards that OPSB tracks and evaluates, in a clear and timely fashion, in order to support schools in their continuous improvement; and

Provide families with easily accessible information to inform school choice decisions and increase their knowledge of each school’s performance.
To build and implement an effective accountability system, OPSB has identified several commitments to guide its work. Specifically, OPSB is committed to:

- Assessing school performance across a comprehensive set of expectations that OPSB can monitor with fidelity and that do not result in unnecessary and burdensome reporting requirements for schools;

- Ensuring that our expectations for charter schools are equitable and can be consistently applied to all schools;

- Sharing information on school performance in a transparent and comprehensible manner for all relevant stakeholders – including charter school board members, school leaders, students and families, and the public at large;

- Respecting charter school autonomy in areas identified in partnership with charter school leaders; and

- Continuously improving the standards and processes utilized to evaluate school performance.
Evolution of Revised Framework
The scope and sequence identified four stages of development, each with its own set of specific objectives, and was responsive to simultaneous work underway at the state level to revise accountability standards.

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The state presented its ESSA proposal in April, which was recently approved by the Federal government.
Planning Phase Activities and Outcomes (Oct- Nov)

Planning Phase Primary Questions

- How should we sequence our decision-making in light of state work on ESSA?
- What are our shared values when developing performance standards and systems of oversight?
- How are the OPSB and RSD frameworks similar and different? And what are the strengths and weaknesses under both systems currently?
- What can we learn from other systems and models?

Primary Activities

- Discuss qualities that define a great school and how we can/should go about measuring such quality
- Review current OPSB and RSD accountability policies and tools to see similarities and differences and identify priorities for revisions
- Review other accountability systems across the country

Key Takeaways/Deliverables

- Maintain overall approach to categories evaluated currently by both OPSB and RSD – Financial, Organizational and Academic
- Include and reward academic growth
- Consider and explore other measures that help assess school quality, beyond just test scores
- Simplify OPSB’s tools to measure only the most vital standards, and ensure they are transparent and comprehensible
- Consider a more holistic assessment of school performance at the point of renewal, beyond just one year of testing data
Cycle 1 Activities and Outcomes (Dec-February)

**Cycle 1 Key Questions**
- What are the financial performance measures and associated rating processes for those measures (i.e. targets related to meeting the District’s standards)?
- What are the organizational performance measures and the associated rating processes for those measures (i.e. targets related to meeting the district’s standards)?

**Primary Activities**
- Identify which financial measures are essential and set appropriate targets informed by charter CFO perspectives from across the city.
- Identify which organizational measures are most relevant and can be monitored in specific, efficient, and non-burdensome ways at the school level.

**Major Outcomes (in February)**
- Draft measures and method for evaluating Financial health (reduction from 9 to 6 measures):
  - Current Ratio
  - Cash on Hand
  - Enrollment Variance
  - Default
  - Unrestricted Net Assets
  - Unqualified Audit
- Draft measures and method for evaluating organizational effectiveness (reduction from 20 to 17 specific sub-measures, and increase in focus):
  - School Governance
  - Administrative Expectations
  - Family Communications
  - Student Enrollment and Privacy Practices
  - Special Populations
  - Data Integrity
  - Facility Maintenance and Safety
Continued feedback, reflection and work has resulted in further revisions to the organizational and financial measures and methods, as represented in the current draft CSAF dated 8.21.17.

Financial Expectations

- Further revisions to financial measures have resulted in a reduction by two to increase coherence and reduce duplicity in measures.
  - Current Ratio
  - Cash on Hand
  - Enrollment Variance
  - Default
  - Unrestricted Net Assets
  - Unqualified Audit

- Recent Feedback: Consider replacing Cash on Hand with Current Ratio

Organizational Expectations

- Refined organizational categories to improve clarity and reduce redundancy.
  - School Governance
  - Administrative Expectations
  - Family Communications
  - Student Enrollment and Privacy Discipline Practices
  - Special Populations
  - Data Integrity (moved to Admin. Expectations)
  - Facility Maintenance and Safety

Overall Monitoring Process

- Revised method to focus compliance monitoring on real-time response and oversight and eliminated any summative/cumulative rating on an annual basis, where schools are penalized long after issues have been remedied.

- Schools are consistently in a state of Good Standing or Not in Good Standing, and will be notified through system of compliance notifications.

- Notifications include time-bound steps to remedy non-compliance, which OPSB will monitor. Such steps may include formal Corrective Action Plans.

- In line with current policy, any severe non-compliance may lead to immediate revocation if deemed appropriate.
Cycle 2 Activities and Outcomes (March - July)

**Cycle 2 Key Questions**
- What academic and other measures should be tracked and evaluated over time?
- What level of performance will be required to gain renewal and for how long?
- How will alternative schools be evaluated at the point of renewal?

**Primary Activities**
- Develop academic standards to hold schools accountable to, annually and at the point of renewal
- Determine priorities for alternative school renewal standards
- Identify renewal policy priorities and standards for eligibility and term lengths

**Key Deliverables**
- Guidance on Organizational Expectations
  - School leaders requested clarity on what type of compliance concerns would lead to Level 1 or Level 2 notices, so additional guidance was developed; version 1.0 distributed in May; version 2.0 distributed in August
- Version 1.0 of the CSAF released 5.30.17, with focus on annual oversight activities
- Version 2.0 of CSAF released 6.19.17, with adjustments based upon feedback on Version 1.0 and with the inclusion of initial renewal recommendations, in light of ESSA:
  - Revised set of school profile topics
  - Standards for renewal
  - Specifics on annual oversight activities
As a result of stakeholder feedback, OPSB established priorities as it revised the OPSB School Performance Framework and developed versions 1.0 and 2.0 of the CSAF.

### Renewal and Extension

- **Rely on multiples years of school performance**, as one data point is insufficient to the charge at hand
- **Reward and incentivize schools helping students make meaningful growth**, year in and year out
- **Reconsider term lengths and rationale for schools to receive additional years**

### Annual Oversight

- **Broaden definition of school success** by annually reviewing a more comprehensive data set on school performance
- **Ensure** that while broadening our definition of school success, **we do not contradict or compete with state SPSs**
- **Clearly communicate how schools are performing annually across factors** that can more readily inform differentiated oversight, school reflection and parent choice
- **Ensure measures focus on outputs**, and are rigorous, reliable, and can be implemented with relative ease and/or no significant cost to schools
The initial renewal proposal are intended to ensure OPSB can responsibly oversee a citywide system of charter schools with consistency and fidelity while allowing schools the opportunity to show their impact in a stable and fair way.

Renewal and Extension

- Determine if, and for how long, a charter school operator should be allowed to continue to operate a school, based upon past performance
  - Rely on multiples years of school performance, as one data point is insufficient to the charge at hand
    - Leading the initial proposal to rely on a multi-year weighted average of SPS and a Progress Index, which reflects multiple years
  - Reward and incentivize schools helping students make meaningful growth, year in and year out
    - Leading the initial proposal to renew D schools that are having a significant and positive impact on student growth, as evidenced through the school’s Progress Index
  - Reconsider term lengths and rationale for schools to receive additional years
    - Leading the initial proposal to simplify and standardize renewal term lengths based upon absolute level of performance of C or higher for 5 years and D with high growth for 3 years
    - Leading the initial proposal to set maximum term length at five years with only option to loose years, not gain them for organizational or financial compliance
The school quality profile is a tool intended to address various stakeholder perspectives and local priorities and share information on school quality in a transparent manner.

### Annual School Performance Profile

- Ensure OPSB has a sound, current understanding of school performance based upon a pre-determined set of criteria
- Offer schools timely information to drive their own reflection and planning
- Provide families with current information on school performance to inform school choice decisions.

- Broaden our definition of school success by annually reviewing a more comprehensive data set on school performance
  - Leading the initial profile to focus on academic progress readiness, equity impact and school environment.

- Ensure that while broadening our definition of school success, we do not contradict or compete with state SPSs
  - Leading the initial profile to refrain from creating another summative rating of school quality that would be confused with the state’s accountability system.

- Clearly delineate how schools are performing annually across factors that can more readily inform differentiated oversight, school reflection, and parent choice
  - Leading the initial profile to emphasize comparing school-level outcomes with citywide averages on a percentile basis, wherever it makes sense to do so

- Ensure measures focus on outputs, and are rigorous, reliable, and can be implemented with relative ease and/or no significant cost to schools
  - Leading the initial profile to emphasize the use of existing measures and focus on measures best suited to capture a range of school performance outcomes in the most efficient and effective ways
Feedback received after Version 2.0 of the CSAF identified specific areas for continued conversation and revision that grounded our Cycle 3 meetings.

| Annual Oversight                                                                 | Feedback indicated that the draft CSAF required specificity to clarify annual oversight process (i.e. what will be expected of schools during annual oversight activities and how OPSB will execute these activities).  
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<th>E.g., What does “differentiated oversight” mean within the CSAF, will any corrective action plans be required, etc.</th>
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| Annual Reporting                                                                 | Overall feedback was positive re the new approach of reviewing a more robust set of information beyond just the SPS score.  
  |                                                                 | Outstanding: How will the district approach making citywide comparisons (e.g., Should selective-admissions schools be included with non-selective admission schools? How will the comparisons be displayed within annual reviews?). |
| Renewal Term Lengths                                                             | Overall feedback on proposed term length approach varied: Some supported the proposal, while others preferred longer term lengths for schools based upon their performance.  
  |                                                                 | Opinions varied regarding the type of actions OPSB should be able to take within a term, outside of routine oversight activities. |
| Renewal Eligibility Methodology                                                   | Overall positive feedback on proposed methodology of using multiple years of performance data for renewal, with most stakeholders preferring two years of data over three.  
  |                                                                 | Greater discussion needed on how average should be calculated (e.g., straight two-year average, weighted average over time, and/or by student count). |
| Eligibility for D Schools                                                        | Positive feedback on the proposal to grant D schools with high growth a 3 year term.  
  |                                                                 | However, bar for what type of growth is good enough and whether or not a school should be able to qualify more than once at this performance level were questioned. |
# Cycle 3 Activities and Outcomes (July-August)

## Cycle 3 Key Questions
- What adjustments need to be made to the current proposal?
  - How can the draft be more specific regarding the purpose and details of annual oversight?
  - How long should a charter term be and what level of accountability should occur within the term?
  - How many years and in what manner should we average multiple years of performance?
  - What level of growth is appropriate for a school who has an average of a D for renewal?
  - Should a D school with high growth be renewed repeatedly?

## Primary Activities
- Review of rationale for draft proposals
- Review of any data from the state regarding the impact of the ESSA formula on schools, in particular those at the D level of performance
- Review of data on alternative school renewal standards and criteria
- Constant reflection and discussion

## Key Takeaways/Deliverables
- Version 3.0 of the CSAF released on 8.21.17
  - Summary of Primary Revisions:
    - Refined Org. and Fin. Expectations and method for evaluating those areas annually
    - Targeted annual academic impact tracking
    - Continued revision to the School profile, especially in the area of school comparisons citywide
    - Method for averaging 2 years of performance for majority of schools
    - For schools in Turnaround, Slow Growth or Merger status, renewal eligibility decisions made on 1 year of data

  - Major Items Outstanding:
    - Length of charter terms schools are eligible for
      - Significant variation among stakeholders
    - Growth standard for a D school and eligibility in terms of multiple renewals under the D standard
      - Essential data from the state outstanding
Feedback received as of last Friday continues to inform our thinking and what revisions should be made to the draft CSAF.

Sample of Specific Feedback Requesting Changes to Current Version of the CSAF

- Term Lengths
  - Include 10 year option
  - Differentiate terms lengths among A, B, and C schools (such as, 4, 5, 6; 5, 6, 7; etc.)
  - Increase D term length to 4 years

- Automatic Renewal and the Renewal Process
  - Consider multiple years of SPS absolute performance (not an average)
  - Reconsider requiring any submissions from schools who are not eligible for automatic renewal

- Renewals for schools in their initial terms
  - Simplify expectation from Turnaround and Slow growth to be all schools in an “Initial Term”

- Financial Measures
  - Replace Cash on Hand with Current Ratio
Over the next several weeks OPSB will revise the CSAF and prepare policy for review by all stakeholders in advance of the October OPSB Board Meetings.

**Upcoming Milestones – Cycle 3**

- **Today**
  - Present latest CSAF and progress to the UAC

- **Sept. 1**
  - Request written feedback on latest CSAF from the AA Task Force

- **By Sept. 8**
  - Share draft policy that represents core aspects of the CSAF

- **Sept. 13**
  - Policy Workshop from 3:00pm-4:00pm

- **Oct. 10**
  - Goal: Present policy to the OPSB Board at its October meeting

**Ongoing Work – Cycle 3**

- **Await Data from the State on Impact of Growth Metric and New ESSA Standard**: OPSB will continue to work to collect as much information from the state to inform policy recommendations
- **Listen and Respond to the OPSB’s Vision and Strategic Priorities**: Participate in community forums and ensure the CSAF aligns to vision for city and strategic priorities
OPSB is already planning how it can test out aspects of the CSAF to ensure it can be implemented in a fair, rigorous way and move research forward to continually improve our local system.

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<th>Work Stream to Carry Out in 2017-2018</th>
<th>Overview of the Work to Be Done</th>
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| Test Oversight Processes and Tools  | • Carry out annual oversight activities this school year for currently authorized schools.  
|                                     |   • E.g., School visits, performance data reviews, special education and organizational compliance reviews, etc. |
| Test Oversight Communication Tools  | • Communicate with schools that OPSB currently authorizes and the public as OPSB executes oversight activities this year.  
|                                     |   • I.e. Notifications of non-compliance and annual school quality profiles. |
| Research to Inform Future Revisions and Additions | • Reflect throughout the 2017-2018 school year with core focus including ongoing reviews of  
|                                             |   • Organizational and financial expectations and compliance oversight.  
|                                             |   • Data reporting practices related to discipline and attendance to assess the reliability of data.  
|                                             | • Conduct research to evaluate the possibility and impact of developing and including the following in accountability activities beyond the 18-19 School Year:  
|                                             |   • Social and emotional learning measures.  
|                                             |   • ACT growth over time. |
Questions and Discussion
Develop the School Performance Framework

Milestone Progress

The Office of School Performance with support from the Accountability and Authorization Task Force has proposed revisions to the existing school performance framework. The new framework is called the Charter School Accountability Framework and it has received the following updates:

• Financial, Organizational and Academic standards
• Monitoring, Intervention and Renewal policies
• Alternative School framework

Next Steps

• Additional stakeholder feedback
• Preparing to present policy revisions to the Orleans Parish School Board in October for 1st reading
• Implementation planning
• Pilot of measures and development of additional tools
Clarify the future status of the New Orleans Therapeutic Day Program (NOTDP) within the New Orleans Community

Milestone Progress

The Orleans Parish School Board (OPSB) and Recovery School District (RSD) have collaboratively designed a future operating plan for the New Orleans Therapeutic Day Program (NOTDP) to become its own non-profit organization that ensures its future success in meeting the needs of its students, families, and schools.

Next Steps

- NOTDP to become a nonprofit organization before July 1, 2018
Refine existing policy around surplus or vacant buildings to align with the portfolio management process.

Milestone Progress

The bi-annual facility siting process provides new school operators, utilizing OPSB facilities, site assignments approximately 15 months prior to the start of school. This lead time allows new school operators to build support for their school in their community.

Next Steps

• Fall 2017 Facility Siting process to begin by August 31
Develop a plan and mechanisms to ensure financial viability for both OPSB and RSD during the transition to Unification

Milestone Progress

The Orleans Parish School Board (OPSB) and Recovery School District (RSD) have had their 2017-2018 fiscal year budgets approved. Both organizations are projected to remain financially viable through the transition period to Unification.

Next Steps