

FINAL APPLICATION REVIEW 2015-2016

Proposed School Name (Commonwealth):	Old Sturbridge Academy Charter Public School
Grades Served At Full Capacity:	K-8
Number of Students At Full Capacity:	360
Proposed School Location:	Sturbridge
Proposed Charter Region:	Brimfield, Brookfield, Dudley-Charlton, Holland, Monson, Palmer , Quaboag Regional, Southbridge , Spencer-East Brookfield , Sturbridge, Tantasqua Regional, Wales, Webster
BOLD: Identified as lowest 10 percent district in 2015 rankings	
Proposed Opening Year:	2016-2017

Mission Statement:

Old Sturbridge Academy Charter Public School will provide K-8 students with rigorous, real world learning experiences in a supportive and nurturing school community, helping all students to become reflective inquisitors, articulate communicators, critical thinkers, and skilled problem solvers.

Proposed Growth Plan for First Five Years of Operation:

School Year	Grade Levels	Total Student Enrollment
First Year	K-2	120
Second Year	K-3	160
Third Year	K-4	200
Fourth Year	K-5	240
Fifth Year	K-6	280

The 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 testimony and comment provided at the public hearing and during the public comment period. The below summary 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 testimony and written comment **in support** during the public hearing and public comment process. At the public hearing, 12 speakers spoke in favor of the school, including parents, community members, and 2 members of the applicant group. Written comment in support includes nine letters, of which five are from members of the founding group.

The application received testimony and written comment **in opposition** during the public hearing and public comment process. At the public hearing, five speakers spoke in opposition to the school, including: Webster Public Schools Superintendent Barbara Malkas, Union 61 Teachers' Association President Dan Thompson, a school committee member from both Tantasqua Regional Public Schools and Southbridge Public Schools, and a retired teacher. Written comment in opposition includes a letter from Palmer Public Schools Superintendent Nancy Spitulnik, members of the school committee of Webster Public Schools, and an additional letter from a community member.

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

Identified Evidence

- The mission and vision clearly define the purpose and values of the school, communicate high academic standards and student success, and are reflected throughout the application. The mission reflects aspects of all three key design elements without explicit integration. The mission describes student outcomes using language reflective of its proposed partnership with Expeditionary Learning (EL), a school support organization. The mission states that all students are to “become reflective inquisitors, articulate communicators, critical thinkers, and skilled problem solvers.” (I.A.)
- The application describes three key design elements which are aligned with the proposed mission and reflected to varying degrees in all other areas of the application. The elements are the proposed relationship with Old Sturbridge Village (OSV), the proposed relationship with EL, and the use of Positive Behavioral Interventions and Supports (PBIS). (I.B.)
- The applicant group described how their proposed school distinguishes itself from other options available in the proposed charter region. The applicant group highlighted the unique resources available through the partnership with OSV, as well as the relationship with EL to support effective implementation of the proposed school design and programming. (I.B.)
- The application describes the foundational elements of EL schools, and states that EL’s approach to teaching and learning aligns with the established practices of OSV program educators. During the interview, the Chief Executive Officer of OSV, James Donahue, reported that a feasibility study was performed regarding OSV’s potential involvement in founding a charter school, and EL was identified as a philosophically-aligned partner. (I.B.)
- The application describes a compelling image of the school’s future and its potential positive impact on stakeholders. (I.B.)

Limited Evidence

- The application contains limited development regarding one of the key design elements, the proposed school’s use of Positive Behavioral Interventions and Supports (PBIS). The application is clear that PBIS is central to establishing the mission goal of a “supportive and nurturing community.” However, the discussions of PBIS are limited to general overviews rather than specific plans for implementation. (I.B.)
- While the application communicates a core belief that “all students deserve access to high quality education that will help them exceed academic standards in every discipline while developing into caring community members,” and members of the applicant group shared this core value during the interview, it remains unclear how the proposed school will achieve this goal for students. The application lacks specific key academic and non-academic goals for students, which limits the Department’s ability to assess the group’s capacity to effectively set goals aligned to the proposed mission, and monitor and measure progress towards those goals. (I.B.)

Description of the Community to Be Served and Enrollment and Recruitment (I.C. and I.D.)

Identified Evidence

- The proposed charter school would serve residents of four of the lowest performing districts in the Commonwealth, including Southbridge. During the interview, the applicant group described the extensive and on-going recruitment efforts being performed by OSV employees and reported strong support for the proposed school from Southbridge families. OSV has implemented information sessions in the targeted communities and at OSV, as well as door-to-door campaigning. The applicant group is targeting much of its recruitment efforts in Southbridge. (I.C. and I.D.)
- In the application and during the interview on January 14th, the applicant group described clear evidence of demand for the proposed school, including over 100 intent to enroll forms collected since January 8th for the inaugural classes of kindergarten, first grade, and second grade students. (I.C.)
- The application describes plans for dissemination that include the developing learning expeditions for use by the museum with visiting public schools, disseminating via the EL school network, and hosting professional development events for local educators at OSV. (I.C.)
- The applicant group proposes a slow-growth model that will reach the full enrollment of 360 students in 2024-2025. The applicant group intends to open with 120 students in grades K-2, and to add one grade per year until reaching its full K-8 grade span. The application clearly shows 40 students per grade with twenty students per class throughout the K-8 grade span. The proposed school will allow the entry of new students in all grades, which exceeds regulatory backfilling requirement. (I.D.)
- Based on the growth plan, the proposed school will have four years of academic performance data from the statewide assessment system at the time of its first renewal decision. (I.D.)

Limited Evidence

- While the applicant group points to its three key design elements, OSV, EL, and PBIS, as evidence of capacity to serve the targeted at-risk student population, the applicant group fails to describe how these elements will specifically address student needs. The application emphasizes OSV's current role in the community, which is not reflective of its role in supporting the founding and operation of a charter public school. While the application states that EL and PBIS will "provide students the tools they need to succeed," the role of EL and PBIS in meeting the needs of the anticipated high needs student population is not adequately described. (I.C. and II.A)

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

Identified Evidence

- The proposed educational program provides an extended school year of 185 days as well as extended school day (8:00 a.m. – 3:30 p.m.). Wednesday afternoons include a two hour Discovery Experience for students with OSV program staff. Faculty of the proposed school will engage in professional development during this planned OSV programming. (II.A.)
- The proposed educational program includes two hours of art and music weekly, weekly foreign language instruction in Spanish, and a number of EL practices, such as morning meeting, town meeting, and crew. (II.A. and II.B.)

Limited Evidence

- The application does not indicate the implementation of a physical education and health program during the school day. (II.A.)
- The application describes the intent for OSV to provide before and after school programming for a "sliding" fee in addition to summer programming. The application does not indicate if the programming is intended to be complementary to teaching and learning during the school day. The effective use of OSV mentors, volunteers, and staff to implement the proposed programming is not described. (II.A.)
- The application does not describe how the proposed Discovery Experiences will be aligned with the grade level curriculum implemented by classroom teachers. The application does not indicate the specific goals for students participating in these experiences and how these experiences are integrated into the educational program. (II.B.)
- The applicant group has not provided a clear assessment of the curriculum development or refinement required for its first year of implementation nor how these duties will be performed effectively during the proposed planning period. During the six month planning period, the proposed school leader intends to identify and develop the required curriculum and assessments in all content areas from current EL resources, primarily learning expeditions, and ensure alignment to the Massachusetts Curriculum Frameworks with the support of the school's EL school designer. It remains unclear the extent to which the school's curriculum and assessments will require additional development prior to implementation. (II.B.)
- The application does not describe a clear plan for ongoing development, improvement, and refinement of the curriculum. During the interview, the applicant group noted that the curriculum would incorporate EL learning expeditions but did not describe how the school would develop a cohesive and comprehensive curriculum from a number of different EL schools and commercial resources. (II.B.)

Limited Evidence

- Reviewers expressed concerns that while the application provided clear understanding of the potential strengths of the OSV and EL partnerships, the application did not articulate a comprehensive plan that would support high academic achievement for students with a diversity of needs. The application identified the intent to employ content area teachers in the upper grades but provided an otherwise limited discussion of the proposed middle school programming. (II.B.)
- The application does not provide adequate information regarding the structures for collaboration and professional development to improve implementation of the curriculum and instructional practice. The application notes common planning time will take place three times a week for grade level teams and two hours each Wednesday for planning and professional development. (II.B.)

Student Performance, Assessment, and Program Evaluation (II.C.)

Identified Evidence

- The proposed school's assessment system incorporates a variety of performance-based assessment tools, such as presentations and portfolios, which are consistent with high expectations of students and the proposed school's mission and vision. (II.C.)
- The application describes the use of quarterly progress reports and conferences that include the participation of students, parents, and teacher. (II.C.)

Limited Evidence

- The application provides a limited and inadequate discussion of the performance, promotion, and graduation standards for the proposed school. While it is clear that the school plans to implement standards-based grading based on the best practices of other elementary charter schools, the limited discussion regarding its policies and the integration of the potential assessments into the grading system, limits the ability to evaluate the group's capacity to implement effectively. (II.C.)
- Due to the limited and generalized discussion within the application, it is unclear how the group will develop an assessment system that will provide a cohesive picture of student learning and the effectiveness of teaching practice. The application does not describe a clear design for measuring and reporting the performance and progress of the school, or how student performance on assessments will be used to facilitate decision-making about adjustments to the educational program and inform a staff development plan that will support the goal of improved student learning. (II.C.)
- The application does not adequately discuss how stakeholders will participate in the review and response to student achievement data, including the board of trustees. (II.C.)

Supports for Diverse Learners (II.D.)

Identified Evidence

- The application describes a clear intent to implement Response to Intervention (RTI) to support effective student learning, which in combination with PBIS, will target student social-emotional development and the establishment of classrooms conducive to student learning. (II.D.)
- The application describes the plan to support professional development that will ensure classroom teachers have a variety of intervention strategies at their disposal, including certification in Orton-Gillingham or Wilson Reading. (II.D.)

Limited Evidence

- The proposed principal is the proposed supervisor of all special education and English as a Second Language (ESL) teachers, paraprofessionals, and the school psychologist until the student support coordinator is hired. The on-boarding of the student support coordinator is not indicated in the budget during the first charter term. (II.D.)
- While the application clearly states the intent to comply with state and federal laws and regulations, the description of the processes and procedures used to identify, assess, and serve students receiving special education services was limited, and could not establish adequate knowledge to serve students with disabilities in accordance with requirements. For example, the application does not provide clear information on the types of support services to be offered, the qualifications of individuals delivering services, or how the program will be evaluated. (II.D.)
- Similarly, while the application clearly states the intent to comply with state and federal laws and regulations, the description of the processes and procedures used to identify, assess, and serve English language learners (ELLs) could not establish adequate knowledge to serve ELLs in accordance with requirements. For example, the application did not clearly describe implementation of an ESL program, provided limited information regarding the English language development curriculum, and did not describe how the program will be evaluated. (II.D.)

Culture and Family Engagement (II.E.)

Identified Evidence

- The application describes a variety of meaningful strategies to involve parents/guardians as partners in the education of their children, and the building and maintaining of family-school partnerships. Strategies include home visits by teachers, quarterly family events, monthly coffee hours with the principal, volunteer opportunities within the classroom and school, as well as free family memberships to OSV at no cost to the school. (II.E.)
- The application notes the intent to participate in the federal lunch program and indicates plans for both breakfast and lunch food service based on the targeted 40 percent economically disadvantaged student population. (II.E.)
- The governance model of the proposed board of trustees includes board membership earmarked for a member of the parent advisory council. (II.E.)

Limited Evidence

- The application does not describe specific strategies that the school will implement to establish school culture. The application notes the intent to develop character values and habits of scholarship through school structures and practices found at other EL schools but provides little information regarding how those structures will be implemented at the proposed school or used to support and monitor student development over time. (II.E.)

Capacity and Governance (III.A. and III.B.)

Identified Evidence

- During the interview, members of the proposed board of trustees as well as the leadership of the proposed charter management organization (CMO), OSV, were able to accurately identify the proposed board as ultimately responsible for the recruitment, hiring, evaluation, and firing of the proposed principal. The proposed board intends to receive recommendations from the CMO regarding these matters. While accurately described in the interview, the organizational chart does not accurately reflect the board's independent oversight of the school distinct from the proposed relationship with OSV. (III.B.)
- At the interview, the proposed board of trustees articulated the general differences between board and administrative decisions, and described how they will hold the school leader accountable through the regular use of academic and financial dashboards. (III.B.)
- The application included a draft contract based upon current management agreements between charter school boards of trustees and their management organizations, and contains the majority of required elements. If chartered, the contract would require review and approval by the Department. (III.B.)
- The management organization has a leadership team that can provide services in the areas of operations, human resources, financial management, and leadership development. The proposed management fee increases from 6 to 10 percent of the school's total tuition revenue over the first charter term. (III.B.)
- The applicant group has partnered with Expeditionary Learning (EL), a school support organization, to support the proposed school in its development, and implementation of the proposed educational program. During the interview, the EL representative described the support role of the EL school designer during the pre-operational period. The EL school designer would support the principal in faculty recruitment, professional development, and outreach to existing EL schools in Massachusetts. (III.B.)

Limited Evidence

- While the applicant group has identified eight qualified individuals as proposed board members since the submission of the prospectus in late July, the proposed board has had limited time to develop the necessary knowledge of Commonwealth charter schools to be an effective charter school board of trustees. (III.B.)
- The proposed board lacks a member with a K-12 education background to assist in monitoring the proposed school's academic performance and the school leader's effectiveness in developing and implementing the proposed academic program. (III.A.)
- The application provided a limited and generalized response to the majority of criteria related to board governance which limited the Department's ability to assess knowledge of the role and responsibility of a charter school board of trustees. (III.B.)
- While the proposed board, proposed principal, and proposed partner organizations are committed to establishing the proposed school, it is unclear if the six month planning period will be sufficient for the group and their selected educational management organization, OSV, and school support organization, EL, to effectively implement the components of the proposed school during the first year of operation. (III.A.)

Management (III.C.)

Identified Evidence

- The application contains the required organizational charts for year one and year five of operation, which indicate the general categories in which staff would be assigned, such as teacher or Title 1 staff, and the shift in reporting structure once a student support coordinator is hired. The organizational chart also includes a Parent Advisory Council that will provide input to the proposed board of trustees. (III.C.)
- While the proposed management organization has no prior experience in supporting the operations of a public school, the Chief Executive Officer, James Donahue, was previously the founder and leader of the first charter school authorized in Rhode Island, Highlander Charter School. The application describes the principal as the “day-to-day instruction leader, supported by Jim Donahue” and OSV resources. (III.C.)
- It is clear that OSV will provide administrative services to the school related to the facility, food services, human resources, development, information technology, faculty and student recruitment, and financial services. (III.C.)

Limited Evidence

- The description of the proposed principal’s role and responsibilities as well as the criteria for selection are generalized and limited. In addition, the application does not identify the skills and experience of the selected individual, Cynthia Ahern, or describe how her professional background supports her capacity to be successful in founding a high quality charter school and achieving the school’s mission as the school leader. During the interview, the proposed board of trustees reported that the proposed principal was a recommendation from OSV. Different trustees indicated either an acceptance of OSV’s recommendation or that a determination had not yet been made regarding the proposed candidate. It was clear that a final determination would be made after charter award by the proposed board. (III.A. and III.C.)
- The application provided a limited response to criteria related to the management of the school. The Department could not effectively assess the group’s understanding of the proposed division of labor for the proposed principal or the OSV chief executive officer. In addition, the application failed to address the following criteria related to human resources:
 - the qualifications and attributes of an ideal teacher for the school;
 - the plan for staff recruitment, advancement, and retention;
 - the teaching program of typical teachers, including how many hours they will be performing instructional duties, and other school-related responsibilities they will have outside the classroom;
 - the school’s working conditions and compensation package(s) that will attract highly qualified staff;
 - how individual base salaries and increases will be determined for all employees, including leadership, administrators, teachers, and non-instructional staff; and

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Management (III.C.) cont.

Limited Evidence

- [In addition, the application failed to address the following criteria related to human resources (continued)]:
 - a staffing chart and narrative staffing plan, for each year of the proposed charter school within the five year term of the charter that is viable and adequate for the effective implementation of the proposed educational program.
- The application provided a limited response regarding how the school will make key decisions about curriculum and instruction, student achievement, professional development, culture, staffing, fiscal planning, and operations. (III.C.)

Facilities, Student Transportation and Finances (III.D. and III.E.)

Identified Evidence

- The application describes the plans to occupy an existing educational facility on OSV's campus that is in a separate and distinct area of the property. During the interview, the applicant group provided additional details regarding the readiness of the property to transition to a school building. The ability of the group to access an appropriate and accessible facility ready for immediate use removes a significant obstacle to opening for the 2016-2017 school year. The proposed location of the school on the museum's campus provides access to resources established as part of the museum's operations, including a greenhouse, working farm, gardens, pottery shop and kiln, woodworking studio, 300 seat theater, and hiking trails on the museum's 200 acre campus. (III.D.)
- Sturbridge residents will receive transportation from the district in accordance with district policies. While the application states that families residing outside of Sturbridge will be responsible for transportation in the first two years of operation, in the application and during the interview, the applicant group stated the commitment to provide regional transportation in the first charter term as soon as financially possible to ensure that the targeted at-risk student population has access to the school. The applicant group reported in both the application and during the interview plans to provide bus routes outside of Sturbridge in year three. (III.D. and III.E.)

As proposed in the draft management contract, OSV's vice president of finance, Tina Krasnecky, will oversee the financial management services provided to the school and communicate directly with the board's treasurer. The application describes a number of fiscal controls to be implemented by the board of trustees, including reports from the board treasurer and reviews of financial statements on a monthly basis. The applicant group proposes to track finances in accordance with the *Massachusetts Charter School Recommended Fiscal Policies and Procedures Guide*. (III.E.)

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Limited Evidence

- The budget appeared to overestimate per pupil funding for Title 1 as well as the proportion of the student population that would be identified as economically disadvantaged (\$900 per student, assuming 40 percent economically disadvantaged). (III.E.)
- The submitted action plan did not convey the necessary knowledge or preparedness for opening in the fall of 2016. (III.F.)

Facilities, Student Transportation and Finances (III.D. and III.E.) cont.

Identified Evidence

- The application contains a clear and reasonable description of the proposed school's finances with generally reasonable assessments of projected revenue and expenditures with limited exceptions (see *Limited Evidence*). The application includes clear budgets and cash flow projections developed by OSV's vice president of finance. (Section III.E.)
- While the application does not include the required staffing chart or related narrative, the proposed budget and related narrative provide a general understanding of projected staffing during the first charter term. (III.E.)
- At the interview, the proposed board of trustees indicated their commitment to fundraising, and OSV shared updates on their fundraising efforts on behalf of the proposed school. The board has received financial support for the pre-operational period through OSV's efforts, and is also awaiting decisions on grants from private and governmental entities if awarded the charter in February. (III.E.)