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| **final application REVIEW 2016-2017** |
| **Proposed School Name (Commonwealth):** | Old Sturbridge 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:** | Sturbridge |
| **Proposed Opening Year:** | 2017-2018 |
| **Proposed Charter Region**: | Sturbridge, Brimfield, Brookfield, Holland, Monson, North Brookfield, Palmer, Southbridge, Spencer-East Brookfield, Wales, Webster[[1]](#footnote-1) |
| **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. Old Sturbridge Academy Charter Public School, an EL Education school working in partnership with Old Sturbridge Village, will foster a learning environment that represents all aspects of the diversity spectrum where our students will meet or exceed grade-level expectations in all subject areas. The school will be distinguished by four key commitments of EL Education: a commitment to community, a commitment to high-quality work, a commitment to real-world applications of learning, and a commitment to imagination, exploration, and immersion.A culture of quality will permeate the school and our students will graduate with an understanding of how they learn best and how to advocate for the resources they need when they are challenged. **Proposed Growth Plan for First Five Years of Operation:**

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| **School Year** | **Grade Levels** | **Total Student  Enrollment** |
| First Year | K-3 | 160 |
| Second Year | K-4 | 200 |
| Third Year | K-5 | 240 |
| Fourth Year | K-6 | 280 |
| Fifth Year | K-7 | 320 |

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, 11 speakers spoke in favor of the proposed school, including teachers, parents, community members, and one member of the applicant group. Written comment in support includes one written statement shared at the public hearing and ten letters received by the Department from community members.One speaker at the public hearing, a community member, spoke **in opposition** to the proposed school. The Department received one letter in opposition during the public comment process, from Webster Public School Committee members Shawn Collins (Chairman), Michael Makara (Vice Chairman), Brian Chenevert, Martina Gorski-Strong, David Hurton, and Webster Interim Superintendent of Schools Richard Lind, Jr. |

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

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| **Identified Evidence** | **Limited Evidence**  |
| * The mission clearly defines the purpose and values of the school, communicates high academic standards and student success, and is reflected throughout the application. The mission states that all students are to “become reflective inquisitors, articulate communicators, critical thinkers, and skilled problem solvers.” (I.A.)
* The application describes two key design elements which are aligned with the mission and reflected throughout the application. The elements are the school’s relationship with Old Sturbridge Village (OSV) and the school’s relationship with EL Education, formerly known as Expeditionary Learning (ELE). During the interview, members of the applicant group further clarified aspects of the school’s design that the relationships with OSV and ELE will facilitate. These include project-based learning, opportunities to learn outside the classroom, a culture of high expectations, and an emphasis on character development. (I.B.)
* The application describes how the proposed school distinguishes itself from other options available in the proposed charter region. The application highlights both the unique resources available through the partnership with OSV and the ways in which ELE will support effective implementation of the proposed school.
* The application presents key academic and nonacademic goals for students in three dimensions of student achievement used by ELE schools: mastery of knowledge and skills, character, and high quality work. The goals presented are specific, measureable, action oriented, rigorous, and results focused. (I.B.)
 | * No primary concerns noted.
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| **Description of the Community to Be Served and Enrollment and Recruitment (I.C. and I.D.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application lists the names of the communities the school would serve and states that the founding group is interested in serving students in underperforming districts and in communities with significant percentages of students in the economically disadvantaged subgroup. The application describes extensive work done by the applicant group to establish the sorts of connections in the community that will be needed if the school is to recruit the student population it says it would like to recruit. The applicant group is targeting much of its recruitment efforts in Southbridge. (I.C. and I.D.)
* The application describes how the applicant group assessed parental support during the current and prior application cycle by meeting with parents and leaders of community organizations, conducting information sessions, recruiting door to door, fielding phone calls and email inquiries, and collecting intent to enroll forms. (I.C.)
* The application states that the OSV Marketing Department will support the school’s staff in publicizing the school, by communicating in local media, reaching out to local organizations, distributing flyers, and advertising on OSV’s website. The proposed school will continue to receive support in recruitment under the proposed management contract. (I.C.)
* The application explains that a Commonwealth charter is necessary in order to offer the ELE model, which is not currently offered at any other school in the region to be served by the school. During the interview, members of the applicant group described how the ELE model will foster student engagement and provide differentiated support for the students the school hopes to recruit. (I.C.)
* The application indicates that the school plans to enroll 160 students in year one in grades K-3 (40 students per grade). The school will add one grade each year, maintaining an enrollment of 40 students per grade, until the school is fully expanded in year six, when it will serve 360 students in grades K-8. The proposed school will allow the entry of new students in all grades, which exceeds the regulatory backfilling requirement. (I.D.)
 | * No primary concerns noted.
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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 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 application provides a sample weekly schedule for students in grades K-4 (identified as the elementary grades) and a sample weekly schedule for students in grades 5-8 (identified as the middle school grades). The application also provides a description of the mechanics of the education program to explain the sample schedules. (II.A.)
* The application illustrates a typical day from the perspective of a first grader and illustrates a typical day from the perspective of a teacher (subject and grade are not indicated). The first grader’s day includes a trip to the museum during a 75-minute afternoon integrated literacy block. During the interview, applicant group members indicated that they anticipate students will typically access the museum on a daily basis, either by going to the museum or through a classroom visit by a museum staff member. (II.A.)
* The application identifies the proposed director of teaching and learning as the person who will lead processes to develop, adapt, evaluate, and/or revise the curriculum and to aligning the curriculum to the Massachusetts Curriculum Frameworks (MCF). The director of teaching and learning will be supported by the ELE school designer and by a director of student support. (II.B.)
* Key aspects of the learning environment described in the application include: class sizes of 20 students; use of an inclusion model; text-rich classrooms; use of manipulatives; and use of technologies such as interactive whiteboards, document cameras, tablet computers, and laptop computers. (II.B.)
* The application describes the following instructional methods to be used at the proposed school: teachers facilitate students’ learning and problem-solving abilities using a workshop model of instruction; teachers follow Universal Design for Learning (UDL) guidelines in differentiating instruction for students with diverse learning needs. Other distinguishing elements of the instructional program include Crew, which is a daily meeting focused developing character and building community, and Learning Expeditions, which are extended and in-depth learning projects with tangible real-world connections. (II.B.)
* The application describes a three-tiered Response to Intervention approach for supporting the needs of all students. Tier One includes whole class and small group differentiated lessons. Tier Two includes targeted support in small groups and one-on-one instruction. Tier Three includes more intensive interventions provided by a special education or English as a Second Language (ESL) teacher. (II.B.)
* The application describes professional development that will be provided to teachers prior to the start of the school year. During the interview, applicant group added that prior to the start of the first school year, the director of teaching and learning, the director of student support, and core content area teachers will attend a four-day training on teaching in the ELE model. The application describes in general terms how the school plans to train and support teachers on an ongoing basis, referencing inquiry-based study groups, teacher coaching cycles, assistance for curriculum development, learning walks, and teacher training on site and off site. In addition the weekly school schedule includes formal structures for regular, frequent collaboration and professional development, including common planning time and meetings to discuss student data. (II.B.)
* The application states that staff development needs will be assessed based on analysis of student data by the school’s director of teaching and learning and the ELE school designer. (II.B.)
* The application states that the school will use the Massachusetts Model to evaluate teachers. The director of student support will coach, supervise, and evaluate teachers who provide special services, and the director of teaching and learning will evaluate all other teachers. (II.B.)
 | * The extent to which curriculum will need to be adapted from existing ELE curricular materials or developed is unclear in the application. During the interview, the proposed director of teaching and learning and the ELE representative indicated that the school would adapt existing ELE curriculum and reported that the plan for adapting the curriculum will be developed following the award of the charter. (II.B.)
* The application lacks clarity with regard to the processes to be used to develop, adapt, evaluate, and/or revise the curriculum and to align the curriculum to the Massachusetts Curriculum Frameworks (MCF). During the interview, the proposed director of teaching and learning indicated that ELE curricula is aligned to the Common Core standards, and stated that there is a commitment to ensuring that lessons and assessments are standards-aligned. (II.B.)
* The application describes plans for OSV staff to deliver instruction, but does not describe the qualifications of OSV staff to deliver instruction, explain how they will be overseen by the school, or describe how they will be trained and supported to deliver instruction that meets the needs of all students. During the interview, members of the applicant group described plans to provide professional development for OSV staff around teacher language and behavior management in order to develop consistency in the language used by school and museum staff members. Applicant group members further stated that the director of teaching and learning will occasionally observe instruction provided by museum staff during the Wednesday afternoon Discovery Experience, and will work with the museum’s director of education to assess instruction provided by museum staff. (II.A., II.B.)
* It is unclear how the proposed Executive Director, whose services will be obtained through the management contract with OSV, will identify and support the professional development needs of the two administrators. (II.B.)
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| **Student Performance, Assessment, and Program Evaluation (II.C.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application identifies a variety of assessment tools to measure student progress and to modify instruction. The application includes a table listing all assessments to be used at the school. For each assessment, the table indicates the grade level(s) at which the assessment is to be administered, the frequency, and an explanation for how results will be used to improve the program. In addition to external assessments, such as Dynamic Indicators of Basic Early Literacy Skills (DIBELS), Fountas & Pinnell Benchmark Assessment System, and Northwest Evaluation Systems’ Measures of Academic Progress (MAP) and MAP for Primary Grades (MPG), the school is planning to use various curriculum-based assessments. (II.C.)
* The application includes the school’s philosophy and plans for student homework. Homework assignments are to provide students with opportunities to practice skills taught at school. The school plans to follow the National Parent-Teacher Association guidelines for the amount of homework assigned each night at each grade level. (II.C.)
* The application states that the director of teaching and learning and the director of student support will share responsibility for the assessment system, with the director of student support focusing on data for students identified as English learners (ELs), students with disabilities, and students identified as economically disadvantaged. The director of teaching and learning (DTL) and director of student support (DSS) will support teachers in reviewing and analyzing data on a regular basis during common planning time meetings. (II.C.)
* The application describes specific ways in which students, parents, teachers, school administrators, and board members will regularly participate in the review and response to student achievement data. (II.C.)
* The proposed school will have five years of academic performance data from the statewide assessment system at the time of its first renewal decision. (II.C.)
 | * As written, the proposed school’s promotion and exit standards lack clear benchmarks to identify when a student would be eligible for promotion. (II.C.)
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| **Supports for Diverse Learners (II.D.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application provides 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 demonstrates an awareness of the school’s obligations with regard to serving ELs. Evidence within the application includes the following information. (II.D.)
	+ The application includes a description of the English language development program and support services to be used, including a plan to develop English as a second language (ESL) curriculum with support from EL Education, and a description of the sheltered English instruction (SEI) strategies to be used by all teachers. (II.D.)
	+ The application indicates that English learners (ELs) will be identified and assessed using the state’s assessment tools. (II.D.)
	+ The application indicates that sheltered English immersion (SEI) instruction will take place in general education classrooms and that ESL instruction will be provided for the mandated number of hours each day. (II.D.)
	+ The application states that the school will set aside funds to support teachers in obtaining SEI endorsement, as needed, and will further assist them in identifying training programs leading to the SEI endorsement. (II.D.)
	+ The school plans to hire a full-time licensed ESL teacher, and plans for administrators, including the ESL teacher’s supervisor (the director of student support) to obtain SEI administrator endorsement. (II.D.)
	+ The application explains how the program serving ELs will be evaluated using the state’s EL program evaluation guidelines. (II.D.)
* The application provides 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. The application demonstrates an awareness of the school’s obligations with regard to serving students with special needs. Evidence within the application includes the following information. (II.D.)
* The application includes a general description of special education support services to be offered based on students’ individualized education plans (IEPs). (II.D.)
* The application describes how student identification and assessment for special education services will be conducted and how IEPs will be developed. (II.D.)
* The school plans to hire a director of student services in year one who will serve half time as a special education teacher. In year two, the school will hire an additional special education teacher. The application specifies the salaries for both positions. (II.D.)
* The application explains how the special education program will be evaluated on an annual basis by the director of student support, other members of the leadership team, and teachers, using criteria drawn from the state’s Coordinated Program Review process. (II.D.)
 | * The application does not provide a clear rationale for the proposed staffing levels for special education programming. The proposed director of student support would perform both teacher and administrator duties during the first year of operation with 160 students in grades K-3. At full enrollment, the proposed school intends to employ two special education teachers and one administrator. (II.D.)
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| **Culture and Family Engagement (II.E.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application describes a number of school structures intended to establish and foster the school’s culture. The school intends to establish common expectations and protocols around student behavior. All students will participate daily in Crew, a morning 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 include various school-wide activities and exhibitions for sharing student work. (II.E.)
* The application indicates that the school will offer free breakfast and lunch to all students. (II.E.)
* The school’s philosophy regarding student behavior is based on the idea that all members of the school community commit to the school’s code of conduct, which outlines character traits related to interpersonal relationships and academic work. These character traits are to be modeled by staff and referenced frequently during their interactions with students. (II.E.)
* The application describes the school’s plans regarding student behavior and discipline for the general student population and for students with special needs. These plans are consistent with requirements and with the school’s mission and educational philosophy. (II.E.)
* The application describes how the school plans to involve parents/guardians as partners in the education of their children, by facilitating frequent communication regarding students’ academic and behavioral performance. The application describes a variety of ways in which partnerships with parents will be developed and nurtured: parents will be surveyed quarterly; parents will have the opportunity to serve on a parent advisory council and a special education parent advisory council; parents will be invited to attend events at the school; parents will have opportunities to mentor students, volunteer in classrooms, and lend expertise to Learning Expeditions. Families will also receive memberships to OSV at no cost to them or the school. During the interview, applicant group members indicated that the school will provide transportation for families to attend events at the school. (II.E.)
* The application lists services that will be available to families through the Community Health Network and the Seven Hills Foundation. (II.E.)
 | * No primary concerns. (II.E.)
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| **Capacity and Governance (III.A. and III.B.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application identifies James E. Donahue, Chief Executive Officer (CEO) of OSV, as the primary author of the application, and lists six other individuals, an EL Education consultant, the proposed director of teaching and learning, and four OSV staff members, who supported the writing process. (III.A.)
* The application lists six founding group members, five OSV staff members and the proposed director of teaching and learning, and eight proposed board members. Members possess skills and experience in the areas of management, finance, development, board governance, and education. All have tangible ties to the communities the school will serve. (III.A.)
* While the proposed management organization has no prior experience in supporting the operations of a public school, Mr. Donahue was previously the founder and leader of the first charter school authorized in Rhode Island, Highlander Charter School. (III.C.)
* The proposed management contract includes the services of Mr. Donahue as a proposed executive director who will support the proposed school leaders, provide oversight of the services provided by OSV to the school, and report directly to the board regarding the management of the school. (III.C.)
* The proposed director of teaching and learning, Lisa DeTora has over 14 years experience as a public educator, including her current role as a teacher for grades 5 and 6 in the Fitchburg Public Schools at an innovation school. Ms. DeTora is currently pursuing her principal’s licensure. (III.C.)
* The application includes a brief description of the roles of each of the four board officer positions: chair, vice chair, treasurer, and secretary. (III.B.)
* The application indicates that the board will have four committees: finance, development, governance, and community engagement. (III.B.)
* The application describes the proposed process and procedure for handling complaints made to the board. (III.B.)
* The application describes the recruitment, selection, and orientation processes for new board members. (III.B.)
* The application included a draft contract based upon current management agreements between charter school boards of trustees and their management organizations, and was developed in accordance with published Department guidance. If chartered, the contract would require review and approval by the Department. (III.B.)
* The 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 nine percent of the school’s total tuition revenue over the first charter term. (III.B.)
* The applicant group has partnered with EL Education, a school support organization, to support the proposed school in its development, and implementation of the proposed educational program. (III.B.)
 | * The application lacks some clarity in articulating the reporting relationships between the board and the two school directors. During the interview, responses from proposed trustees also indicated a lack of clarity over the division of responsibility between the board and the proposed management organization regarding the hiring, firing, and evaluation of school directors. (III.B.)
* The application expresses a commitment to having the board act in ways that are consistent with public accountability, but does not provide enough detail in its description of future actions to determine whether the applicant group has an understanding of what is involved in meeting its responsibilities with regard to public accountability. (III.B.)
* The application includes limited and generalized responses to criteria related to most board governance processes, including processes for: setting priorities and goals; monitoring progress towards priorities and goals; supporting, monitoring, and evaluating the school leader; evaluating services provided by OSV and EL Education; developing the annual budget; monitoring the school’s finances; conducting long-term financial and strategic planning; evaluating the board’s own performance; and developing policies and making decisions. (III.B.)
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| **Management (III.C.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application includes a school organizational chart for Year One and at full student enrollment and explains the rationale for the structure and lines of communication. (III.C.)
* The application describes the roles and primary responsibilities of the executive director and the school’s two key leaders: the director of teaching and learning and the director of student support. (III.C.)
* The application identifies the individuals who will serve as the executive director and director of teaching and learning, and summarizes the relevant experience they bring to their prospective roles. The application describes the desired skills and experience of the ideal individual to serve in the director of student support role. (III.C.)
* The application describes the qualifications and attributes of an ideal teacher for the proposed school, and describes plans to recruit and retain teachers with these attributes. The school plans to conduct a national search while also making use of local connections to teacher preparation programs. The school aims to retain teachers by offering competitive salaries and supporting teachers’ professional development. (III.C.)
* The application explains the school’s working conditions and compensation package, and further specifies base salaries and how increases will be determined for staff members. (III.C.)
 | * The application does not provide evidence regarding the proposed executive director’s capacity to fulfill the role of executive director while also serving as CEO of OSV. During the interview, a member of the OSV board affirmed the board’s commitment to Mr. Donahue’s added role of school executive director, and indicated that the OSV plans to develop a set of dashboard items to evaluate Mr. Donahue’s performance. (III.C.)
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| **Facilities, Student Transportation and Finances (III.D. and III.E.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application states that the school is committed to providing transportation for all students. The school plans to charter buses that will stop at pick-up and drop-off locations in every community within the region. (III.D.)
* The application states that the board will attempt to secure a line of credit to ensure that the school can meet all its obligations, particularly during year one, when spending is expected to exceed income during the first three months. (III.E.)
* The application states that the budget was developed by the founding team, with input from outside advisors and using ESE and other government resources. (III.E.)
* The application includes a multi-year budget from the school’s start-up phase through its fifth year of operation. The application summarizes financial forecasts and describes most assumptions with sufficient detail. (III.E.)
 | * The applicant group has identified a facility on the OSV property for the proposed school that can be renovated to accommodate growing enrollment over the first charter term. Based upon information provided during the interview, it was unclear if the renovations required will be completed to permit opening in FY2018. The applicant group has subsequently indicated that the school intends to utilize modular buildings for year 1 of operations in order to ensure preparedness for opening the proposed school in 2017. (III.D.)
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1. The Department has determined that there are approximately 81 seats currently available for charter school enrollment in Sturbridge based on net school spending projections in April 2016. There are an additional 138 seats available for charter school enrollment due to Sturbridge’s membership in Tantasqua Regional School District for grades 7 -12. The Tantasqua Regional School District includes the following towns as members: Sturbridge, Brimfield, Brookfield, Holland, and Wales [↑](#footnote-ref-1)