



Unification Advisory Committee: December Quarterly Milestone Update

November 28, 2017

Agenda for today



- ▶ Unification Milestone Overview

- ▶ December Milestone Discussion
 - ▶ Charter School Accountability Framework
 - ▶ Citywide Services
 - ▶ Authorizing Approach
 - ▶ Facilities



Unification Milestone Update

OPSB is well positioned to complete all Unification Milestones



The Unification Plan established 34 Unification Milestones to complete prior to July 1, 2018

- ▶ Overall Progress
 - ▶ OPSB has completed 32 Unification Milestones

- ▶ December Unification Milestones
 - ▶ All 7 of the December Unification Milestones are complete

- ▶ March Unification Milestones
 - ▶ Two Unification Milestone remain and they are on track for completion by March 2018

We have adjusted the following Unification Milestones



The Unification Milestone deliverable dates below have been moved so that the deliverable date aligns with the work to be completed

Area	Milestone	Deliverable Date
Portfolio	Develop the School Performance Framework	Previous: September 2017 Milestone Present: March 2018 Milestone
	Ensure that existing & future OPSB policies regarding student equity, emergency management, enrollment, and school authorization as outlined by Act 91 are integrated into the School Performance Framework, charter accountability process, and other relevant process documents.	Previous: December 2017 Milestone Present: March 2018 Milestone
Facilities	Develop a plan for the transfer of all facilities from RSD to OPSB including which buildings will remain with RSD due to construction.	Previous: March 2018 Milestones Present: December 2017 Milestones
	Develop and implement standards and policies for capital repairs and replacements funded through the School Facility Preservation Program.	
	Plan for the development of the revolving facility loan fund and individual school facility accounts.	

December Milestone Progress



We have met all December Unification Milestones

Area	Milestone	Status	Complete	On Track
Citywide Services	Identify which citywide services and resources will be funded within the expected revenues for the unified school district.	<ul style="list-style-type: none"> OPSB and has identified the citywide educational service initiatives funded by recurring revenue streams 	✓	
	Determine the role of OPSB as a partner to non-profits that play critical roles in supporting citywide services.	<ul style="list-style-type: none"> OPSB's Equity and Student Services team have created a process document for managing critical non-profit relationships 	✓	
Portfolio	Ensure that facility and enrollment policies and processes (e.g. building utilization, enrollment target-setting) are aligned with the portfolio management process in order to increase access to high-quality public school options for New Orleans families.	<ul style="list-style-type: none"> OPSB's Authoring Approach was created with input from a school leader working group and was presented at the November 9th School Leader meeting 	✓	
Facilities	Develop policies and processes to secure property insurance that meet insuring standards for adequate coverage.	<ul style="list-style-type: none"> OPSB is actively establishing meetings with domestic and international underwriters. Adequate property insurance will be secured prior to Unification. 	✓	
	Develop a plan for the transfer of all facilities from RSD to OPSB including which buildings will remain with RSD due to construction.	<ul style="list-style-type: none"> RSD and OPSB facility teams have finalized a plan for the RSD to transfer all facilities to OPSB prior to July 1, 2018. 	✓	
	Develop and implement standards and policies for capital repairs and replacements funded through the School Facility Preservation Program.	<ul style="list-style-type: none"> Facilities policies HD, FE, FJ work in concert to provide operators with transparency on the process for capital repairs and replacements 	✓	
	Plan for the development of the revolving facility loan fund and individual school facility accounts.	<ul style="list-style-type: none"> Implementation plan shared at November 9th School leader meeting. Loan fund and individual accounts won't be accessed until 2021. 	✓	

March Milestone Overview



Work on March milestones is underway

Area	Milestone	Status	Complete	On Track
Portfolio	Develop the School Performance Framework	<ul style="list-style-type: none"> The CSAF proposal and associated OPSB Policy amendments will be presented for board approval in the spring 		✓
	Ensure that existing & future OPSB policies regarding student equity, emergency management, enrollment, and school authorization as outlined by Act 91 are integrated into the School Performance Framework, charter accountability process, and other relevant process documents.			✓



Charter School Accountability Framework

Charter School Accountability Framework Next Steps



- ▶ The Charter School Accountability Framework (CSAF) proposal will be revised and presented for board approval once we can engage stakeholders in discussions based upon data and outcomes of the state new accountability formula
 - ▶ LDOE officials have stated that such data likely will be available in early December

- ▶ Ongoing Stakeholder Engagement
 - ▶ OPSB continues to engage with stakeholders on the current draft CSAF
 - ▶ OPSB has also continued updating the CSAF based on written feedback from stakeholders

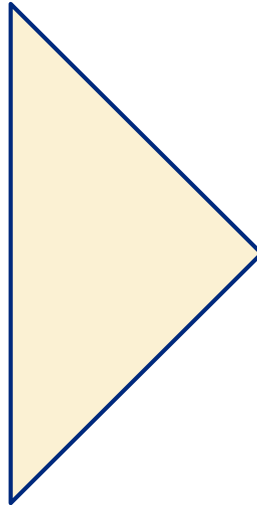


Citywide Services Update

Citywide Services Milestones- December 2017



Citywide Services and Enrollment December 2017 Unification Milestones



1

Determine the role of OPSB as a partner to non-profits that play critical roles in supporting citywide services, such as the New Orleans Early Education Network, YouthForce NOLA, and New Schools for New Orleans, including guidelines for any new potential partnerships

2

Identify which citywide services and resources will be funded within the expected revenues for the unified school district.

OPSB's Commitment to Equity



In developing its vision and goals for the unified district, OPSB has agreed upon a goal to advance equity for all students and families, which includes:

ACCESS



RESOURCES



OUTCOMES



The goal is for families to find a high-quality school that meets their children's needs, educators have what they need to help students succeed, and all students are prepared for civic, social, and economic success, regardless of race, income, or other factors

OPSB's Office of Equity & Student Services



OPSB's Equity & Student Services division works to ensure the district is

- Identifying the needs of the system, convening government agencies and partner organizations, and advocating for additional resources to best serve all students
- Using differentiated funding, citywide exceptional needs funds, and other avenues to ensure that the funding for schools and programs reflects the unique characteristics of students
- Working proactively to ensure that students and families who are often marginalized and disenfranchised are able to fully participate in all aspects of our educational system
- Managing a needs assessment process across internal and external stakeholders to analyze the needs of students and families attending public schools



1

Needs Assessment

- Reports and data collection on the efficacy of approaches schools are taking towards meeting the goals of each initiative, as well as identification of emerging needs

2

Policy, Planning, and Strategic Leadership

- Ongoing analysis of needs assessments and related policies and approaches to drive improvements within each initiative

3

Partnership Management

- Engaging with administrative divisions and external partners to advance key citywide education service initiatives. Ongoing partner evaluation and accountability is required to drive the work towards excellent and equitable educational opportunities and outcomes for all students.

4

Resource Allocation

- Consider existing resources and strategic decision-making processes for allocating resources that ensure efficient, effective, and quality service delivery and access for all students.

Partnerships Are Integral to School Success



In our decentralized system, schools leverage partnerships with organizations and service providers to meet the needs of students and families

Schools should not be alone in advancing student achievement

In certain circumstances, the School Board and its administration is both positioned and equipped to coordinate, facilitate, convene, and allocate resources with a variety of entities to help schools best meet students' and families' needs

Partnerships at Work



OPSB is currently engaged with several key partners who provide support, services, and strategic planning to schools, students, and families citywide. While not exhaustive, the below partnerships demonstrate both the depth and diversity of our partnership engagement.

Identified in
Unification Plan

Partner	Purpose
New Orleans Early Education Network (NOEEN)	Collaborative partnership between every publicly funded early education provider in the city
YouthForce NOLA	An education, business, and civic partnership to better prepare and connect New Orleans students to career pathways
New Schools for New Orleans (NSNO)	Strategic partner to direct support and coordinate solutions to citywide challenges
Center for Educational Excellence in Alternative Settings (CEEAS)	Provides educational services to students in pre- and post- adjudicated secure care at the Travis Hill Schools
Ed Navigator	Partners with local businesses to provide families ongoing support from enrollment to graduation

OPSB's Approach to Strategic Partnerships



Purpose

What does the partner intend to accomplish, and how does it fit within the district's legal responsibilities and strategic priorities?

Coordination

How does OPSB interact with the partner to most effectively meet a legal responsibility and/or strategic priority?

Evaluation

How do we know if the partner will do/is doing a good job at the intended purpose?

Sustainability

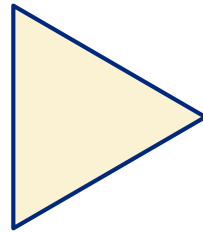
Can the current and future methods continue to have the intended impact?

Moving forward, we will continue thinking about the most effective ways to assess our partners supporting students and families.

Emerging/Ongoing Partnership Considerations



The Equity & Student Services Department's approach to partnerships continues to evolve to meet emerging needs and align partnerships with district resources. Additionally, we continue to consider:



Gaps or obstacles that prevent all students from receiving a full set of educational services

Existing, emerging, and future partnership engagements which meet these needs

Assessments of partners that evaluate the return on investment OPSB and others derive from the partner

Funding Citywide Educational Service Initiatives



The 2014 Cooperative Endeavor Agreement between OPSB and the RSD led to the development and funding of programs/initiatives to serve students with the most significant needs

It also highlighted the need to **increase** support and resources to programs already in place

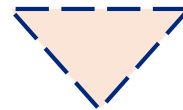
Cognitive and Therapeutic Supports

Drop-out Prevention

Students with the most severe disabilities

Location, identification, and evaluation of 2.5- 5 year olds with disabilities

Educational services to students in pre- and post- adjudicated secure care



New Orleans Therapeutic Day Program

Youth Opportunity Center

Citywide Exceptional Needs Fund

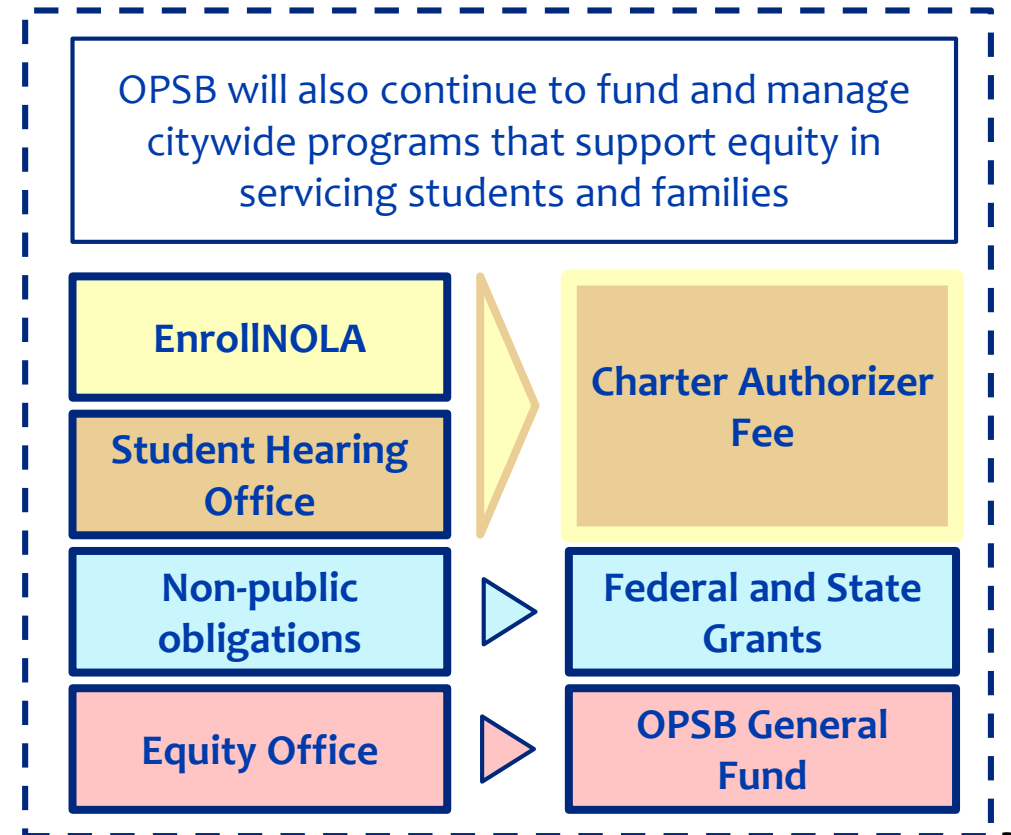
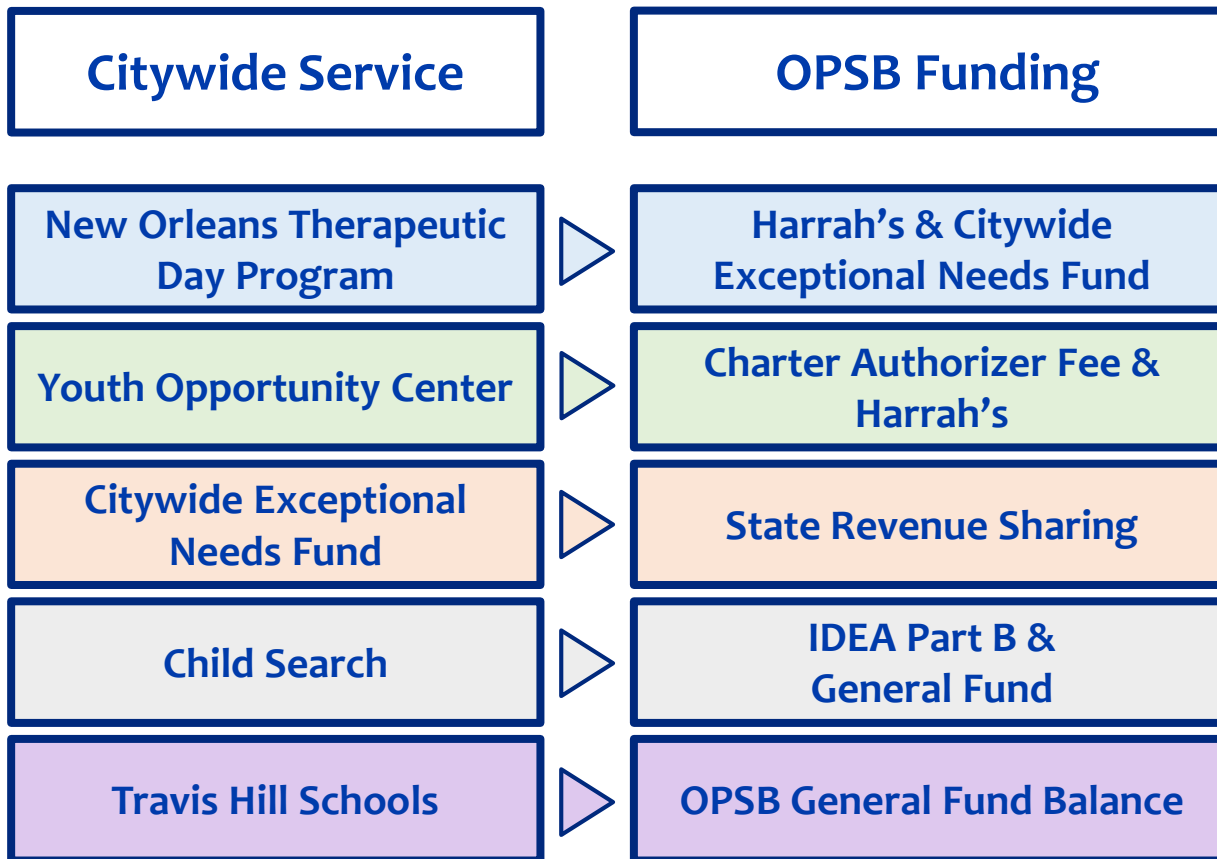
Child Search

Travis Hill Schools

Funding Citywide Educational Service Initiatives



In 2018-19, the unified school district will continue to support the identified citywide educational service initiatives with recurring revenue streams



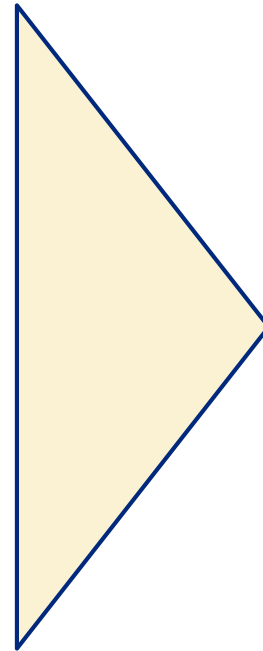
Future Funding Considerations



In addition to supporting educational service programs, the district has established a student funding formula that is equitably distributed to schools based on student characteristics

District's Student Funding Formula

- Student funding in Orleans is distributed to schools, based on student characteristics
- OPSB Policy DCBA requires engagement with School Board, school operators, and the public for any potential revisions
- Next potential revisions presented to the School Board and operators no later than January 31, 2019 for effect July 1, 2019



By no later than November 2018, OPSB can announce its intent to modify the current formula, but is required to distribute based on student characteristics.



Authorizing Approach

OPSB's Authorizing Guiding Principles



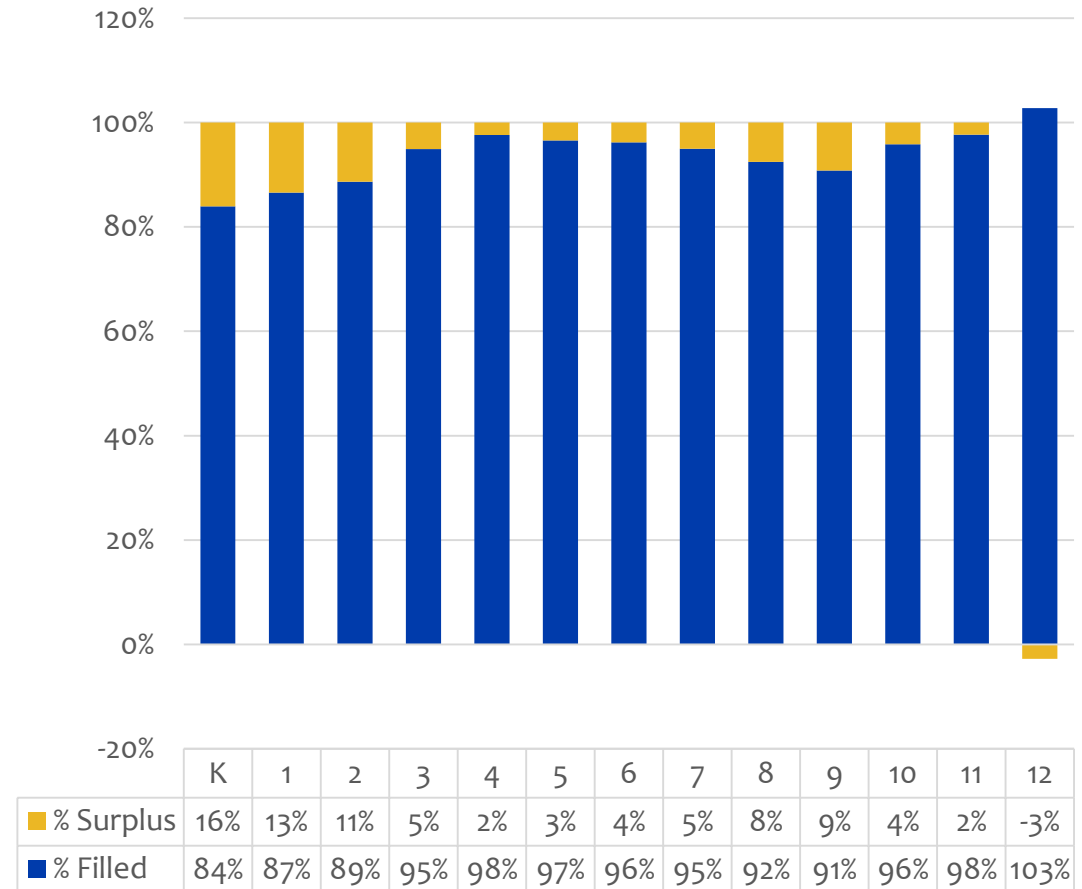
- ▶ **Families must have quality choices. For true choice to exist there must be:**
 - ▶ multiple high quality schools close to each child's home &
 - ▶ a surplus of seats for innovation, contingency, and choice is necessary at the citywide and sub parish levels.
- ▶ **Continued progress is a cornerstone of our authorization practice. To facilitate this we must:**
 - ▶ continue to authorize new schools;
 - ▶ augment our school development process to ensure selected operators have a plan for success;
 - ▶ preserve space in our system for innovation and existing quality operators.
- ▶ **Seat capacity can be managed cooperatively. As an authorizer we must:**
 - ▶ establish an explicit set of capacity targets;
 - ▶ provide data and support operators to act within the system in a way that supports a healthy system;
 - ▶ use demand and quality data to drive the allocation of seats in our system.



Quantity of Seats in our System

- ▶ The operation of a system of choice that includes mainly charter schools requires management of surplus capacity to ensure there are opportunities for
 - ▶ Choice: to allow families utilize the system and exercise choice
 - ▶ Contingency: Ensure we are reasonably prepared for circumstances within and beyond our control
 - ▷ to ensure we are able to act when schools do not meet renewal bar
 - ▷ To account for reasonable error in projections
 - ▷ Other Unknowns
 - ▶ Innovation: Adding different types of seats (especially new models) to the choices families have, while also acknowledging some of these options will not
 - ▷ Be selected by families
 - ▷ Meet renewal standard

**Excess Capacity by Grade Oct 1 2017
Preliminary**

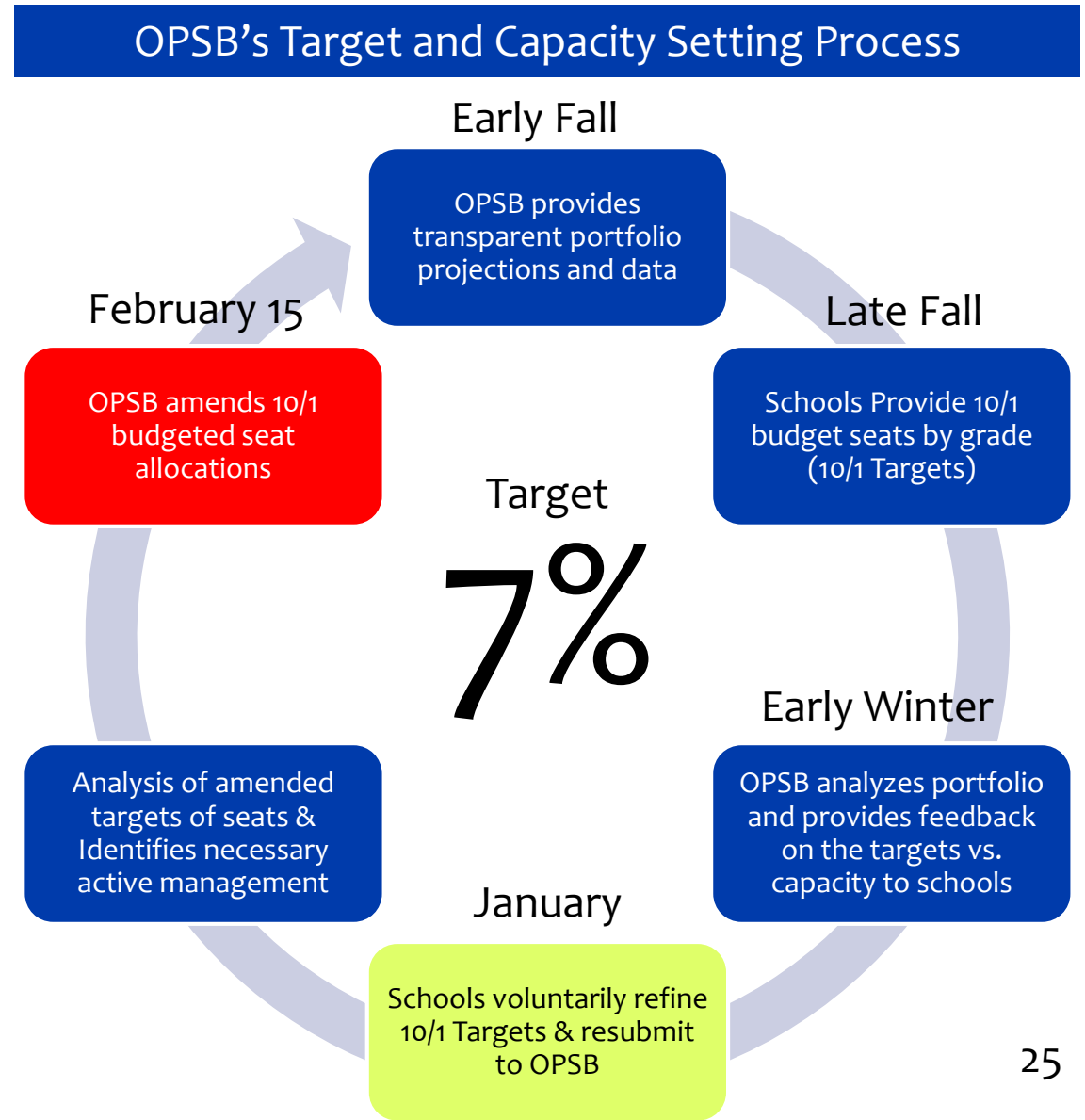




Managing Capacity in our System

Setting and Maintaining Enrollment Targets

- ▶ OPSB’s approach to managing capacity will be through Cooperative Management
- ▶ The administration is committed to managing system capacity targeting 7%
 - ▶ OPSB will not take action so long as the system remains above between 5% and 10% excess capacity, unless long-term portfolio needs necessitate additional authorization.
 - ▶ We intend to work toward 7% over a 2 to 3 year time horizon

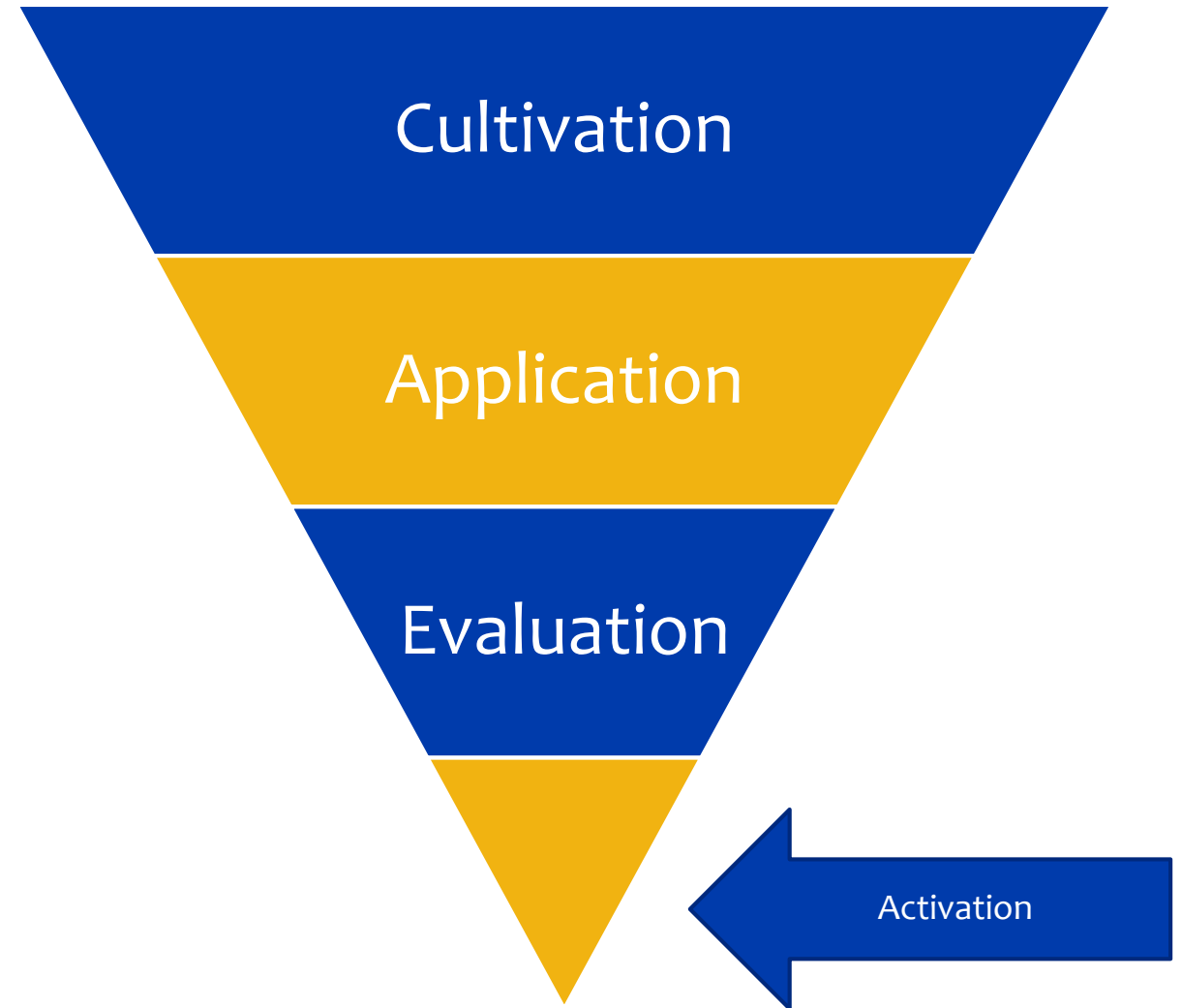


Ensuring a Pipeline of Quality Schools

Continued Authorization is a cornerstone of our approach



- ▶ The OPSB's charter application process is designed to be rigorous and schools meeting our high bar for approval should be recognized as such.
- ▶ Through OPSB's *Pipeline to Activation* process, we seek to:
 - ▶ Cultivate Applicants
 - ▶ Evaluate Applicants
 - ▶ Monitor Progress toward activation
 - ▶ Launch schools that meet identified priorities
- ▶ OPSB views the development of a strong ecosystem of supports as important and works with local partners to support school development priorities



Meet Family Demands through our New School Development Priorities



- ▶ Through a regular assessment of areas of programmatic need, the OPSB will seek to consistently communicate to our community and prospective school operators the types of applicants the OPSB seeks for our portfolio of schools.
- ▶ OPSB will seek input that will guide our New School Development Priorities which will be updated regularly. Areas of specific input include:
 - ▶ Analysis data to identify gaps in performance by subgroup
 - ▶ Analysis of data to identify of unmet needs in our city
 - ▶ Collaboration with parents and community organizations to identify types of school models and programs they would like to see in our city.
- ▶ The tri-annual OPSB New School Development Priorities will be included in each Charter RFA Package, featured prominently on the OPSB web site, and utilized in our prioritization of schools for launch and facility siting.
- ▶ New School Development Priorities will be presented to the board in early 2018

Ensuring Authorization Decisions are Clear & Transparent

A Framework for Transformation



- ▶ We are prioritizing the best interest of children and our community. Consistent with that we also must ensure the conditions exist for operators to be successful.

- ▶ To determine which schools are eligible for Transformation we engage in analyses seeking to take into account the many factors which must be considered before closing any school.

- ▶ Key questions to answer
 - ▶ Do we have sufficient capacity to absorb these students in the same catchment area or in their home catchment area?
 - ▶ Can all students receive placements in higher performing schools?
 - ▶ What is the long-term need for these seats?
 - ▶ What is the community need for this school?
 - ▶ What is the condition of the facility?

Clear Communications w/ Schools, Parents, and Families



- ▶ The OPSB intends to act quickly, consistently and with transparency in its interactions with families related to transformation decisions.
- ▶ Each year OPSB will:
 - ▶ Make decisions about the future of the school's operational status
 - ▷ Renewal decisions based on performance requirements
 - ▷ Transformation eligibility decisions based on its Framework for Transformation
 - ▶ Communicate with families directly regarding the future operational status of the site and if applicable a public hearing
 - ▶ Make final transformation and school closure siting decisions prior to the close of the OneApp Main Round
 - ▶ Partner with organizations to ensure all families impacted by a non-renewal decision have an opportunity to receive support with any transitions

Assessing the Health of our Portfolio through Analysis



- ▶ The OPSB will produce an *Annual Portfolio Analysis* each winter outlining the state of and projected future need of seats for our city and sub-geographies of our city.

- ▶ The Annual Analysis will include:
 - ▶ New School Development Priorities
 - ▶ Citywide Analysis of future need
 - ▷ Programmatic Needs
 - ▷ Grade Span Needs
 - ▷ Quality of Seats and upcoming renewal cycles
 - ▶ Sub-parish Geographic Analyses
 - ▷ Quality of Seats
 - ▷ Quantity of Seats
 - ▷ Diversity of Seats
 - ▷ Demand for Seats



Making change along these dimensions will take time

- ▶ **Quality:**
 - ▶ Over the next 2-3 years a number of schools will be subject to renewal and transformation decisions
 - ▶ We will need to work together to ensure sufficient high quality options exist for students impacted

- ▶ **Quantity**
 - ▶ Next month we will bring the board a full demographic analysis reflecting our current understanding of our demographic landscape including Kindergarten cohort sizes implications.
 - ▶ Initial Indications are that we have seen another decline in Kindergarten enrollment, on the other-hand we have larger cohort entering High School. Both of these areas are important as we plan for future authorizing needs.

- ▶ **Diversity**
 - ▶ Today we aren't proposing specific priorities but we are currently engaging in a series of listening activities to gather additional information from a variety of community and parent organizations.
 - ▶ New School Development Priorities will be presented to the board in early 2018.
 - ▶ It is our hope that updated priorities will result in quality applicants to bring additional, quality school models and programs to our system.



Facilities Update

OPSB/RSD Facility Transfer Plan



RSD and OPSB facility teams have finalized a plan for the RSD to transfer all facilities to OPSB prior to July 1, 2018.

Owner	Action	Deadline
RSD	Send lease termination letter to school leader outlining the last day that RSD insurance coverage is active.	May 1, 2018
RSD	Share with OPSB the previous year's building inspection results and finalized corrective action plan.	June 30, 2018 (Begin in March)
RSD	Share with OPSB any data on insurance claims and capital repairs that the RSD has completed within the last two years	
RSD	Share with OPSB all approved facility alterations requests on record.	
RSD	RSD will share with OPSB all contracts and service agreements provided to the RSD by the lessee as required by the RSD's lease.	June 30, 2018 (Begin in March)
RSD	RSD will cancel Property Insurance effective June 30, 2018	June 30, 2018
RSD	Provide charter operator with current and revised asbestos management plan and lead risk assessment	June 30, 2018 (Begin in March)
RSD	RSD will provide to OPSB and school leaders a list of all inventory submitted to the Louisiana Property Assistance Agency for transfer to OPSB. RSD will provide results of three (3) previous annual property certifications.	Inventory Submission: October 31, 2017 Previous Property Certification: June 30, 2018 (Begin in May)
RSD	RSD will execute a "Property Transfer MOU" between RSD and OPSB stating all legal terms of transfer.	June 30, 2018 (Begin in March)
RSD	RSD will share with OPSB construction documents related to construction projects at transferred schools.	June 30, 2018 (Begin in March)
OPSB	OPSB will execute leases with Charter Operators.	June 30, 2018 (Begin in April)
OPSB	Conduct training with Charter Operators concerning property management expectations and surplus process.	June 30, 2018

School Facility Preservation Program (SFPP) protects our students, funds, and facilities



▶ Why was SFPP needed?

- ▶ In our unique and decentralized school system, 98% of funding goes directly to schools.
- ▶ There was not a city wide plan to protect and invest in school facilities.
- ▶ Facility planning dollars should be separate from MFP funds.

▶ Purpose:

- ▶ Ensure students attend school in a healthy and safe environment
- ▶ Provide protected source of funds for future capital needs (not maintenance)
- ▶ Preserve Post-Katrina facility investments

SFPP funding provides the resources to support citywide facility management



- ▶ SFPP creates funding for the following:
 - ▶ Facility Office:
 - ▷ Funding for district level staff for compliance. (\$15 per student)
 - ▶ School Facility Accounts:
 - ▷ Individual account for capital repairs controlled by school operator.
 - ▷ Funding based on student enrollment (in law).
 - ▷ More per pupil funding is dedicated to the school facility account for students in buildings with limited previous investment (in law).
 - ▶ Revolving Loan Fund:
 - ▷ District controlled account for capital repairs that exceed a school facilities individual account.
 - ▷ More per pupil funding is dedicated to the revolving loan fund for students in New or Renovated buildings (in law).

- ▶ Expected Revenue:
 - ▶ \$35 M annually
 - ▶ Annual funding forecast: Based on 600 student enrollment

Building Type	Annual School Account	Annual Loan Fund Contribution
New or Renovated Buildings	\$228,000	\$180,000
Buildings with Limited Investment	\$318,000	\$90,000

Facility Assessments provide our team with a clearer picture of the facility repair need



- ▶ Over the last year the 48 schools that received minimal investment Post Katrina were assessed to better understand their repair and financial needs.
- ▶ These assessments tell us the following:
 - ▶ Current condition of facility components
 - ▶ When these components will need to be replaced
 - ▶ Expected cost of replacement
- ▶ What we learned:
 - ▶ By 2030 nearly **\$350M** will be collected for the preservation of ALL school facilities.
 - ▷ 85 School Facilities
 - ▶ By 2030 facilities NOT newly constructed or renovated have an approximate **\$800M** facility repair need.
 - ▷ 48 School Facilities
 - ▶ What we still need to define: facility repair need for first construction projects Post-Katrina



The Facility Strategy Working Group will drive the work ahead

- ▶ Purpose: Create a space to gather a diverse set of perspectives on key issues.
- ▶ Key Questions: January – May 2018
 - ▶ Review capacity and enrollment expectations
 - ▶ Define building quality goals
 - ▶ Create a framework for funding priorities
- ▶ Deliverable: June 2018
 - ▶ Present findings and next steps to OPSB Board
- ▶ How to get involved?
 - ▶ Join or nominate staff or Board Members
 - ▶ To join please email Eric Seling at Eric_Seling@opsb.us

OPSB has a plan to secure property insurance prior to Unification



OPSB has begun the process of securing property insurance for 2018 and we are well positioned to complete the process prior to July 1, 2018.

Owner	Action	Deadline
OPSB/RSD	Work with RSD to gather additional modifier data to drive down insurance rate.	January 31, 2018
OPSB	Release RFQ for multiple surveyors.	January 31, 2018
OPSB	Meet with domestic and international underwriters.	March 30, 2018
Contractor	Receive complete elevation surveys.	April 30, 2018
OPSB	Communicate projected property insurance rates to schools.	June 30, 2018
OPSB	Secure property insurance rates.	June 30, 2018
OPSB/RSD	Complete RSD facility transfer back to OPSB.	June 30, 2018