
Dr. Henderson Lewis Jr., Superintendent
November 28, 2016

Dear State Board of Elementary and Secondary Education, Orleans Parish School Board, Recovery School District, State Department of Education, and Education Committees of the Senate and House of Representatives,

On August 30th, 2016, the Orleans Parish School Board unanimously approved an historic plan to bring together the public schools of Orleans Parish in a unified school district under local oversight. This plan, as mandated by Act 91, committed to maintaining the autonomy of our city’s schools while reinforcing the critical role of local oversight, community engagement, and a democratically elected School Board in creating great public schools for our students and families. The passage of this Unification Plan set into motion a transition process to unify all public schools in New Orleans by July 1, 2018.

As we work through the transition process, we are guided by the five principles our community members helped us to articulate in the unification plan:

- **High Standards:** Every child in every neighborhood should have access to great public schools
- **Continued Progress:** We cannot be comfortable with the gains of the last 10 years; we must continually raise expectations, expand what is working, and cultivate new leaders and new ideas
- **Choice for Families:** Every family should have access to a diverse set of school options for their child through a clear and fair process
- **Ensuring Equity:** Differentiated resources and attention must go to ensuring that schools are succeeding for each individual student, based on his or her unique gifts, talents, and needs
- **Empowering Schools and their Communities:** Educators closest to students and families are empowered to make instructional decisions, and the community has a transparent understanding of their school options, the progress being made, and the way in which funds are being used

Consistent with our obligations under Act 91, we will be providing a quarterly update on our progress since implementing the Unification Plan every three months through July 2018. In submitting this first update, I am proud to report that we have made great progress and have met all of our December Milestones set forth in the Unification Plan. The work over the last three months to see unification off to a strong start has been a collaborative effort between OPSB and the RSD, and I am grateful for the partnership that we are fortunate enough to share. You can find full details of the December milestones in the presentation and separate enclosed documents; in this brief letter, I am pleased to share some highlights of milestones that are particularly critical to our students and families.

Our transition process has been transparent and collaborative

We know that engaging with all stakeholders in our community provides us with the perspective and knowledge to grant the greatest opportunities for our families and students. Since the beginning of the unification process, we have engaged in over 15 Task Force Meetings to address issues such as authorization, accountability, planning, facilities, enrollment, citywide resources, and transparency. We have continued to engage with community members on issues of school planning and vision setting for a unified system. We have also made it a priority to engage regularly with school leaders in order to get
their feedback on the School Performance Framework and the diversity of schools in our community. These processes have helped inform the progress made on all of the December Milestones, and more generally are helping OPSB evolve as an organization into a new model of collaborative decision-making with our stakeholders.

We have launched a plan to have students and community members help shape the vision for the future of education in New Orleans

As part of the unification plan, OPSB committed to creating a Citywide Vision and Strategic Goals Task Force to shape the vision and strategic plan for our school system beyond unification. In our conversations with the community, it became clear that there was no more valuable voice in helping to inform our priorities for public education than that of students themselves. With this in mind, we are convening a Citywide Vision and Strategic Goals Task Force that is led by students. These students will be chosen through an open application process overseen by community leaders, and those selected will work alongside teacher leaders to solicit input from their peers, lean on their own experiences, and listen to voices in the community to build a visioning document that will be presented to me and group of community leaders in May of 2017. I am excited to have students at the center of this work, and we pledge to use this vision to guide long-term strategic planning for Orleans Parish.

To complement the voice of students with that of educators, families, and community members, we will also be launching a community vision survey in the spring of 2017. This survey will provide key insights into the priorities and desires of our community. We will seek to answer questions such as:

“What does our community value most in a school system?”

“How can we improve our education system to best meet the needs of our families and students?”

“What should our city and our district prioritize for education in the next 5-10 years?”

This survey will provide additional data points to enable us to best plan for the future of our schools. It is my hope to create a vision and strategic plan that is not the product of the opinions and ideas of a few folks behind closed doors, but rather one that reflects and channels the priorities and aspirations of our students and our community.

Our plan for transitioning control of EnrollNOLA demonstrates that providing choice for families remains a top priority

In the past several years, EnrollNOLA and OneApp have created gains in equity and transparency that are critical to our public school system. OPSB and EnrollNOLA are committed to maintaining a culture of continual improvement that prioritizes equity for all students and providing great educational opportunities for our students.

Over the course of the last three months, members of my team have worked closely with the EnrollNOLA team to develop a comprehensive plan for the transition of EnrollNOLA from RSD to OPSB. This plan was informed greatly by input from the Citywide Services and Resources Task Force, which is made up of school leaders and community leaders. The plan includes a clear timeline for the transition of functions, contracts, personnel, finances, student data, and other key logistical items. The final transition of these items will occur prior to July 1, 2018.
While EnrollNOLA has made great strides and improvements since its inception, the plan also prioritizes engagement with community leaders, school-based leaders, families, and parents to further advance the success of the common enrollment system. The EnrollNOLA Advisory Committee will consider improvements to the system and also consider policy proposals for OPSB administration consideration. The Parent Council on Enrollment will work with parent advocacy groups to field parent input. Our engagement with these groups will allow us to continue to improve our enrollment system.

**We are off to a strong start and are well-positioned for the work that lies ahead**

While I have highlighted some of our December Milestones, I encourage you to read the full milestone report in order to dive deeper into the progress we have made. Our work in the first three months since the passage of the Unification Plan has been thorough, deliberative, and collaborative. I am proud of the work that has been accomplished thus far, but I recognize that there are still many challenging milestones ahead. Much of the work for our March, June, and September 2017 Milestones has already begun, and we will continue to work to ensure that all milestones are met.

Our Unification Plan is intended to lay out the steps for a successful unification and provide a clear roadmap for the policy and operational decisions that need to be made throughout the process. Additionally, the Unification Plan is intended to be a document that allows the community to continue to hold us accountable throughout the transition process. We hope this update gives you a clearer picture of the progress made and the work yet to come.

I continue to be humbled by the support that we have received throughout this process and fully realize that we cannot create a unified school system without the support of our political leaders, community members, educators, students, and families. I am honored to have the opportunity to lead this work and look forward to our continued collaboration throughout this process. I wish you all the best during this holiday season and look forward to reconvening in 2017.

Sincerely,

Henderson Lewis Jr., Ph.D.
Superintendent, Orleans Parish School Board
Unification Advisory Committee:
Quarterly Milestone Update

November 28, 2016
Agenda for today

1. Progress Update
   - Citywide Vision and Strategic Goals Task Force
2. Milestone Spotlight
   - EnrollNOLA Transition Plan
   - Policy
3. Public Comment
Unification Guiding Principles

- **High Standards:** Every child in every neighborhood should have access to great public schools.

- **Continued Progress:** We cannot be comfortable with the gains of the last 10 years; we must continually raise expectations, expand what is working, and cultivate new leaders and new ideas.

- **Choice for Families:** Every family should have access to a diverse set of school options for their child through a clear and fair process.

- **Ensuring Equity:** Differentiated resources and attention must go to ensuring that schools are succeeding for each individual student, based on his or her unique gifts, talents, and needs.

- **Empowering Schools and their Communities:** Educators closest to students and families are empowered to make instructional decisions, and the community has a transparent understanding of their school options, the progress being made, and the way in which funds are being used.
The transition process is off to a successful start

- We have successfully met all December unification milestones, and are pleased to be able to spotlight the progress that has been made.

- In addition, we have already made significant progress on some of the critical milestones that are scheduled for March, June, and beyond.

- Finally, we continue to work closely with school leaders and community members to solicit their input and work through complex decisions associated with unification.
We have engaged deeply with key stakeholders throughout the unification process.

Engagement has taken on a number of different forms including:

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Description</th>
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<tbody>
<tr>
<td>15+</td>
<td>Task Force Meetings covering authorization, accountability, planning, facilities, Enrollment, Citywide Services, and Transparency</td>
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<tr>
<td>10+</td>
<td>School leader meetings to discuss unification related items, updates to the performance framework, facilities, and other relevant items</td>
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<tr>
<td>10+</td>
<td>Community meetings, focus groups, and other meetings to get input from the community on unification related items, school planning, and values of a unified system</td>
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<tr>
<td>Monthly</td>
<td>Email updates to School Leaders, Board Chairs, Task Force members, and stakeholders throughout the community</td>
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Citywide Vision & Strategic Goals Task Force
As part of the unification plan, OPSB committed to launching a Citywide Vision and Strategic Goals Task Force.

This task force is charged with looking beyond July 2018 to articulate a long-term vision and direction...

- For public education in New Orleans
- For the role of OPSB in supporting that vision

Over the course of the summer, we also received strong feedback that OPSB should do more to solicit student voice and broader community input.

Our proposed plan for the Citywide Vision and Strategic Goals Task Force aims to accomplish all of these goals and respond to this feedback.
Our plan for the Citywide Vision and Strategic Goals Task Force has three core components

**Student-Led Visioning**

- A group of students will work with teacher leaders to articulate their vision for public education in Orleans Parish, and will present this vision to OPSB leadership and other community leaders in April/May 2017

**Community Vision Survey**

- To complement student input, OPSB will launch a Community Vision Survey this winter/spring to solicit feedback from families, educators, and community members on the needs they believe should be prioritized in the future of New Orleans public education

**OPSB Strategic Goals**

- Guided by the vision of students and the community, OPSB leadership will develop its long-term strategic goals and present them publicly by the beginning of the 2017-18 school year
We are launching an open process to identify and select students to drive the visioning process.

**Key Components of a Student-Led Visioning Process**

<table>
<thead>
<tr>
<th>10-15 Middle and High School Students</th>
<th>5 Experienced Teacher Leader Facilitators</th>
<th>Process and Final Visioning Document</th>
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<tbody>
<tr>
<td>• Students will be selected through an open application process promoted to all schools</td>
<td>• Teachers leaders will project-manage, determine timeline and meeting structure, communicate with students and schools about meetings, and provide guidance on the final visioning document</td>
<td>• Students should expect to meet ~2 times per month throughout January-April</td>
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<tr>
<td>• The Community and Transparency Task Force assembled this summer will help select the students who participate</td>
<td>• 5 teachers have been selected and are currently working to plan process</td>
<td>• The final visioning document will address two overall questions:</td>
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<tr>
<td></td>
<td></td>
<td>• What are the most important components that students want out of their schools?</td>
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<td></td>
<td></td>
<td>• What experiences and supports do students seek, that may or may not be available today?</td>
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</table>
The student application will be open through the first week of December. The application has been distributed to schools.

Teacher leaders have been identified and have met to discuss the plan moving forward for this task force; OPSB will work with those teacher leaders to continue craft a more detailed plan to engage students who are selected.

We aim to convene the selected students for the first time in December/January.
Unification Update:
Milestones
## December Milestone Progress: Summary

### All Unification Milestones Have Been Met

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Milestone</th>
<th>Complete</th>
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<tbody>
<tr>
<td><strong>Portfolio</strong></td>
<td>Clarify the roles of Superintendent and School Board on authorization,</td>
<td>✓</td>
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<tr>
<td></td>
<td>accountability, monitoring, etc.</td>
<td></td>
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<tr>
<td></td>
<td>Consider development of formal mechanism regarding School Leader engagement</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Citywide Services</strong></td>
<td>Create a transition plan for EnrollNOLA</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Facilities</strong></td>
<td>Start an assessment and life-cycle analysis of all school facilities</td>
<td>✓</td>
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<td></td>
<td>Ensure facilities lease contracts are in place for schools in renewal and/or transferring from RSD to OPSB in 2017-18</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Finance/ Operations</strong></td>
<td>Clarify HR transition of RSD employees to OPSB</td>
<td>✓</td>
</tr>
<tr>
<td><strong>LEA Status</strong></td>
<td>Provide information to current OPSB schools about financial and operational implications of leaving the OPSB LEA</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Engagement</strong></td>
<td>Convene Citywide Vision and Strategic Goals Task Force</td>
<td>✓</td>
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### Overview of March Milestones

The unification plan established the following milestones for completion in March 2017

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Milestone</th>
<th>Milestone Deliverables</th>
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<tbody>
<tr>
<td><strong>Portfolio</strong></td>
<td>Update Accountability &amp; streamlined Performance Framework</td>
<td>• Draft of updated School Performance Framework: Finance and Organizational Measures</td>
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<tr>
<td></td>
<td></td>
<td>• Test Monitoring Process</td>
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<tr>
<td></td>
<td>Alignment on authorization standards</td>
<td>• Align standards of OPSB and RSD on authorization standards during unification</td>
</tr>
<tr>
<td></td>
<td>Common Charter Operating Agreement</td>
<td>• Updated Charter Operating Agreement</td>
</tr>
<tr>
<td><strong>Facilities</strong></td>
<td>OPSB oversight of facilities maintenance and repair standards; additional policies (lease, handbook, etc.)</td>
<td>• Updated OPSB maintenance and repair standards handbook</td>
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<tr>
<td></td>
<td></td>
<td>• OPSB Policies</td>
</tr>
<tr>
<td><strong>Finance and Operations</strong></td>
<td>Plan for financial viability of OPSB &amp; RSD during transition</td>
<td>• MOU or other agreement between OPSB and RSD</td>
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<tr>
<td></td>
<td>Management of differentiated funding</td>
<td>• Process document for updating and ongoing implementation of differentiated funding</td>
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<tr>
<td></td>
<td>Access to data for oversight</td>
<td>• Agreement between LDE and OPSB for access to necessary student data</td>
</tr>
<tr>
<td><strong>LEA</strong></td>
<td>Provide information to current OPSB schools about chargebacks and services</td>
<td>• Communication document to schools clarifying chargebacks to schools for LEA-related services</td>
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Work on March milestones is underway; two March milestones need to be updated

- Work with the Authorization, Accountability, Performance Task Force has already begun to align authorization standards and create an updated School Performance Framework
- OPSB and RSD have begun work with a facilities working group and the Facilities Task Force to begin the process of updating OPSB’s maintenance and repair policies
- A data sharing agreement has been approved by LDE

Two March Milestones need to be updated

- OPSB has decided to extend the period of time in which schools can finalize their decision to leave OPSB’s LEA to March 2017; therefore, OPSB will be unable to provide full information on chargebacks and services to schools until after these decisions are made. This will now be a June 2017 milestone
- This milestone is contingent on FY18 budgets of both OPSB and RSD. Since budgets for both districts will not be confirmed until after March 2017, this milestone will need to be extended to September 2017
Milestone Spotlight: EnrollNOLA Transition Plan
December 2016 Unification Milestone calls for a specific and detailed transition plan for all aspects of EnrollNOLA.

OPSB is committed to:

- Sustaining the work of the city’s unified enrollment system,
- Upholding the values of the current system,
- Collaborating with a diverse group of stakeholders to ensure the system works for all students and families and continues to improve in response to the city’s needs.
Overview of the EnrollNOLA Transition Plan

- **Transitioning the critical components of EnrollNOLA to OPSB**: The critical components for transition are broken down into the following areas: (a) organizational transition, (b) personnel transition, (c) financial transition, (d) contract transition, and (e) student data transition.

- **Emphasizing collaboration to maintain community and school input**: This section includes further information on how OPSB has and will continue to collaborate with key school and community stakeholders to ensure a smooth, effective transition of citywide enrollment services to OPSB’s control.

- **Aligning the transition plan to OPSB’s unification principles**: This section details how the plan aligns with OPSB’s guiding principles.

- **Appendix**: The appendix includes details on select parts of the transition plan including (a) anticipated needs of EnrollNOLA’s office space and (b) vendor contracts to transition to OPSB.
Transitioning the Critical Components of EnrollNOLA to OPSB

**Organizational Transition**
- OPSB and RSD leadership team will continue holding frequent check-ins
- An EnrollNOLA Advisory Committee will be formed
- EnrollNOLA professional development will be held for all OPSB central office throughout 2017

**Personnel Transition**
- Physical transition of EnrollNOLA staff will begin in Winter 2018
- OPSB hiring process of EnrollNOLA staff will begin in January 2018 and conclude by July 2018

**Financial Transition**
- In FY17 & FY18, OPSB will provide funding to the RSD for EnrollNOLA at OPSB’s per-pupil costs
  - OPSB’s approved 2017 budget includes these EnrollNOLA costs
- In FY19, a financial plan will be in place to fully roll EnrollNOLA under OPSB management

**Student Data Transition**
- OPSB data team will coordinate with RSD and EnrollNOLA staff for successful transition of data
- Transition of student data will be done in accordance with all state/federal statutes

**Existing Contracts Transition**
- All contracts and licenses will be transferred to OPSB for FY19, once OPSB assumes full financial management of EnrollNOLA
Emphasizing Collaboration to Maintain Community and School Input

OPSB plans to incorporate perspectives from the community, schools, and families and parents through:

**EnrollNOLA Advisory Committee**
- Engage community leaders and school-based leaders
- The Advisory Committee will consider improvements to EnrollNOLA procedures and assist with the development of policy proposals for OPSB administrative consideration
- Composition and governing rules will be developed by OPSB, RSD, school leaders and other stakeholders

**Family Council on Enrollment**
- Engage families and parents
- OPSB will use this council as a mechanism to field parent input on the citywide enrollment system and the Parents’ Guide
| High Standards | The transition of existing functions of EnrollNOLA to OPSB, while simultaneously collaborating with all stakeholders to continue improving the EnrollNOLA functions and services, will ensure continued progress |
| Choice for Families | EnrollNOLA’s integration into OPSB’s citywide services will ensure students and parents have a clear process to apply to any of the city’s diverse schools |
| Ensuring Equity | Through the integration of community, school, and family perspectives, EnrollNOLA will develop mechanisms to provide adequate enrollment support to all of the city’s students with consideration of their individual needs |
| Empowering Schools and their Communities | The Advisory Committee and Family Council will both seek to empower parents and community members by incorporating their perspectives into future procedural and policy changes to EnrollNOLA |

Bringing the citywide enrollment mechanism to a unified school system will allow OPSB to seek to ensure all children and families have transparency and access to great public schools.
2017 Policy Items

**Winter 2017**
- Charter School Operating Agreement Policy – (Policy HAA – NEW)
- LEA Policy (Policy HA)
- Facilities Policies (Policy HD, EB, FJ, FE)
- Charter Operator Enrollment Cap Policy (Policy HA)

**March 2017 and Beyond**
- Funding Policies (Expected early Spring 2017)
- Facilities Preservation Program (Expected Spring 2017)
- Enrollment (Expected Spring/Summer 2017)
- Performance Framework (Expected Summer/Fall 2017)
Background: LEA Status for Charter Schools in Orleans Parish

**Before Act 91**
- Type 2s and 5s are their own LEAs
- Type 1s and 3s are part of the local school board’s LEA
- Type 3Bs choose at the time of transfer whether to remain their own LEAs or become part of the school board’s LEA

**Act 91** *(R.S. 17:10.7.1(G)(2))*
- OPSB Type 1s and 3s may become their own LEAs with OPSB approval
- BESE required to develop policy to allow 1s and 3s to become LEAs and to specify financial and programmatic obligations
- State Supt. may rescind a Type 1 or 3’s LEA status if the school fails to meet obligations

**Proposed BESE Policy**
- BESE will consider policy at the Dec. 6 BESE meeting
- OPSB and RSD have been working with staff from LDE to develop the substance of this policy, to ensure it is tailored to charter schools in Orleans and aligns with the unification process
Proposed BESE Policy – Becoming an LEA

- Type 3Bs continue to choose at the time of transfer whether to remain their own LEAs or become part of OPSB’s LEA

- In Spring 2017, all existing and newly opening OPSB Type 1s and 3s may choose to become their own LEAs, beginning on July 1, 2017

- In future years:
  - New Type 1s and 3s may choose to be their own LEAs prior to opening
  - Type 1s, 3s, and 3Bs can choose to become their own LEAs at renewal
  - OPSB Supt. may allow Type 1s, 3s, and 3Bs to become their own LEAs in the middle of charter term

- Both the charter school’s board and OPSB must approve the charter school’s request to become its own LEA; documentation of approval must be received by the State Superintendent no later than April 1st
All OPSB Type 1s, 3s, and 3Bs who are their own LEAs must:

- Continue participation in common enrollment, or if not currently participating, join upon next renewal, as required by school board policy (OPSB Policy HA)

- Continue participation in common expulsion process

- Comply with all requirements of federal and state special education laws and regulations for LEAs (ex: must enroll, register, transfer, and provide FAPE without regard to disability or level of needs)

- Enroll and register students without regard to ELL status, and provide all required ELL services

- Provide student transportation as required by school board policy (OPSB Policy HA)

- Comply with all financial, testing, and reporting requirements related to LEA status required by OPSB or LDE
Next Steps

**BESE**

- Proposed BESE policy was posted publicly on Saturday, Nov. 26
- BESE will consider policy on Dec. 6

**OPSB**

- Financial and operational analysis work is ongoing, including consultations with LDE to develop initial financial impact projections for schools exiting OPSB’s LEA
- OPSB policies on LEA status to be introduced in January 2017 (1st reading); drafts will be provided to schools in advance of presentation to Policy Committee

The December Citywide School Leader meeting will include a full briefing from OPSB on LEA-related considerations, including details on OPSB’s existing LEA functions and services in response to requests from school operators.
Milestone Progress

The Orleans Parish School Board passed amendments to Policies HAB, HB, and HC in Summer 2016

• These policies align the roles of the Board and Superintendent in accordance with statutory provisions, to ensure clarity when making authorization, accountability, and monitoring decisions

• These policies permit the Superintendent to advance recommendations in key authorization areas, with Board oversight through a two-thirds majority vote to override recommendations

Next Steps

• OPSB will now implement these policies through the School Performance Framework and other formal mechanisms to ensure that schools comply with both Policy HB and HC

• Next Step: December 2016 charter renewal recommendations
Consider development of formal mechanism regarding School Leader engagement

Milestone Progress

The OPSB has launched several formal mechanisms for engaging with school leaders throughout the transition to unification:

- OPSB meets with school leaders from both the OPSB and RSD monthly
- School Leaders (or their representatives) have been asked to participate on every unification task force
- School leaders currently receive monthly communication from the Superintendent via email that addresses upcoming policy items, unification related updates, and other pertinent information

School leader engagement has three key objectives:

- Updating leaders on unification progress
- Engaging on key questions as policies and decisions are being designed
- Seeking input on draft policies and decisions

Next Steps

- OPSB will continue to work with school leaders throughout the unification process
- OPSB will continue to explore additional forms of school leader engagement for the long term
- OPSB will survey school leaders to solicit their feedback on ways to formalize school leader engagement
Create a transition plan for EnrollNOLA

Milestone Progress

A finalized draft of an Enrollment Transition plan has been completed

• The plan addresses a number of issues including: personnel transfers, finances, plans for continued improvement, etc.

• The plan lays out the timeline for the transfer of EnrollNOLA from RSD to OPSB by July 1, 2018

• The plan outlines how to involve the community in planning for the future of EnrollNOLA and how the enrollment process can best serve students and families

Next Steps

• OPSB and RSD are instituting an advisory group to help drive improvements to EnrollNOLA

• OPSB and RSD will continue to engage throughout the unification process and work towards the transition of EnrollNOLA in 2018
Start an assessment and life-cycle analysis of all school facilities

The Orleans Parish School Board approved a contract with Vanir Construction Management on September 15, 2016, to conduct an analysis of school facilities

- The facilities condition assessment is focused on schools that have had limited renovation and refurbishment since 2005 or schools that were renovated/constructed shortly after 2005
- The assessment will focus on a variety of issues including: exterior systems, interior systems, health and safety issues, handicap access, heating and air conditioning, electrical, and plumbing
- The assessment will be used to clarify the remaining useful life of the building, propose solutions to facility deficiencies, prioritize needs of each building from a district perspective
- Collected data will be compiled in a database to allow for district-wide, site-specific, and system-specific analysis in order to inform Facilities Preservation Fund Planning

**Milestone Progress**

**Next Steps**

- **Nov.-Dec. 2016**: Database will be prepared and pilot assessments will be performed
- **Jan.-March 2017**: On-site assessments will be conducted
- **April-May 2017**: Reports will be finalized and the database of schools will be turned over to OPSB
Ensure facilities lease contracts are in place for schools in renewal and/or transferring from RSD to OPSB in 2017-18

**Milestone Progress**

OPSB has defined a process to ensure that facilities lease contracts will be in place for schools renewing contracts and transferring from the RSD for the 2017-2018 school year

- School leases will be developed in conjunction with the updated charter operating agreement (March 2017 Milestone) and the updated Facilities and Maintenance Policy (March 2017 milestone)
- A crosswalk analysis of OPSB and RSD lease agreements has been conducted to inform planning
- School Leaders and the Facilities Task Force have provided feedback on changes to the lease agreement
- Current leases are under review and will be updated to reflect feedback received from stakeholder groups

**Next Steps**

- In preparation for a unified charter contract in March 2017, a unified lease agreement will undergo a full legal review
- Policy changes and an accompanying handbook review will take place in January and February 2017
- OPSB will present the updated charter lease agreement to the school board in 2017
Clarify HR transition of RSD employees to OPSB

**Milestone Progress**

A process document has been finalized that identifies the transition process for RSD employees to OPSB

- This document clarifies key elements of HR Policy including: position identification, the hiring process, OPSB benefit information, time allocation, compensation, and onboarding policy

- Additionally, this document lays out a clear process by which RSD employees can join OPSB without disruption to current OPSB hiring practices

- Key stakeholders from the RSD have met with OPSB leadership to determine next steps

**Next Steps**

- This process will now be implemented for any RSD employees who transfer to OPSB

- OPSB will continue to engage in conversation with RSD employees to discuss the transition
Provide information to current OPSB schools about operational and financial implications of leaving the OPSB LEA

**Milestone Progress**

OPSB is holding a citywide school leader meeting on December 1st to help inform schools of changes to their funding and service provision if they were to leave OPSB’s LEA

- OPSB will provide an overview of the services it currently provides to schools within its LEA
- School leaders will receive information related to the impact on funding sources to their school (e.g., Title and IDEA) and services they would receive if their school decides to leave OSPB’s LEA

**Next Steps**

- OPSB continues to work with LDE to clarify the roles and responsibilities of schools that opt to become their own LEA (Jan)
- Schools must indicate whether they intend to exit the LEA (March)
- BESE will provide final and estimates related to schools’ election to become their own LEA (April)
- Additional information regarding chargebacks for services will be addressed in future milestones
Convene Citywide Vision and Strategic Goals Task Force

**Milestone Progress**

- OPSB and RSD have created the purpose, scope, and project timeline for the student-led visioning process
  - Several teacher leaders have been identified to guide the students’ efforts to define a vision for education in Orleans Parish
  - An application for students has been created and launched with input from the teacher leaders
  - Students will be selected for participation in the Citywide Vision and Strategic Goals Task Force in December 2016

**Next Steps**

- Student selections will be completed by December 15th
- Led by teacher leaders, students will be tasked with developing a visioning document for presentation to the Superintendent in May of 2017
- OPSB will launch a community survey in the Spring of 2017
- The students’ final visioning document will be presented to OPSB in May 2017
Introduction

Recognizing the substantial importance of EnrollNOLA to schools and families across the city, the Orleans Parish School Board and Recovery School District have worked to develop a detailed transition plan for all EnrollNOLA functions to OPSB. This plan is rooted in the principles guiding OPSB’s overall unification plan:

- **High Standards:** Every child in every neighborhood should have access to great public schools.
- **Continued Progress:** We cannot be comfortable with the gains of the last 10 years; we must continually raise expectations, expand what is working, and cultivate new leaders and new ideas.
- **Choices for Families:** Every family should have access to a diverse set of school options for their child through a clear and fair process.
- **Ensuring Equity:** Differentiated resources and attention must go to ensuring that schools are succeeding for each individual student, based on his or her unique gifts, talents, and needs.
- **Empowering Schools and their Communities:** Educators closest to students and families are empowered to make instructional decisions, and the community has a transparent understanding of their school operations, the progress being made, and the way in which funds are being used.

We developed this plan in the spirit of collaboration. Collaborators whose participation are emphasized within the plan include staff at the RSD and EnrollNOLA, as well as the Citywide Services and Resources Task Force, which consists of school and community leaders.

OPSB is committed to sustaining the work of the city’s unified enrollment system, to upholding the values of the current system, and to collaborating with a diverse group of stakeholders to ensure the system works for all students and families and continues to improve in response to the city’s needs.

Document Outline

The remainder of this transition plan includes the following sections:

I. **Transitioning the critical components of EnrollNOLA to OPSB:** The critical components for transition are broken down into the following areas: (a) organizational transition, (b) personnel transition, (c) financial transition, (d) contract transition, and (e) student data transition.

II. **Emphasizing collaboration to maintain community and school input:** This section includes further information on how OPSB has and will continue to collaborate with key school and community stakeholders to ensure a smooth, effective transition of citywide enrollment services to OPSB’s control.

III. **Aligning the transition plan to OPSB’s unification principles:** This section details how the plan aligns with OPSB’s guiding principles.

IV. **Appendix:** The appendix includes details on select parts of the transition plan including (a) anticipated needs of EnrollNOLA’s office space and (b) vendor contracts to transition to OPSB.
I. Transitioning the Critical Components of EnrollNOLA to OPSB

The table below outlines how OPSB will carry out EnrollNOLA’s organizational transition, personnel transition, financial transition, student data transition and existing contract transition.

<table>
<thead>
<tr>
<th>Component</th>
<th>Details</th>
</tr>
</thead>
</table>
| Organizational Transition | • To ensure a strong transition from RSD to OPSB, for the 2016-2017 and 2017-2018 school year, OPSB will maintain a close working relationship with the RSD. Senior leadership team members will continue to check in with each other and will make strategy, policy and practice decisions in collaboration with one another.  
  • EnrollNOLA will institute an EnrollNOLA Advisory Committee, the development of which has been discussed with and is supported by the Citywide Services Task Force.  
  • Future board policy changes to enrollment will require a board vote; meanwhile, the set of procedures used to manage the day-to-day work of the organization will be determined by the administration with key input from the EnrollNOLA Advisory Committee and other stakeholders.  
  • As part of this work, the EnrollNOLA team will provide professional development to the full OPSB central office team throughout 2017. The first training, to be held in January 2017, will be used to determine the timeline and topics for future meetings. EnrollNOLA staff has already begun to hold bi-weekly meetings with the OPSB Network Team. |
| Personnel Transition   | It is OPSB’s intention to maintain EnrollNOLA’s current set of functions (see appendix for more details on these functions). The plan to transition EnrollNOLA personnel to work under the management of OPSB will follow applicable Board policies and will occur under the following timeline:  
  • **Fall 2017:** OPSB will make office space available on location for EnrollNOLA leadership and staff (see appendix for more details on this office space).  
  • **Winter 2018:** Following the start of the 2017-2018 school year, EnrollNOLA staff will transition its physical location to OPSB’s central office. This is to avoid the complications of an office move during the peak summer late enrollment window.  
  • **January 2018:** Following applicable Board policies, OPSB will be begin the hiring process.  
  • **July 2018:** The full EnrollNOLA team will be hired and in place at OPSB. |
<p>| Financial Transition   | • In FY17, OPSB will provide funding to the RSD for EnrollNOLA at OPSB’s per pupil costs. These costs are anticipated to be approximately $500,000, and, as a result, a line item for $500,000 has been included in the OPSB budget for these purposes. OPSB’s board will be asked to consider a Memo of Understanding to support this expense. |</p>
<table>
<thead>
<tr>
<th>Component</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• In FY18, OPSB will provide funding to the RSD for EnrollNOLA at OPSB’s per pupil costs. The formula for these costs are included in the Memorandum of Understanding that the OPSB board is being asked to consider.</td>
</tr>
<tr>
<td></td>
<td>• A financial plan will be in place to fully roll EnrollNOLA under OPSB’s management in FY19.</td>
</tr>
<tr>
<td>Student Data Transition</td>
<td>• The OPSB data team will coordinate with the RSD and current EnrollNOLA staff to ensure that all relevant student data is transitioned successfully and in accordance with all state/federal statutes protecting student privacy. This will include the transfer of existing Data Sharing MOUs that are currently in place between the RSD and individual LEAs, and early childhood programs, as required.</td>
</tr>
<tr>
<td></td>
<td>• OPSB will establish an MOU with the Louisiana Department of Education to ensure that EnrollNOLA can continue to include the Louisiana Scholarship Program in OneApp.</td>
</tr>
<tr>
<td>Existing Contracts Transition</td>
<td>• OPSB will ensure all contracts and licenses are transferred to OPSB for FY19, once OPSB assumes full financial management of EnrollNOLA in accordance with OPSB procurement policies (See the appendix for details on the contracts to be transitioned to OPSB.)</td>
</tr>
</tbody>
</table>

II. Emphasizing Collaboration to Maintain Community and School Input

A History of Collaboration between the RSD and OPSB

OPSB and RSD have worked closely on the work of EnrollNOLA for years, including the initial work to launch the common enrollment system, the creation of a steering committee, and the work to modify it over time into the organization it is today.

Since the creation of the enrollment system, oversight of that system has broken down in the following way:

- **RSD as the leader:** RSD has had the lead role in this work throughout. Notably, EnrollNOLA staff are employed by the RSD, and the RSD has essentially financed the enrollment system through most of its existence.

- **OPSB as a key advisor:** OPSB has worked in an advisory and supportive capacity along the way. OPSB has demonstrated its commitment to the work of EnrollNOLA in a variety of ways, most notably by putting in place policies that require all schools (upon renewal) to participate in this common enrollment system.

Since OPSB launched its participation in EnrollNOLA in the fall of 2012 (for the 2013-2014 school year), the OPSB administration has been a key partner to the EnrollNOLA team. The Assistant Superintendent for Enrollment with the RSD, and the Chief Portfolio Office with the OPSB check in frequently to address issues of strategy, policy and practice. Senior data team members in both organizations also work
together closely and align on the many intersecting pieces of work related to citywide enrollment and portfolio planning. Superintendent Lewis also works directly with EnrollNOLA leadership given the significance of this work to schools and families across New Orleans.

**The Plan to Bring in Community Leaders, School Leaders, and Parents to Improve EnrollNOLA**

For the 2016-2017 and 2017-2018 school year, this close working relationship between the RSD and OPSB will continue, as demonstrated by the above details in the organizational transition. Further, OPSB plans to incorporate perspectives from the community, schools, and families and parents to continue to improve the city’s centralized enrollment system through two planned mechanisms (table below): (1) The EnrollNOLA Advisory Committee and (2) The Parent Council on Enrollment.

<table>
<thead>
<tr>
<th>Mechanism</th>
<th>Key Stakeholders Involved</th>
<th>Details</th>
</tr>
</thead>
</table>
| EnrollNOLA Advisory Committee    | Community leaders         | • Since OneApp’s implementation in 2012, RSD and OPSB have worked with school and community partners to develop enrollment policy proposals and refine the operations and procedures of EnrollNOLA.  

• This Advisory Committee will consider improvements to EnrollNOLA procedures and assist with the development of policy proposals for OPSB administrative consideration.  

• OPSB and RSD will develop the composition and the governing rules in partnership with school leaders and other stakeholders. |
|                                 | School-based leaders      |                                                                                                                                                                                                         |
| Parent Council on Enrollment    | Families and parents      | • To ensure parents are best able to navigate the citywide enrollment system, OPSB will seek to collaborate with parent advocacy organizations and use this proposed Council as a mechanism to field parent input.  

• One critical area where parent input will be the Parents’ Guide, which along with EnrollNOLA, is planned to come under OPSB’s responsibilities. OPSB will seek to utilize parent input to improve on the successes of the Parents’ Guide and to integrate the guide into the EnrollNOLA website. The Parents’ Guide, which will now be referred to as the EnrollNOLA School Guide, has transitioned to EnrollNOLA management for the 2016-2017 cycle. |

**III. Aligning the EnrollNOLA Transition Plan to the OPSB’s Unification Principles**

As previously stated, this transition plan is rooted in OPSB’s unification principles. The below table further details how OPSB is making a concerted effort to align the EnrollNOLA transition efforts with OPSB’s overall vision for unification:
<table>
<thead>
<tr>
<th>Guiding Principle of OPSB’s Unification Plan</th>
<th>EnrollNOLA Transition Plan’s Alignment to the Guiding Principle</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Standards</td>
<td>• By bringing the citywide enrollment mechanism to a unified school system, OPSB will seek to ensure that all children and families have transparency and access to great public schools.</td>
</tr>
<tr>
<td>Continual Progress</td>
<td>• The EnrollNOLA transition plan recognizes that the current enrollment system has made great strides from its conception, and, as a result, this transition plan seeks to transition EnrollNOLA to OPSB rather than start anew.</td>
</tr>
<tr>
<td></td>
<td>• Through collaboration with the RSD, OPSB will also ensure the transition builds on the knowledge of EnrollNOLA’s current staff and managers.</td>
</tr>
<tr>
<td></td>
<td>• Further, by incorporating outside collaboration from community stakeholders, school leadership, and families, during the planning, implementation, and execution phases of this transition, the OPSB will seek to position the city’s enrollment system to make continued progress.</td>
</tr>
<tr>
<td>Choices for Families</td>
<td>• The integration of EnrollNOLA (as well as the Parents’ Guide) into OPSB’s citywide services will ensure that students and parents have a clear process to apply to any of the city’s diverse schools.</td>
</tr>
<tr>
<td></td>
<td>• Per policy, all OPSB schools will be included in the citywide enrollment system in the coming years as the schools come up for charter renewal.</td>
</tr>
<tr>
<td>Ensuring Equity</td>
<td>• By enhancing OPSB’s role over EnrollNOLA and by creating clear processes and supports for students and parents to apply to any school in the city, the citywide enrollment system will provide students with individual access to the schools that best meet his or her needs.</td>
</tr>
<tr>
<td></td>
<td>• Through efforts to integrate community, school, and family perspectives, OPSB will seek to ensure that EnrollNOLA develops mechanisms to provide adequate enrollment support to all of the city’s students with consideration of their individual needs.</td>
</tr>
<tr>
<td>Empowering Schools and their Communities</td>
<td>• The Advisory Committee and Parent Council will both seek to empower parents and community members by incorporating their perspectives into future procedural and policy changes to EnrollNOLA.</td>
</tr>
<tr>
<td></td>
<td>• By transitioning EnrollNOLA into its citywide services, OPSB will provide the community with a transparent understanding of their school options and how to apply to those options.</td>
</tr>
</tbody>
</table>
A. Plans for the EnrollNOLA Office Space

The Family Resource Center will continue to be a welcoming space for families and community members who have questions or need assistance in enrolling their students, and will remain located on the first floor. Our current plan is that the EnrollNOLA office will be located alongside the existing EnrollNOLA Family Resource Center on the first floor of OPSB’s central office.

The future office will provide adequate space for the full EnrollNOLA central office team. As such, OPSB will keep EnrollNOLA’s current office configuration top-of-mind as it sets up the future office space.

B. Vendor Contracts and Licenses to Transition to OPSB for FY18

The following vendor contracts have been flagged by RSD for the transition of EnrollNOLA to OPSB:

<table>
<thead>
<tr>
<th>Business</th>
<th>Description of Services</th>
<th>Contract Value per Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acumen Solutions</td>
<td>Acumen built the SchoolForce platform for EnrollNOLA and provides regular support as well as development and professional services.</td>
<td>Annual Support: $25,000</td>
</tr>
<tr>
<td>Liquid Web</td>
<td>Liquid Web hosts the EnrollNOLA website</td>
<td>Annual Hosting Fee: $720</td>
</tr>
<tr>
<td>Carahsoft</td>
<td>Carahsoft provides EnrollNOLA with annual licenses to Salesforce</td>
<td>Annual License Free $40,000</td>
</tr>
</tbody>
</table>

C. Plan for Remaining OPSB Schools to Become Part of the Citywide Enrollment Process

Per existing OPSB Policy, all OPSB authorized charter schools are required to join the citywide enrollment system upon approval or renewal. Six OPSB schools are not yet integrated into the citywide enrollment system. These schools will be integrated into the enrollment system when their charters are up for renewal, 3 of them in 2017 and 3 in 2021.

Three schools will be integrated into the citywide enrollment system on July 1, 2017, at which point they will begin following EnrollNOLA policies and procedures related to Late Enrollment and mid-year transfers. They will be included in the OneApp process for the 2018-2019 school year. The three schools are:

- Audubon Charter School
- Edward Hynes Charter School
- Robert Russa Moton

The following three schools will be required to join the citywide enrollment system on July 1, 2021, unless they choose to opt in at an earlier date:

- Benjamin Franklin High School
Lake Forest Charter School
- Lusher Charter School

D. Job Titles and Descriptions for EnrollNOLA Staff

OPSBN plans to maintain EnrollNOLA’s staffing structure as it currently exists when EnrollNOLA transitions to OPSB’s management. As part of its budget planning for future years, OPSB plans to allot sufficient funds to cover the costs of all of the staff. The EnrollNOLA team is organized as follows:

<table>
<thead>
<tr>
<th>Team</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytics</td>
<td>The Analytics team is responsible for the administration and maintenance of SchoolForce, the application and enrollment management system that EnrollNOLA uses to house all student data. As part of this work, the Analytics team prepares all data and executes the annual OneApp lottery.</td>
</tr>
</tbody>
</table>
| Enrollment Transitions   | The Enrollment Transitions team works to ensure that all families who transition into and out of the school system outside of the traditional OneApp process are well served. These transitions include:  
                           - Students who are recommended for expulsion  
                           - Families who submit Hardship Transfers  
                           - Families who are re-entering the system from secure care facilities, in partnership with the Youth Opportunity Center. |
| Communications           | The Communications team is responsible for all internal and external communications, including, but not limited to, enrollment-specific communications with schools, the OneApp application materials, the EnrollNOLA website, and the EnrollNOLA Annual Report. |
| Student & Family Services| The Student & Family Services team staff EnrollNOLA’s three Family Resource Centers. This team is responsible for assisting families on an as-needed basis in the following areas: enrolling for the current school year, submitting OneApp for the following school year, verifying a family’s eligibility for publicly funded early childhood programs, providing technical assistance and computer access, and advising on the school options available to families. |
Introduction

**Unification Task:** The Orleans Parish School Board (OPSB) will begin to examine current salary, benefits and responsibilities of Recovery School District (RSD) employees who may transition to OPSB. An ongoing process will include the financial analysis required to determine if any changes can or need to be made to current compensation packages to fit into the budget. OPSB should examine timing of transfers for each employee and should consider an option to divide an employee’s time between the RSD and OPSB during the transition period in order to avoid overlapping functions or duplicate efforts. OPSB should identify transition leaders to work to onboard and recruit RSD personnel.

In order to allow for a smooth transition of employees from the RSD to OPSB, as necessary and appropriate, OPSB is committed to examining current salary, benefits, and corresponding responsibilities of RSD employees who may transition to OPSB to continue supporting strategic initiatives that will transfer employers throughout the Unification process. OPSB has worked to develop a detailed human resource transition plan for all employees who may transfer from the RSD to OPSB. This plan is rooted in the principles guiding OPSB’s overall unification plan:

- **High Standards:** Every child in every neighborhood should have access to great public schools.
- **Continued Progress:** We cannot be comfortable with the gains of the last 10 years; we must continually raise expectations, expand what is working, and cultivate new leaders and new ideas.
- **Choices for Families:** Every family should have access to a diverse set of school options for their child through a clear and fair process.
- **Ensuring Equity:** Differentiated resources and attention must go to ensuring that schools are succeeding for each individual student, based on his or her unique gifts, talents, and needs.
- **Empowering Schools and their Communities:** Educators closest to students and families are empowered to make instructional decisions, and the community has a transparent understanding of their school operations, the progress being made, and the way in which funds are being used.

This plan was developed with a focus on ensuring as transparent of a process as possible while also allowing OPSB to move expediently to hire employees from the RSD who would be add immediate value, based on previous work experience at the RSD, under OPSB’s new structure.

OPSB is fully committed to identifying the best possible employees to support the city’s unified school district.
V. **Process Document**: Given the unique nature of unification and the associated goals as outlined in the milestone above, this section describes a set of recommended procedures to uphold OPSB’s commitment to its students and families.

<table>
<thead>
<tr>
<th>Hiring Process Component</th>
<th>Key Stakeholders Involved</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Identification</td>
<td>Milestone Lead</td>
<td>Each OPSB milestone lead will identify the skills and personnel required for his/her milestone plan.</td>
</tr>
<tr>
<td></td>
<td>OPSB COO</td>
<td>• As with any OPSB hire, each OPSB milestone lead will update the job descriptions for all vacant positions identified in the plan. As with any OPSB job description, each job description will reflect the expectations and requirements of an employee working for OPSB.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For each function, specific skill set, relevant work experience, and training required to perform the function will be identified and incorporated into the job description. Where possible, functions will be combined to ensure the effective use of limited resources.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• OPSB will commit, where possible, to posting vacant positions well in advance of a transition. When possible, impacted RSD employees will be receive notice 60 days in advance. The new OPSB position will be posted 10-15 days after initial notice.</td>
</tr>
<tr>
<td>Recruitment</td>
<td>Milestone Lead</td>
<td>Milestone leads will determine if any internal candidates or RSD candidates could meet all necessary job requirements. If so, an interview will be conducted with all such qualified candidates and a candidate may be offered a position based on satisfactory interview and fulfilling all other components (references, background check, etc.). Should an internal or RSD candidate not be identified, the job description will be posted and advertised by the Human Resources department.</td>
</tr>
<tr>
<td></td>
<td>OPSB COO</td>
<td>• Candidates for each position will be interviewed by a committee consisting of the division head or department head to whom the position will report, a human resources representative, and a person or persons with an understanding of the position functions.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The committee will recommend one candidate to the Superintendent for final approval.</td>
</tr>
<tr>
<td>Hiring Process Component</td>
<td>Key Stakeholders Involved</td>
<td>Details</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Benefit Information</td>
<td>OPSB Director of HR</td>
<td>OPSB will give RSD employees the information and time they need to make informed decisions about their employment.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- OPSB will provide RSD employees with a summary document that outlines, from a Human Resources perspective, what it means to work for OPSB. This document will outline aspects of OPSB and RSD including insurance, retirement, work-day expectations, paid leave, paid time off and job security. This document will be shared with all RSD employees by December 23, 2016.</td>
</tr>
<tr>
<td>Time Allocation throughout transfer</td>
<td>Milestone Lead</td>
<td>Instances in which OPSB administration determines that the needs of students and families are best met with a time-split between the RSD and OPSB will be handled on a case-by-case basis. All time-split positions will be approved by OPSB and RSD Superintendent.</td>
</tr>
<tr>
<td></td>
<td>OPSB Director of HR</td>
<td>- In general, this time-split would be part of an employee’s transition to a full-time position with OPSB. OPSB’s formal application process will be followed when transitioning an employee from a time-split role into a full-time position with OPSB.</td>
</tr>
<tr>
<td></td>
<td>OPSB COO</td>
<td>- Although OPSB does not anticipate engaging in this structure often, it is important to prepare for a range of potential occurrences. Should this structure be required, it will be covered under a master MOU to be drafted and signed between the RSD and OPSB. Details of the specific time-split position will be captured under the master MOUS and outline the payment structure and agreed upon transition timeline for the employee.</td>
</tr>
<tr>
<td>Compensation</td>
<td>OPSB Director of HR</td>
<td>When possible, OPSB will work to match RSD salaries for those positions transferring to OPSB in instances where job duties are identical or substantially similar to the employee’s current duties. Prior to interviewing any RSD candidates, OPSB Human Resources will communicate with RSD candidates if salaries can be matched. If they can’t, the salary being offered will be communicated to RSD employee prior to interview.</td>
</tr>
<tr>
<td></td>
<td>Milestone Lead</td>
<td></td>
</tr>
<tr>
<td></td>
<td>COO</td>
<td></td>
</tr>
<tr>
<td>Hiring Process Component</td>
<td>Key Stakeholders Involved</td>
<td>Details</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Transition Leadership</td>
<td>Milestone Lead</td>
<td>When necessary, the Chief level officer responsible for hiring a particular RSD employee shall serve as transition leaders to onboard and recruit RSD personnel.</td>
</tr>
<tr>
<td></td>
<td>OPSB Director of HR</td>
<td></td>
</tr>
</tbody>
</table>
Facilities Update: Milestone Progress
Orleans Parish School Board & Recovery School District
November 2016

I. Facilities Assessment and Life-Cycle Analysis

As part of the Unification Plan, the Orleans Parish School Board (OPSB) committed to planning for an assessment and life-cycle analysis of all school facilities, in order to inform School Facility Preservation Program Planning for emergency and planned capital repairs. OPSB has contracted with Vanir, a program management and assessment firm, to conduct a facilities condition assessment focused on schools that have had limited renovation/renovation since Hurricane Katrina. A number of the schools that were renovated/constructed shortly after Katrina will be included in the project to determine how well the systems have aged in the past 9-10 years.

Under the contract, Vanir’s facilities condition assessment will be comprised of the following activities.

Key Assessment Activities:

- Conduct a comprehensive systems and materials assessment of all school facilities. Evaluate the condition of buildings, including but not limited to:
  - Site
  - Exterior systems: roofs, walls, window systems, exterior doors and structural components
  - Interior systems: walls, doors, floors and ceilings, visible structure, and finishes
  - Health/fire/life safety issues
  - Safety and security assessment using Crime Prevention Through Environmental Design (CPTED) criteria
  - Handicap access (ADA) requirements
  - Heating, ventilation and air conditioning
  - Electrical and electrical distribution
  - Network wiring & wireless networking infrastructure
  - Telephone and voice communication infrastructure; telephone and voicemail system
  - Plumbing systems
  - Fire protection
  - Security system
- Collect and compile supporting documentation of facility findings, including narrative, photos, and diagrams
- Document length of remaining useful life for building systems and components
- Based on data from the assessment, develop costs (reflecting appropriate adjustments for local labor and material costs), and prioritize recommendations from 2017-2027
- Propose remedy of facility deficiencies
- Provide itemized costs for each individual repair or upgrade item
- Prioritize the needs of each campus within the total facilities needs of the district. Include calculation of a Facilities Condition Index for each site
- Compile data in a manner that allows a variety of analyses of the data, i.e., district-wide, site-specific, system specific, etc.
- Database shall compile all of the data collected as well as contain links to photographs, drawings, and other supporting documentation; have the capacity to integrate existing district data (hazardous
materials audits, engineering studies, etc.); and software shall provide the ability to develop different sorts and reports as needed.

- Update CAD drawings that were developed in 2008 for each property. Use construction as-built to develop drawings for CAD drawings following the 2008 format for all new/renovated/refurbished buildings.

The contracted facilities condition assessment and life-cycle analysis will be completed by May 2017, according to the following schedule.

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Work Completed</th>
</tr>
</thead>
</table>
| November – December 2016 | • Prepare database  
                        | • Conduct pilot assessments  
                        | • Compile contact information for schools  
                        | • Establish communications protocol |
| January – March 2017   | • Conduct on-site assessments                        |
| April – May 2017      | • Finalize reports and turn over database            |
Meeting the March 2017 Facilities Milestone (*Determine the level of oversight that OPSB will have over OPSB-owned and private facilities, including which aspects of facility maintenance and repair standards will be centrally inspected*) requires modification of existing policies as well as the current facilities lease agreement. In addition to those efforts, standards must be established to provide guidance to charter operators concerning the appropriate level of care of the buildings they lease, as well as a framework for compliance with those standards.

Thus far, a joint OPSB-RSD working group and the Facilities Task Force have focused on the lease requirements (a December Milestone) that should be included moving forward. Work is also underway on maintenance policies that will apply to OPSB Exceed Network schools, maintenance policies that will pertain to charter schools, as well as facilities planning policies that will apply to all OPSB-owned schools.

For several years the RSD has had a system in place to communicate maintenance requirements to charter schools through a Facility Policies & Procedures Handbook, and a process for monitoring compliance with those standards through facility inspections. OPSB is developing documents and a monitoring process based on the RSD’s proven success with that approach.

Early in the discussion of these document revisions, it became obvious that careful coordination of the language among policies, the lease, and the facilities handbook would be essential. That will require a first-reading of policy revisions at the January OPSB Board meeting. These documents are on schedule to be completed by the March 2017 Milestone deadline. This process will ensure that facilities lease contracts are in place for schools renewing charters for the 2017-2018 school year and those transferring over from the RSD.