



Fall 2017 Charter RFA Part 2 Orientation

August 16, 2017

Agenda



- ▶ Welcome & Introductions
- ▶ RFA Part 2 content & evaluation expectations
- ▶ Evaluation process overview & Applicant Response opportunities
- ▶ Questions & Discussion (2:00-2:30)

OPSB Fall 2017 Charter RFA Timeline (Tentative)



Fall 2017 Charter RFA Timeline

MILESTONE/TASK	DATE
RFA Release	July 21, 2017 – Part 1 August 1, 2017 – Part 2
Part 1: Information Session	11:00 a.m., July 25, 2017
Fluid Review Portal Opens	July 26, 2017
Part 1: Eligibility & Prospectus due	12:00 p.m., August 7, 2017
Eligibility Review presented to Applicants	August 9, 2017
Part 1: Prospectus Feedback Sessions	August 16, 2017
Part 2: Information Session	11:00 a.m., August 16, 2017
Part 2: Complete Applications due	12:00 p.m., August 31, 2017
Completeness Findings Resubmission due	5:00 p.m., September 6, 2017
Initial Independent Evaluator ratings / Request for Clarification presented to Applicants	October 2, 2017
Application Resubmission / Response for Clarification response due	12:00 p.m., October 13, 2017
Capacity Interviews	November 6 - 10, 2017
Final Independent Evaluation Reports presented to Applicants and OPSB staff	November 10, 2017
Applicant response to Independent Evaluation Report due	November 13, 2017
Public Hearing	Tentative: November 16, 2017
OPSB December Board Business Meeting – Presentation of Superintendent’s Recommendation ¹	Tentative: December 14, 2017



RFA Part 2 Content & Expectations

RFA Part 2 Sections



- ▶ Education Plan

- ▶ Organizational Plan

- ▶ Financial Plan

- ▶ Addenda (to be completed as applicable)
 - ▶ Experienced Operator
 - ▶ Virtual Schools
 - ▶ Corporate Partnership
 - ▶ High School
 - ▶ Transformation



Characteristics of a High-Quality Proposal

- ▶ Mission alignment
- ▶ Cohesion of elements
- ▶ Alignment between sections
- ▶ Sufficiently detailed
- ▶ Presentation of compelling evidence
- ▶ Demonstration of track record

Education Plan: Elements



- ▶ Executive Summary
- ▶ Academic Model
- ▶ School Leadership
- ▶ Curriculum & Instructional Design
- ▶ School Structure
 - ▶ Schedule
 - ▶ Supplemental Programming
 - ▶ Culture
 - ▶ Discipline
- ▶ Special Student Populations
- ▶ Family & Community Engagement

Education Plan: Evaluation Team Expectations & Critical Qs



Expectations

- ▶ Comprehensive
- ▶ Internally aligned
- ▶ Supported by budget expenditures and organizational model
- ▶ Likely to succeed with the anticipated population
- ▶ Viable plans for stakeholder engagement
- ▶ Evidence based

Critical Questions

1. Does the school structure support the execution of the curriculum and instructional strategies?
2. Are goals and expectations ambitious but realistic?
3. Does the applicant have sound plans for serving students with special needs?
4. Does the school leader demonstrate the experience, skills, and capabilities needed to manage the school?



Organizational Plan: Elements

- ▶ Organizational Charts
- ▶ Governing Board
- ▶ Advisory Bodies
- ▶ Grievance Process
- ▶ Staff
 - ▶ Structure
 - ▶ Hiring, Management, & Evaluation
 - ▶ Professional Development
- ▶ Performance Management
- ▶ Recruitment & Enrollment
- ▶ Facility
- ▶ Startup Plan

Organizational Plan: Evaluation Team Expectations & Critical Qs



Expectations

- ▶ Supports implementation of the educational program and achievement of vision
- ▶ Supports effective oversight, decision-making
- ▶ Reasonable assessment of operational needs
- ▶ Thoughtful plan for start-up, launch, ongoing operations

Critical Questions

1. Does the governing board demonstrate the depth and breadth of experience required for effective school oversight?
2. Is the organization well-structured for effective decision making?
3. Is the staffing plan reasonable and supportive of programming and operations?
4. Does the staffing plan clearly reflect the school's proposed growth model?
5. Does applicant have experience with non-academic operations?

Financial Plan: Elements



- ▶ Budgets
- ▶ Cash flow projections
- ▶ Budget narrative

Financial Plan: Evaluation Team Expectations & Critical Qs



Expectations

- ▶ Realistic revenue/expense projections with clear assumptions – start up through year five
- ▶ Spending priorities align with the school’s mission, educational program, management structure, PD needs, and growth plan
- ▶ Realistic cash flow projections aligned with marketing and recruitment plan
- ▶ Sound financial controls to ensure proper use of public funds and long-term viability
- ▶ Demonstrates financial planning and management capacity

Critical Questions

1. Does the budget accurately reflect the available funding sources?
2. Are projections for private funds realistic?
3. What contingencies are in place in the event that revenues are below expectations?
4. Does the budget include all the major cost centers associated with the operation of a charter school?
5. Does the budget reflect going market rates (e.g. salaries, contracted or inter-organizational services and fees, facilities)?
6. Are any potential financial conflicts of interest disclosed and explained?

Application Addenda



- ▶ Experienced Operator
 - ▶ Applicants applying on the existing operator track – one or more schools currently in operation, or partnering with an ESP currently operating one or more schools

- ▶ Corporate Partnership
 - ▶ Applicants intending to establish a formal corporate partnership, as defined in La. R.S. 17:3991.1

- ▶ Virtual Schools
 - ▶ Applicants where primary instruction (>50% of student time) will be delivered via technology

- ▶ Transformation
 - ▶ Applicants seeking or potentially willing to seek a match to operate an existing Orleans public charter school or school facility, which is subject to nonrenewal, revocation, or voluntary relinquishment by the existing chartering organization

- ▶ High School
 - ▶ Applicants seeking to start, transform or convert a school serving grades 9-12 in Orleans Parish



Part 2 Submission Reminders

- ▶ Submissions must be uploaded through Fluid Review
 - ▶ This process can take up to 1-2 hours for all RFA Part 2 elements – please plan accordingly!

- ▶ Late, improperly formatted, or too long submissions will not be accepted

- ▶ Use the template documents provided, and submit all documents in the requested file formats
 - ▶ PDF for all documents except for financial workbooks (XLS)

- ▶ For technical issues and all other concerns, email forrest_collins@opsb.us



Evaluation Process Overview



Proposal Goals: What Are Evaluators Looking For?

- ▶ Present a clear, cohesive, aligned plan for all aspects of school operation
- ▶ Demonstrate potential to produce high-quality outcomes for all students
- ▶ Demonstrate team capacity to execute the plan and deliver results
- ▶ Alignment with Fall 2017 Charter RFA Priorities
 - ▶ **Type 1 Transformations** with a targeted focus on re-enrollment of existing students and educating students with a similar at-risk population as the prior school
 - ▶ **Type 3 Conversions** of remaining OPSB direct-run schools



Independent Evaluation Team Composition

- ▶ Substantive areas of experience/expertise
 - ▶ Educational program
 - ▶ Organizational plan
 - ▶ Financial/business plan
 - ▶ New Orleans and Louisiana context

- ▶ The Evaluation Team will utilize the following process in reviewing all applications
 - ▶ Individual review
 - ▶ Team debrief
 - ▶ Request for clarification / Resubmission
 - ▶ Capacity Interviews / Scenarios
 - ▶ Recommendation
 - ▶ Review applicant response
 - ▶ Rebuttal

Independent Evaluation Team Ratings



Rating	Characteristics
Meets the Standard:	The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant's capacity to carry out the plan effectively.
Approaches the Standard:	The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.
Does Not Meet the Standard:	The response meets the criteria in some respects but has substantial gaps in a number of areas.
Falls Far Below the Standard:	The response is wholly undeveloped or significantly incomplete; demonstrates lack of preparation; or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.



Independent Evaluation Team Results

What the evaluation *is*:

- ▶ Recommendation report to OPSB district staff and School Board members
- ▶ Analysis of strengths/concerns
 - ▶ Final report is aligned to application plan elements

What the evaluation is *not*:

- ▶ A final decision
 - ▶ The district administration, Superintendent and School Board are not bound by the results of the independent evaluation
- ▶ A rank ordering/preference for one quality application over another

OPSB Evaluation & School Board Final Decisions



- ▶ OPSB district administration will forward to the Superintendent two reports in mid November
 - ▶ Results of the independent evaluation of each application, including all applicant responses and rebuttals
 - ▶ An Administration recommendation, which will be informed by the independent evaluation as well as
 - ▶ the district's own internal review of the application, and
 - ▶ an assessment of the applicant's alignment with district needs, as articulated in the Fall 2017 Charter RFA Authorizer Priorities

- ▶ The district administration, Superintendent and School Board are not bound by the recommendations of the independent evaluation team



Opportunities to Respond During the Application Evaluation Process

Opportunities to Respond



Applicant groups are afforded four formal opportunities to respond during the application evaluation process

1. Request for Clarification / Resubmission
2. Capacity Interview / Scenario
3. Response to Independent Evaluation
4. Public Hearing



1. Request for Clarification / Resubmission

- ▶ Timing:
 - ▶ Questions issued: **October 2, 2017**
 - ▶ Responses from applicants due: **October 13, 2017**

The Request for Clarification / Resubmission is an opportunity to respond to questions from independent evaluators in writing, based on their initial review of your team's submissions

- ▶ Divided by application section and subsection
- ▶ Submitted via Fluid Review



2. Capacity Interview / Scenario

- ▶ **Timing: November 6-10, 2017**
 - ▶ Applicants must be available during this date range, with invitations to interview and final date/time to be provided by no later than **October 16, 2017**

The interview is an opportunity for applicants to:

- ▶ Clarify the plan
- ▶ Address proposal gaps
- ▶ Address evaluator questions and concerns

What the interview is **not**:

- ▶ Formal presentation to evaluation team
- ▶ Opportunity to present new, written information
 - ▶ No documents will be accepted at the interview



2. Capacity Interview: Additional Details

- ▶ Maximum of 8 individuals per applicant team, including
 - ▶ Proposed school leader (required, if identified)
 - ▶ Proposed board members
 - ▶ CMO representative (strongly recommended, if applicable)
 - ▶ Other key individuals for the school
- ▶ Individuals should be collectively prepared to speak in detail about all application elements, including the educational, organizational and financial plans
- ▶ Lines of questioning will be specific to your application and team – interviewers will be evaluating responses for
 - ▶ Internal consistency (alignment)
 - ▶ External validity
 - ▶ Capacity of the applicant team to execute
 - ▶ Evidence of success (or potential for success)
- ▶ Interviews will be videotaped for future reference; as with all application materials, these recordings are subject to Louisiana Open Records Law



3. Response to Independent Evaluation

- ▶ Timing
 - ▶ Independent Recommendation Reports Issued: **November 10, 2017**
 - ▶ Applicant Responses Due: **November 13, 2017**
- ▶ Opportunity to correct *factual errors* in the Independent Recommendation Report
- ▶ No new information or attachments will be considered by either OPSB or the Independent Evaluation Team at this stage
 - ▶ The independent evaluation team will be afforded the opportunity to respond to any substantive issues raised
- ▶ No template will be provided
- ▶ Submissions via Fluid Review



4. Public Hearing

- ▶ **Timing: November 16, 2018**
(tentative – Nov. OPSB Business Meeting)
- ▶ The November 2017 OPSB Business meeting is currently designated as the public hearing regarding each charter application, as required by BESE Bulletin 126, §306.4
 - ▶ At its discretion, the Board may elect to conduct a separate public hearing for this purpose – if so, time and date information for this hearing will be publically noticed, and clearly communicated to applicants well in advance
- ▶ Applicant teams are welcomed to address School Board members and the Superintendent regarding their proposal at this time

OPSB Final Decisions



- ▶ Timing: **December 14, 2017**
(tentative – December OPSB Business Meeting)

- ▶ Final decisions on all applications will be made during the December OPSB Business Meeting
 - ▶ At its discretion, the Board may elect to call a special meeting for this purpose – if so, time and date information for this meeting will be publically noticed, and clearly communicated to applicants.

- ▶ Applicant teams may address the Board regarding their application in advance of the vote, following the procedures for public comment observed during Board meetings

Closing Reminders



- ▶ All application materials submitted to OPSB are considered to be public records, and are subject to dissemination under the provisions of state Open Records Law (La. R.S. 44:1 et seq).
- ▶ The RFA Applicant Code of Conduct prohibits any lobbying or attempt to influence the decision of School Board member(s) by an applicant, outside of the submitted application materials & public hearing process.
- ▶ All RFA deadlines are **firm & final** – out of fairness to all applicant groups, no extensions or other special considerations will be granted.
- ▶ All materials should be submitted via FluidReview, and in PDF format unless otherwise requested (financial templates should be in Excel format) – this is to your benefit, as well as for ease of review by evaluation teams.
- ▶ The quality of application materials is a reflection of the professionalism of your applicant group – formatting & presentation counts!

Contact Information



- ▶ For any questions or concerns regarding the Fall 2017 OPSB Charter School RFA or charter school application evaluation process, please contact

Forrest Collins, Director of New School Development
forrest_collins@opsb.us