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| **Final application REVIEW 2022-2023** |
| **Proposed School Name (Commonwealth):** | Worcester Cultural Academy Charter Public School |
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| **Grades Served at Full Capacity:** | K-8 |
| **Number of Students at Full Capacity:** | 360 |
| **Proposed School Location:** | Worcester |
| **Proposed Opening Year:** | 2023-2024 |
| **Estimated Percent of Net School Spending (NSS) in Use in FY23[[1]](#footnote-2)** | Worcester: 6.9% |
| **Estimated Total Enrollment Available for Award in FY23 under the** [**18% Net School Spending (NSS) Cap**](https://www.doe.mass.edu/charter/enrollment/CapIncrease/) | Worcester: 2,906 (479 available under the 9% NSS cap) |
| **Mission Statement:**“Our mission is to educate, inspire, and uncover the inner genius of all learners through real-world and project-based experiences. In partnership with local cultural institutions, we provide Worcester students with learning opportunities that match their varied learning styles and needs and prepare them to be the cultural leaders of tomorrow.”**Proposed Growth Plan for First Five Years of Operation:**

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| **School Year** | **Grade Levels** | **Total Student  Enrollment** |
| First Year | K-4 | 200 |
| Second Year | K-5 | 240 |
| Third Year | K-6 | 280 |
| Fourth Year | K-7 | 320 |
| Fifth Year | K-8 | 360 |

The Department of Elementary and Secondary Education (Department) has compiled a summary of the evidence identified through the review of the charter application, the responses provided by the applicant group during the subsequent interview, and the statements and comments provided at the public hearing and during the public comment period. The summary below describes the evidence identified that addresses the application criteria and identifies the areas of the application criteria where limited evidence was provided during the application process.**Public Comment:**The application received comment **in support** during the public hearing and public comment process. At the public hearing, 13 individuals spoke in support of the proposed school, including parents; community members; one member of the applicant group; seven individuals affiliated with OSV or OSA; and the Executive Director of the Massachusetts Public Charter School Association, Tim Nicolette. An additional three individuals were not called to speak at the public hearing within the allotted time. The Department received written comment in support from 42 individuals and organizations. Twenty-two of the 42 letters of support reported an affiliation with an organization named in the application, including Old Sturbridge Village, or were written by a named member of the applicant group. The applicant group submitted an online petition consisting of 217 signatures, approximately 47 of the 89 Massachusetts residents who participated in the petition reported residency in Worcester.The application also received comment **in opposition** during the public hearing and public comment process. At the public hearing, approximately 29 individuals spoke in opposition to the proposed school including: Worcester Mayor Joseph Perry; State Representative David LeBoeuf; Worcester School Committee members Jermaine Johnson, Susan Mailman, Jermoh Kamara, and Tracy O’Connell Novick; Worcester Superintendent Dr. Rachel Monárrez; district administrators and educators; union representatives; parents; and community members. An additional sixteen individuals were not called to speak at the public hearing within the allotted time.The Department received written comment in opposition from 89 individuals, including resubmissions of comment provided at the hearing. Written comment in opposition was submitted by the Worcester mayor, superintendent, and members of the Worcester School Committee; Worcester City Councilor Etel Haxhiaj; State Representatives James J. O’Day, Daniel M. Donahue, John J. Mahoney, David H.A. LeBoeuf, and Mary S. Keefe; Senators Anne Gobi, Robyn Kennedy, and Michael O. Moore; Kristin Waters, chair of the education committee of the Worcester NAACP; the board of directors of the Worcester Education Collaborative; and Lisa Guisbond, executive director of Citizens for Public Schools, in addition to members of the public and current or former employees of Worcester Public Schools.  |

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| **Mission (I.A.) and Key Design Elements (I.B.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The mission and key design elements define the purpose and specialized focus of the proposed school as well as its potential value. Within the application and during the interview, the applicant group described the EL Education school design that will be implemented at the proposed school, including the use of “extended, interdisciplinary Learning Expeditions and field work at sites across Worcester County,” in addition to learning within the classroom, with the goal of students becoming “articulate communicators, critical thinkers, and skilled problem solvers who care for themselves, those around them, and their community.” Components of the mission and key design elements are reflected throughout the application.
* During the applicant interview, members of the applicant group described the meaning of “cultural leaders of tomorrow.” Applicants reported that students will develop skills, talents, self-esteem, and self-efficacy through the learning experiences at the proposed school which will serve to effectively engage students in their own education and development.
* The proposed school’s key design elements are aligned with the mission and reflected throughout the application. The two key design elements (partnership with EL Education and relationships with “Central Massachusetts Expedition Institutions”) are explained, described, and incorporated into the proposed school’s design and implementation of the proposed educational program. The school will contract with EL Education, a school support organization, for services that will support implementation of the school model, including curriculum, professional development, and coaching for educators. The school will partner with Central Massachusetts Expedition Institutions to implement Learning Expeditions, an essential component of the educational model.
* The Department has received correspondence from two cultural institutions in Worcester that would be involved in the Learning Expeditions described in the charter application: the Hanover Theater and Conservatory for the Performing Arts and the EcoTarium. The organizations describe their willingness to partner with the proposed school if chartered. Old Sturbridge Village, a living history museum in central Massachusetts, would also be involved in the Learning Expeditions at the proposed school. A third Worcester organization, Joy of Music, Worcester’s Community Music School, submitted a letter of support.
* The mission and two key design elements reflected the group’s core beliefs and values. The application also described five commitments as part of the applicant group’s underlying beliefs and values: community, high-quality work, real-world applications of learning, cultural competency, and continuous improvement.
* The applicant group proposes to replicate aspects of the Old Sturbridge Academy Charter Public School (OSACPS), a K-8 charter school in its sixth year of operation. The proposed school will have a similar management relationship with Old Sturbridge Village, LLC (OSV), including collaboration in Learning Expeditions.
* The application described how the proposed school distinguishes itself from other options available in the proposed charter region. The application highlighted the resources available through the proposed Expedition Institutions and their integration into the school’s curriculum and instruction. The frequency and scope of the Learning Expeditions distinguishes the school’s approach from other educational options. The application also described the ways in which EL Education will support effective implementation of the proposed school model, including EL Education’s English language arts curriculum and community structures such as Crew and Town Meeting, and provide ongoing support to school leadership and faculty during the charter term.
* The application described key academic and non-academic goals for students and provided examples of how the school’s success will be measured. The application described academic goals for student performance as “above average growth or meet/exceed grade-level expectations in English language arts, math, science, social studies, and the arts.” The application also described academic and non-academic goals through qualitative measures, such as the development of specific habits of character and the use of student-led conferences in all grades and student presentations in grade 5 and 8 to demonstrate student learning and development to families and members of the school community.
* The application described several specific ways in which the proposed school will collaborate with the public school districts from which it enrolls students. The draft accountability plan indicated the intent to “identify best practices, establish a school partner, and collaborate with the school partner to disseminate Learning Expeditions or project-based units” with the ultimate goal that the school partner will implement Learning Expeditions or project-based units from the collaboration by the fifth year of the charter term.
 | * The mission statement did not clearly communicate student outcomes aligned with high academic standards and student success as described in other areas of the application. The mission statement focused primarily on inputs and provided limited insight into the standards and expectations for student success based on the educational model.
* The application provided several goals for the school that are consistent with the mission and generally aligned with the two key design elements. While the proposed goals identified key pieces of evidence regarding how the proposed school will monitor the implementation of its design and student performance, additional development is necessary to ensure that goals demonstrate rigor and relevance to the proposed mission and educational program.
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| **Description of the Community to Be Served, including Enrollment and Recruitment (I.C.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * In the application and during the interview, the applicant group described specific aspects of the proposed educational program that were informed by input from families or other Worcester stakeholders, such as small class sizes; art, music, and world languages; early academic and social-emotional interventions; and high quality curriculum and instruction with hands-on project based learning.
* There are currently two Commonwealth charter schools located in Worcester, a regional K-12 school a single district K-8 school. During the 2022-23 school year, approximately 1,949 Worcester residents attend Commonwealth charter schools, including three charter schools located outside of Worcester. After the completion of admission lotteries for the 2022-23 school year, charter schools reported 740 unduplicated Worcester residents were waitlisted for enrollment, the seventh highest unmet demand in the state. On average over the past six years, approximately 756 students from Worcester were waitlisted annually.
* In the application and during the interview, the applicant group outlined their on-going efforts to recruit students, including door-to-door canvassing in communities, digital marketing campaigns, and marketing through community agencies and organizations.
* The applicant group plans to open immediately in the 2023-24 school year, serving 200 students in grades K-4. The proposed growth plan of five years will provide the school with four years of MCAS data at the time of its first renewal.
* The application and draft enrollment policy described the proposed school’s intention to exceed backfilling requirements by filling vacancies through grade 8.
* In the application and during the interview, the applicant group provided evidence of preparation for March 2023 pre-enrollment. During the interview on January 6, 2023, the applicant group reported that 73 intent to enroll forms had been completed for the proposed 2023-24 school year. The 73 forms included 30 applications for kindergarten, 11 applications for first grade, 7 applications for second grade, 15 applications for third grade, and 10 applications for fourth grade. The applicant group has proposed an initial total enrollment of 200 students in grades K-4 during the first year of operation.
* The application contained a draft recruitment and retention plan containing general and targeted strategies for the anticipated student population. The plan described the use of translated recruitment materials, coordination with local organizations and community events to inform families of the proposed school, and the use of social media and direct mailings to raise awareness of the proposed school. The plan also described aspects of school programming that will support student retention and limit attrition, including staffing and programming to meet student needs, and parent engagement within the educational program and outside of the school day through special education and English learner parent advisory councils and parent council.
* The application contained a draft enrollment policy and application for admission. The draft policy and application clearly communicated the proposed application deadline and date of the admissions lottery in accordance with Department requirements for pre-enrollment reporting by March 15, 2023. The Department identified only a few minor concerns for revision. A school’s enrollment policy and application for admission are subject to review by the Department and approval by the Commissioner.
 | * No major concerns based on the application criteria.

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| **Overview of Program Delivery and Curriculum and Instruction (II.A. and II.B.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application described a traditional 180-day school year and a six hour school day with opportunities for student learning aligned with the proposed mission and key design elements.
* The application described a school day that is differentiated for grades K-5 and 6-8. The school day included four 60 minute instructional blocks daily in core content areas, with additional blocks for a daily advisory period called Crew, daily enrichment or supplemental instruction blocks, and rotating specials in wellness/physical education, health, visual arts, and music for all grades, with Spanish language instruction beginning in grade 6. The school day included a weekly two hour instructional block for Learning Expeditions or field study in each grade.
* The application described a variety of strategies to ensure academic success for all students, including students struggling to meet performance standards.
* The school day included opportunities for push in or pull out services throughout the day for English as a Second Language (ESL) instruction or special education services.
* The application cited research studies of the impact of the EL Education model, inclusive of curriculum and teacher professional development, on teacher’s instructional practices and student outcomes in English language arts. The application also cited research regarding the selection of its mathematics curriculum and assessment, i-Ready Classroom Mathematics (i-Ready) and enVision Mathematics (enVision).
* Based upon the staffing model described in the charter application, there are two classroom teachers per grade, with generalists in grades K-5 and content area specialists in grades 6-8 who teach English language arts and social studies or science and mathematics. The application described the working conditions of educators, including at least four blocks for planning and preparation (prep) per week, with individual prep twice a week and common planning periods with grade level teams and student support teams (special education educators and ESL educators once a week each). There are no preps scheduled for educators on the days of Learning Expeditions.
* The application reported that Learning Expeditions will be used to support most of the science and social studies instruction within grades K-5. The application also noted that any social studies or science standards unable to be incorporated into a Learning Expedition will be taught within a separate unit or lesson. The application described the use of stand-alone social studies and science classes for students in grades 6-8.
* The application described the methods that will be used to ensure the use of high quality instructional materials at the proposed school. The application has identified high quality curricular materials as reported by the Department’s CURATE initiative and EdReports. The Department’s CURATE reports identify EL Educations’ Open Up Resources ELA curriculum for grades K-2 and grades 6-8 as meets expectations while its same curriculum for grades 3-5 partially meets expectations, indicating the need to adapt or supplement materials. The Department’s CURATE reports identify Curriculum Associates’ i-Ready for grades K-5 as meets expectations and Savvas’ enVision Mathematics for grades 6-8 as partially meets expectations, indicating the need to adapt or supplement materials. The Department’s CURATE reports identify Amplify Science for grades 6-8 as meets expectations. The application indicated that the social studies curriculum will be internally developed by administrators and teachers.
* The application provided a general overview of the development and ongoing improvement and refinement of curriculum. The application described the individuals involved in the curriculum development during the pre-operational period and the EL Education tools used to develop units and lesson plans from curriculum maps. The application also noted the involvement of educators in the ongoing review of curriculum once the school is in operation.
* The application described proposed structures for regular, frequent collaboration and professional development to improve implementation of the curriculum and instructional practice. The proposed school schedule included regular common planning periods for grade level faculty, and collaboration among content area educators, ESL teachers, and special educators. The application stated that three teams, consisting of administrators, educators, and specialists, will be formed to focus on different areas of oversight and support continuous improvement of the education program through effective collaboration.
* The application provided for additional funding to support educators in obtaining necessary Sheltered English Instruction (SEI) teacher or administrator endorsement.
* The application described a variety of professional development (PD) opportunities for staff, including a total of 17 dedicated days before, during and after the school year, in addition to daily 60 minute prep or collaboration periods. Professional development opportunities will be initially guided by the knowledge and skills required to implement the school’s design with fidelity and further refined based on teacher input, classroom observations by administrators, and student work and performance.
* The application reported that the track record of performance of schools within the EL Education network, for all students and student groups, is evidence of the ability of the proposed curriculum and instruction to meet the needs of students. During the initial application stage, Commissioner Riley determined EL Education, a school support organization, to be qualified as a proven provider based upon a review of compiled school performance data. There are enough seats available in Worcester under the 9 percent NSS cap to accommodate the proposed school’s maximum enrollment with no other application under consideration; a proven provider designation is not required.
 | * In the application and during the interview, the applicant group indicated that implementation of the integrated arts program will evolve over time. During the first year of operations, curriculum related to visual arts, music, and drama will be incorporated into Learning Expeditions and facilitated by the Learning Expeditions coordinator. During the second year of operations, once content specialist teachers are hired, integrated arts programming will be implemented through stand-alone classes.
* The application provided general information regarding the specific strategies that will be used to support high standards of achievement for all students. The application described standards-based learning objectives, project-based learning, classroom routines, use of tiered interventions, and collaboration amongst educators using student data to identify and address student needs.
* The application provided limited research evidence regarding the educational model’s ability to serve the needs of students identified as requiring special education services and students identified as English learners.
* The proposed school is intending to replicate many aspects of the OSACPS educational program and is proposing to employ the same leadership team. OSACPS has enrolled an increasing number of students requiring special education services with approximately 20 percent of its student population identified as students with disabilities in 2022, similar to Worcester’s enrollment levels (21.1 percent in 2022-23). OSACPS enrolls a substantially lower percentage of students identified as English learners than anticipated for the proposed school. During the six years of its operation, the OSACPS student population included between 3.6 percent to 6.5 percent English learners. Worcester Public Schools’ student population was 30.4 percent English learner in 2022-23.
* While the application indicated the intent to implement the Massachusetts Model Evaluation system, the application provided limited information regarding the evaluation of administrators and teachers.
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| **Student Performance, Assessment, and Program Evaluation (II.C.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application described an assessment system generally aligned to the school’s mission and key design elements. The proposed assessment system included student-centered approaches such as work products from Learning Expeditions, student-led conferences, and portfolio presentations in fifth and eighth grades.
* Portfolio presentations are used in all grades to showcase student development in the three areas of EL Education school design: “mastery of knowledge and skills, character, and high-quality work.” During the biannual student-led conferences, students share a portfolio of their work with their families. During fifth and eighth grade, students present a portfolio of their work to members of the school community to demonstrate their development and academic achievements.
* The application identified a variety of assessment tools to measure student progress on academic and non-academic goals and to modify instruction to address students’ needs.
* The application noted that student grade promotion requires demonstration of proficiency on 70 percent of learning standards in ELA, math, science, and social studies. The application also contained a four point rubric to communicate student performance on individual learning targets.
* The application described the staff involved and processes to monitor school progress towards its academic and non-academic goals as well as actions to revise the educational program or implement professional development as needed.
* The application contained a draft accountability plan with objectives and measures related to the mission, key design elements, and dissemination. The draft accountability plan will require additional revision to ensure that selected measures and identified data will effectively address Department expectations*.* This work will take place during the first year of operation. All accountability plans require approval by the school’s board of trustees and the Commissioner.
 | * The application provided a general description of the proposed school’s policies and standards for promotion and graduation. The description does not fully explain how the school will measure progress in developing students who are “articulate communicators, critical thinkers, and skilled problems solvers” as described in the EL Education school design. Grades will be organized into three “learning families” consisting of kindergarten, grades 1-4, and grades 5-8. The application contained sample exit standards for the three learning families which do not fully demonstrate expectations for student outcomes.
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| **Supports for Diverse Learners (II.D.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application demonstrates knowledge regarding policies and procedures to serve English learners and students with disabilities in alignment with law, regulations, and Department published guidance.
* The application provided a clear description of the processes and procedures the school will use to identify, assess, and serve students who are English learners (ELs).
* The application also provided a clear description of the processes and procedures the school will use to identify, assess, and provide specialized instruction to each student in need of special education services.
* During the applicant interview, the proposed principal and proposed director of special education described their relevant experience in overseeing programming related to special education and English language education.
* The application described a continuum of services to effectively meet students’ needs and in alignment with Massachusetts Tiered System of Supports. The proposed staffing plan included school adjustment counselors, school psychologists, an occupational therapist, and speech and language pathologist with additional plans to contract for physical therapy services.
* The application contained a new English learner education program proposal for Department approval prior to implementation as required. The application and program proposal described the implementation of a Sheltered English Immersion program.
* The proposed leadership team currently oversees implementation of the English language education program and special education programming at OSACPS. The school is in compliance with program requirements as determined by the Department’s Tiered Focused Monitoring (TFM) review. The Department’s [Office of Public School Monitoring](https://www.doe.mass.edu/psm/tfm/reports/) conducted a Tier 1 TFM review at OSACPS in March 2021. Tier 1 reviews are conducted at schools where data points indicate no concerns with compliance and performance outcomes. The outcome of the visit was zero findings in special education and civil rights. The Department’s [Office of Language Acquisition](https://www.doe.mass.edu/ele/cpr/) conducted a Tier 2 TFM visit at OSACPS in April 2021. Tier 2 reviews are conducted at schools where data points indicate low risk on compliance and performance outcomes. The outcome of the visit was zero findings in English language education.
 | * Based upon the proposed salaries for educators, it is unclear whether the proposed school will be able to recruit qualified staff for positions such as ESL teachers (salary not specified) or special education teachers ($64K average).
* The application reported that one ESL teacher, who serves as a coordinator of English language education programming for 25 percent of their duties, will be responsible for the development of an ESL curriculum. It is unclear what resources and professional development will be available to support their success.
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| **Culture and Family Engagement (II.E.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application described strategies and school structures for building a school culture and supporting family engagement that was consistent with the mission.
* The applicant group proposed to implement an inclusive and welcoming learning environment through the implementation of Crew programming, and the development and implementation of habits of character.
* All students will participate daily in Crew, a morning and afternoon meeting where a small group of students meets with an adult in the school. The meeting is designed by EL Education to facilitate relationship building and monitor academic progress and character development. Other structures for relationship-building include various schoolwide activities and exhibitions for sharing student work.
* The application described the approach to habits of character to be similar to OSACPS. The founding faculty will collaborate on the development of the 4-6 habits. At OSACPS, the five habits of character are: courage, collaboration, stewardship, perseverance, and high-quality work. The application described how students identify character goals related to the habits of character, monitor their progress over the school year with the support of their Crew teacher, and share their progress through student presentations, such as student-led conferences with families.
* The school will establish common expectations and protocols around student behavior. The application described how the proposed school would assess and systematically address any disparities in the implementation of discipline practices among student groups. The application indicated that a leadership team inclusive of the school counselor and teacher representatives would regularly review behavior and discipline data using a tool developed by the school to review implementation and data across student groups. The application also indicated the use of stakeholder surveys for families and staff to obtain feedback on policies.
* The application provided a variety of parent engagement strategies to ensure families are active members of the school community and engaged in their child’s education effectively. Strategies included a variety of events within and outside the school day, including student-led conferences, Learning Expedition evenings, Family Crews, volunteer opportunities, and various parent advisories (SEPAC and ELPAC) and the parent council.
* The application also reported the plan to supply breakfast, lunch, and snack to students.
 | * The application did not clearly describe the proposed school’s plans for the outdoor space or physical education space. The application stated that the school will have use of a nearby gymnasium facility, but the school finances section noted that current financial planning did not include the additional lease of an auditorium/gymnasium facility at the proposed location.
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| **Capacity and Governance (III.A. and III.B.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application summarized the experience and qualifications of each of the eight proposed board members, the proposed employees, and representatives of partner organizations, EL Education and OSV. The applicant group has experience implementing the proposed educational model. Members of the applicant group have skills and experience aligned to the school design and reflective of the capacity needed to implement the proposed charter school.
* The composition of the applicant group included proposed board members with backgrounds in law, financial management, early childhood education, K-12 education, K-8 administration, higher education, youth services, human resources, non-profit management and governance, and public governance at the state and local levels, including governance roles at charter schools and cultural organizations.
* Four members of the proposed board of trustees have experience as charter school trustees at existing schools relevant to the current proposal. Two current OSACPS board members will serve on the proposed school’s board of trustees as board chair and treasurer. An additional two proposed board members previously served on the board of trustees of the two Commonwealth charter schools located in Worcester.
* Members of the applicant group report connections to the Worcester community. Three of the proposed board members reside in Worcester, including a former Worcester city councilor; an additional four board members have various long-standing connections to Worcester, including their childhood hometown, the location of their employer, and volunteer involvement in varied Worcester organizations that serve children and families. The proposed principal is also a Worcester resident.
* The application demonstrated knowledge of general governance practices, such as officer roles and responsibilities, board committees, policy development, and the recruitment and selection of new board members.
* The proposed school’s governance model will include the involvement of family members through parent council and parent advisory councils for special education and English learners (SEPAC and ELPAC). The proposed board of trustees also included a parent representative nominated by the parent council to serve on the board.
* OSV will provide substantially all educational services to the proposed school and EL Education will help in program and curriculum design and staff professional development.
* The application described the board’s authority over the proposed school, the principal, and the management relationship with OSV. The principal is selected, hired, and evaluated by the board of trustees. The draft management contract also described the advisory role of OSV in the selection, evaluation, and termination of the principal.
* The draft management contract between the proposed school and OSV described the board’s responsibilities to oversee and evaluate the performance of OSV. The draft management contract contained provisions describing the board’s authority to terminate the management contract if OSV does not fulfill its contractual commitments or meet expectations for school performance.
* The application included draft bylaws generally aligned with Department guidance and expectations. The Department identified a few minor concerns for revision or removal. For example, the application described four standing committees that are not incorporated into the bylaws. Bylaws are subject to review by the Department and approval by the Commissioner.
 | * The application provided limited information regarding the succession planning for board officers.
* It is unclear why the applicant group has proposed to include the proposed executive director, an OSV employee, as a non-voting member of the board of trustees. No similar arrangement exists at other Massachusetts charter schools operating under a management contract.
* Two members of the proposed board of trustees, who also serve on the OSACPS board of trustees, are members of the Overseers of the Old Sturbridge Village, a group of over 100 individuals who support the mission of the museum.
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| **Management (III.C.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application included an organizational chart that encompasses employees of the school, the board of trustees, and the management organization at year one of operations and at full capacity. The principal and the executive director report to the board. The principal, an employee of the proposed school, provides day-to-day management over school operations. The executive director, an OSV employee, provides services under the proposed management contract, including management of business and operational services to be provided by OSV to the school, and management support to the principal. This type of arrangement is found at other Massachusetts charter schools, including OSACPS, with OSV as the management organization, and Community Day Charter Public School, with the Community Group as the management organization. The proposed school’s leadership team will also include a vice principal and part-time director of special education. The principal, vice principal, and director of special education will oversee all school staff.
* The applicant group included the proposed principal and the proposed director of special education. The application named the proposed principal and proposed director of special education as members of the founding group with resumes and questionnaires submitted as part of the application; their proposed roles were clarified during the interview process. During the interview, the applicant group described the selected individuals’ professional backgrounds and the reasons they were selected for their proposed role.
* The proposed principal is the current and founding principal of OSACPS with prior experience as an educator in Fitchburg Public Schools. The proposed director of education is the current director of special education and student support services at OSACPS with prior experience as a director at Southern Worcester County Educational Collaborative. The proposed principal would transition from OSACPS to the proposed new school as a full-time employee, the proposed director of special education would be employed by both schools part-time.
* The application provided a staffing plan aligned with the proposed educational program and school operations, including Learning Expedition Coordinators. All school staff described within the application are employees of the proposed school, except for the executive director who is an employee of OSV. The proposed executive director will provide services to the school through the management contract.
* The application discussed the school organization, its reporting structures, and the plans for how the school will make key organizational decisions. The application described an approach to decision-making that incorporates school stakeholders and distinguishes between decision-making at the board and school levels of the organization.
* The application described the desired qualifications and working conditions for staff. The applicant group indicated the intent to recruit a diverse teaching staff and implement culturally competent teaching practices.
* The application described the qualifications and attributes of an ideal teacher for the proposed school and described plans to recruit and retain teachers with these attributes. OSV’s director of diversity, equity, inclusion, and access will assist the school in the recruitment of teachers reflective of the anticipated student population.
* OSV, the proposed education management organization, will provide administrative services to the school related to facilities, food services, human resources, development, information technology, faculty and student recruitment, and financial services. The proposed management fee is seven percent of the school’s total tuition revenue over the first charter term. The fees for school management contracts vary in Massachusetts from seven percent to fourteen percent of tuition revenue. During the pre-operational period of four months, the proposed school has negotiated a flat fee for OSV’s services. The application contained a draft of the proposed management contract which is subject to review by the Department and approval by the Board of Elementary and Secondary Education.
* In the application and during the interview, OSV described the additional capacity at OSV to provide services to the two charter schools in addition to museum operations. OSV reported several new or expanded roles at the museum related to financial management, human resources, and administration, as well as newer roles targeted to providing services to the schools and their boards of trustees, such as the director of charter school strategy and planning and the director of diversity, equity, inclusion, and access.
 | * The proposed leadership team for the proposed school are currently employed by OSACPS. During the interview, the applicant group indicated that an experienced candidate for the principal role at OSACPS has been identified. It is unclear how the transition will impact the opening procedures process for the proposed school which plans to open in the fall of 2023 after a six-month planning period.
* While the draft management contract delineated the different responsibilities of the principal and OSV under the board of trustees’ oversight, the application did not consistently distinguish between the authority of school leadership and OSV leadership, who both report to the board of trustees, in all areas of the application. For example, the application stated that personnel decisions by the principal must be approved by the executive director which is inconsistent with language in the draft management contract.
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| **Facilities, Student Transportation and Finances (III.D. and III.E.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The applicant group has identified a potential facility in the Grafton Hill neighborhood, a former parochial school. The application described the suitability of the site and its proximity to Expedition Institutions. OSV, the proposed management organization, is currently leasing within the proposed site to support community outreach during the charter application process. If the proposed school is awarded a charter, any lease negotiated by the board of trustees must ensure the boards’ authority over school operations and the school’s autonomy from any third parties. The Department guides all new charter schools to obtain legal counsel prior to execution of any contracts or agreements, such as leases, and will receive a copy of the executed lease during the opening procedures process.
* The applicant group indicated plans to use district transportation for Worcester residents at the beginning and end of the school day.
* The application demonstrated knowledge of financial management and fiscal controls. The applicant group states that the proposed school’s fiscal controls will align with the Department’s [Recommended Fiscal Policies and Procedures Guide](https://www.doe.mass.edu/charter/finance/auditing/FPPguide.docx) and practices implemented at OSACPS. The application also described board oversight and monitoring through monthly finance committee meetings and reports by the treasurer at board meetings.
* OSV will provide business services to the proposed school aligned with current services provided to OSACPS. OSACPS has demonstrated strong financial management, with the majority of its indicators on the Department’s [financial dashboard](https://www.doe.mass.edu/charter/finance/dashboard/) identified as low risk. OSACPS has had unqualified audits with no findings or concerns over its first charter term (FY2018-FY2022).
* The application summarized financial forecasts from the school’s start-up phase through its fifth year of operation. The application defined and gave reasonable support for most assumptions behind projections. The budget and cash flow projection, including narratives, were detailed and comprehensive. The applicant group was responsive to feedback provided at the initial application stage regarding tuition assumptions.
* The applicant group demonstrated conservative financial planning and has taken several steps to mitigate risk, including conservative assumptions regarding tuition revenue and federal grant funding, and earmarking a portion of revenue for contingency planning.
 | * The proposed salaries for educators are low (average $61K) and may impact the school’s staff recruitment and the long term sustainability of the school’s staffing plans.
* If the applicant group does not recruit a student population comparable to Worcester Public Schools, its revenue assumptions will fall short of projections and will create challenges in terms of financial viability. The applicant group has taken steps within its financial planning to mitigate these financial risks.
* The applicant group’s financial assumptions regarding building improvements may be underestimating costs for preparing the proposed facility for occupancy. The applicant group has projected $300K for necessary renovations. During the interview, the applicant group indicated that bathroom renovations are the primary renovation required for opening in the fall of 2023.
* It is unclear whether the applicant group’s financial assumptions regarding the purchase and maintenance of a bus for Learning Expeditions are reasonable. During the interview, the applicant group clarified that the bus would be used for one grade level at a time, approximately 40 students and staff.
* The application indicated approximately $700K total in fundraising revenue over the initial charter term. During the interview, the applicant group provided additional information regarding the application to a private foundation for a $1MM start up grant and the annual fundraising efforts by OSV on behalf of the school, a component of the proposed management contract. The proposed school may fall short of fundraising goals.
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1. The Department estimated the current proportion of the 18 percent NSS cap in use to be 6.9 percent based on current enrollment at Commonwealth charter schools. The Department also projected the maximum student enrollment possible in Worcester based on historical trends of enrollment and enrollment at full capacity of current Commonwealth charters. As of January 3, 2023, there are approximately 1,949 students who are residents of Worcester enrolled at five Commonwealth charter schools, equivalent to $27,671,513 in net district costs based on district payments ($33,930,179) and state reimbursement to the district ($6,258,666). Some of the Commonwealth charter schools in Worcester enroll residents outside of Worcester which is taken into account in the [updated projections](https://www.doe.mass.edu/charter/finance/tuition/fy2023/q2-preliminary.html). [↑](#footnote-ref-2)