

NEIL ABERCROMBIE
GOVERNOR



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STATE PUBLIC CHARTER SCHOOL COMMISSION
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RECOMMENDATION SUBMITTAL

DATE: April 24, 2014

TO: Mitch D’Olier, Chairperson
Applications Committee

FROM: Tom Hutton, Executive Director

AGENDA ITEM: Action on Charter School Application for North Shore Middle School

I. DESCRIPTION

That the Committee recommend that the Commission deny North Shore Middle School’s (“NSMS”) 2013 charter school application.

II. AUTHORITY

Charter School Applications: Pursuant to §302D-5(a), Hawaii Revised Statutes, “[a]uthorizers are responsible for executing the following essential powers and duties: . . . (1) Soliciting and evaluating charter applications; (2) Approving quality charter applications that meet identified educational needs and promote a diversity of educational choices; [and] (3) Declining to approve weak or inadequate charter applications[.]”

III. APPLICANT PROFILE

Proposed School Name: North Shore Middle School

Mission: Foster students’ capacities to improve their communities, from local to global, through experiential and problem-based learning.

Vision: To create a charter middle school for the North Shore of Oahu that will prepare students for academic excellence in high school through innovative curriculum, problem-based experiential, and service learning, as well as foster a new generation of community leaders.

Geographical Area: The 60 mile coast of the North Shore of Oahu, from Kaneohe to Waipahu

Program Synopsis: NSMS identifies its school model as specializing in arts, blended learning, career and technical education, and college prep. NSMS plans to use a blended learning model that incorporates project-based classroom instruction, an online curriculum that can be individualized, and a supplemental and support morning workshop. Service learning, required music and world language courses, and various after-school programs are also part of the program.

Enrollment Summary

Grade Level	Number of Students					
	Year 1 2015	Year 2 2016	Year 3 2017	Year 4 2018	Year 5 2019	Capacity 2020
K	-	-	-	-	-	-
1	-	-	-	-	-	-
2	-	-	-	-	-	-
3	-	-	-	-	-	-
4	-	-	-	-	-	-
5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	50	50	75	75	100	100
8	50	50	75	75	100	100
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
Totals	100	100	150	150	200	200

IV. BACKGROUND

On January 6, 2014, a community group submitted a charter application for the proposed charter school, NSMS. The Evaluation Team assigned to the NSMS application was comprised of Stephanie Klupinski, Kathy Olsen, Jeff Poentis, Kirsten Rogers, and Stephanie Shipton. In conjunction with the application, the Evaluation Team reviewed the Applicant's Responses to the Request for Clarification and interviewed applicant group members. The applicant group members who attended the interview were Sandro Lanni, Monique Mironesco, James O'Shea, Dali Pyzel, and Eloy Villaba.

After evaluating the information presented in the application, Request for Clarification response, and capacity interview, the Evaluation Team published its Recommendation Report. The applicant exercised its option to write a response to the Recommendation Report, and the Evaluation Team drafted a rebuttal to that response. The Recommendation Report (**Exhibit A**), Applicant Response (**Exhibit B**), and Evaluation Team Rebuttal (**Exhibit C**) make up the Recommendation Packet.

In addition, the Commission held a public hearing on the application on March 13, 2014. Ms. Pyzel and three concerned individuals submitted written testimony in support of NSMS. Three applicant

group members and three others provided oral testimony in support of NSMS. Three other individuals were present at the public hearing, but were permitted to yield their time to Ms. Pyzel so she could make a longer statement.

Recommendation Report.

The Evaluation Team recommends that the application for NSMS be denied. The Recommendation Report states that the academic plan, organizational plan, financial plan, and evidence of capacity do not meet the standards of approval and concludes that the application demonstrates a community need for a middle school but that “the applicant needs more capacity and a better implementation plan.”

The report notes that the applicant “attempts to do too many things without having a clear plan for successful implementation.” Other key concerns the report cites about the academic plan include:

- An inadequate understanding of the challenges of effectively implementing a blended learning model;
- A lack of cohesion between the online and project-based curriculum;
- An absence of curriculum or standards for some aspects of the proposed program; and
- Issues with the proposed morning workshops, including research findings that students perform better with later starts and possible disproportionate impacts on special needs and at-risk students.

The report finds that an unrealistic staffing structure is a significant weakness of the application. Other key concerns about the organizational plan include:

- The amount of responsibilities placed on teachers without clearly setting aside needed preparation time;
- A lack of understanding of the collective bargaining implications of the additional responsibilities for teachers;
- The plan to hire a person who specializes in both reading and math and who also spends time facilitating the morning workshops;
- The heavy reliance on volunteers, especially with only a 0.25 part-time volunteer coordinator position; and
- An absence of a satisfactory professional development plan that addresses the needs of a blended learning school.

The report finds that the “budget lacks information in key areas,” such as technology peripherals needed for operating and maintaining the blended learning curriculum. Other key concerns about the financial plan include:

- A cost-cutting contingency plan that reduces the hours of low-cost, non-essential employees, such as the already part-time volunteer coordinator even though the school depends heavily on volunteers; and
- A lack of financial capacity, as the applicant “did not demonstrate that it could implement the plan being proposed.”

Finally, the report raises key concerns about capacity, including:

- The lack of experience and qualifications of the proposed school leader, on whom the applicant heavily relies, in school leadership, governance, curriculum and instructional design, and performance management;
- The heavy reliance on volunteers and high demands of staff; and
- The inability of the applicant to answer questions about its financial plan.

Applicant Response.

The Applicant Response attempts to clarify some key concerns brought forth in the Recommendation Report and disputes others.

In regard to the academic plan concerns, the response:

- Notes that the proposed blended learning program is modeled off of similar programs across the nation;
- Claims that the application originally included “complete descriptions of every proposed class” but justifies the exclusion of the information due to page and attachment limitations and the application criteria only requiring an “overview” of the curriculum; and
- Notes that the proposed morning workshops do not “single out” special needs and at-risk students and are a “resource [that] is more inclusive than traditional public school pull-out periods.”

In regard to the organizational plan concerns, the response:

- Notes that the organizational chart in the application shows more staff and teachers than the report notes when referencing the application’s staffing chart;
- Notes that the reading and math specialist would use computer programs as the “main means of instruction,” which “allows the teacher to take an evaluator and support role;”
- Contends that the program does not rely on volunteers and that volunteers are used as support; and
- Notes that professional development is included in the start-up plan and school calendar.

In regard to the financial plan concerns, the response:

- Notes that the application includes a completed financial plan template and answers all of the required questions in the Request for Applications;
- Notes that information about the technology and personnel budget received from the Hawaii Public Charter School Network and the Charter School Management Corporation (“CSMC”) contradict the Evaluation Team’s opinion;
- Again contends that the program does not rely on volunteers; and
- Notes that, aside from the start-up year, the budget does not rely on grants or other funding sources.

In regard to the capacity concerns, the response:

- Justifies the proposed school leader’s qualifications; and
- Cites CSMC’s credentials as evidence of financial capacity.

Evaluation Team Rebuttal.

The Evaluation Team Rebuttal attempts to address points raised in the Applicant Response.

In regard to the applicant's response to the academic plan concerns, the rebuttal:

- Maintains that the academic plan does not demonstrate a cohesive, successful plan to connect online and project-based curricula;
- Acknowledges that the application is not required to include "detailed curriculum and standards" but should alternatively include a "comprehensive overview;" and
- Maintains that the applicant did not provide a "comprehensive overview" for key components of the curriculum.

In regard to the applicant's response to the organizational plan concerns, the rebuttal:

- Maintains that the application "relies heavily on a small staff and a large number of volunteers," as evidenced throughout the application process;
- Contends that the Applicant Response does not address the concerns surrounding the reading and math specialist; and
- Maintains that the application heavily relies on volunteers, including in the delivery of curriculum.

In regard to the applicant's response to the financial plan concerns, the rebuttal:

- Contends that the Applicant Response does not address concerns surrounding the "lack of disclosure of technology, transportation, and personnel cost and details;"
- Again maintains that the application does rely on volunteers; and
- Notes that the budget relies on a competitive federal grant that "constitutes approximately 70% of the proposed school's revenue during the start-up year."

In regard to the applicant's response to the capacity concerns, the rebuttal:

- Maintains that the proposed school leader lacks qualifications in school leadership, governance, curriculum and instructional design, and performance management; and
- Contends that the Applicant Response "fails to address the issues of coherence and feasibility of the academic, organizational, and financial plans."

V. DECISION MAKING STATEMENT

Introduction.

Scope of Commissioner Review.

Applicants were advised at the beginning of the application process that the application should be a complete and accurate depiction of their proposed plan; no new information would be accepted at later stages in the application process. Responses to Requests for Clarification and answers given during the capacity interview needed to be clarifications, not new information. This is done because if applicants are constantly making significant changes to their plan during the application process, it makes it difficult for Evaluation Teams to provide a holistic review of the applicant's overall plan. The Request for Applications states that the Commission will not consider new information in making its decision. As such, Commissioners should not consider new information that was not

originally a part of the application in their review and decision-making. New information is specifically flagged in the Evaluation Team Rebuttal and, where relevant, is noted in this submittal.

Staff Recommendation Focuses on Key Points.

While the Recommendation Report, Applicant Response, and Evaluation Team Rebuttal cover a variety of issues, staff has attempted to focus on the few issues that appear to be the most significant and would have the biggest impact on an applicant's ability to successfully start and operate a high-quality charter school. The omission of an issue from this review is not meant to indicate that the staff believes that the issue was resolved one way or another, only that it is not a major point of contention or is not a critical point that warrants further analysis here. For each key point staff reaches a conclusion for the Committee's and Commission's consideration, but at a minimum the inclusion of these points in this submittal are intended to draw out the key points for an approval or denial of the application.

Applicant submitted an application during the last application cycle, but staff did not consider any information relating to any previous application cycles, including previous applications and previous submissions of public testimony. This decision was communicated in the Commission's orientation and posted on the Commission's website, so all applicants were aware that information from previous applications would not be considered.

Academic Plan.

NSMS's academic plan is not clear or fully developed.

As applicant notes, not every single detail of an academic plan and curriculum has to be described at the application stage, but staff has serious concerns when there are what appear to be significant courses without curriculum, standards, or goals (and, at times, no description of the class) and no clear plan to develop them. The applicant disputes the Evaluation Team's finding on this point and references pages from its application, including NSMS's overview and choices by subject and grade level, both of which are attached as **Exhibit D**. The Evaluation Team identified four classes for which NSMS did not provide curriculum or standards: world languages, music classes, the Friday service learning program, and an economics/social psychology class. Staff was unable to find curriculum or standards for any of these classes in the application pages NSMS cited.

As to the world language and music classes, the pages applicant references in **Exhibit D** discuss how a student may create a crowd funding campaign for world language or be required to record a song and upload it to Apple's iTunes, state that both classes promote intercultural awareness and different mediums of communication, expound on the benefits of both classes, note that both classes will be incorporated into required assignments, and indicate that completion standards will be a part of NSMS's academic standards. There is no discussion, however, of what the curriculum is and the standards by which students will be measured for either class.

As to the Friday service learning program, the application describes it as career and community service learning where students learn relevant skills by completing projects that have monetary value and support causes students believe in. The process is described as having students imitate a sample, teach students the theories surrounding the sample, and then have students create unique varieties of the sample. Student projects and the money they raise will be assessed quarterly, but there is no stated standard for the assessment provided. There are mission-wide goals for what appears to be this project, such as a statement that \$4,000 will be raised annually through student

projects, but no goals for what the individual student will be expected to have learned or mastered at the end of the project.

The economics/social psychology class is not described in the overview, but is referenced in an attachment showing a sample of the daily and weekly schedule for 7th and 8th graders, attached as **Exhibit E**. The class meets twice a week for 8th graders and takes up as much time as core classes like math and science. Staff was unable to find a description of this class or any curriculum or standards associated with the class. Although the Applicant Response states that applicant has complete descriptions of every proposed class, it still did not provide them in its response.

The Request for Applications asked applicants to provide a comprehensive curriculum overview that presented the framework for rigorous, quality instructional design. Each of the classes listed above appears to be significant; some of them are described extensively together with core classes and/or occupy as much time in the class schedule as do core classes. In the absence of standards, goals, or a description for a significant class, it is difficult to ascertain whether the curriculum is rigorous, much less quality. Staff notes that the Evaluation Team had concerns about the morning workshop, citing issues like the timing of the class and possible impacts on special needs and at-risk students. While these may be valid concerns, staff believes that the more significant issue for the morning workshop is staffing, which is discussed in more detail below. Overall, however, staff agrees with the Evaluation Team that the applicant did not provide a clear or fully developed academic plan.

The plan to implement the Blended Learning Model has not been clearly described and places the burden on the teachers to develop a plan for interfacing the online model with classroom instruction.

NSMS is proposing to use a blended learning model that uses project-based classroom instruction together with an online curriculum that can be individualized based on student needs. This is a common learning model that has been implemented in Hawaii charter schools. The applicant and Evaluation Team agree that blended learning is a viable and promising instructional model. The Evaluation Team concludes, however, that the applicant has still not clearly explained an essential piece of the academic plan: how its project-based learning curriculum and online curriculum will work together to form a cohesive academic plan.

In its response, applicant states that it understands the model it is proposing and that it used successful models in designing its own program, and it cites research on blended learning and other examples of blended model schools. What applicant does not do, however, is explain how the applicant will implement its blended learning program and how its project-based learning curriculum will interface with the online curriculum.

Staff found only two references to the design of the program that will unify the online and brick-and-mortar approaches. Page 8 of the application provides that NSMS teachers will design project-based, classroom-led lessons to build practical applications of the knowledge that is constructed in the online class. Page 13 of the application provides that the Attention, Relevance, Confidence, Success (“ARCS”) motivational design will be used to develop classroom lesson plans to integrate computer instruction and that teachers will be provided time within the school day to develop these lessons.

Staff was unable to find a plan for integration beyond the description of the fact that the teachers will be responsible for designing these lessons and that they will rely on the ARCS motivation design

to do so. Possibly this can be construed as an implementation plan, but not one that is very comprehensive.

Staff was also unable to find a description of how the online curriculum and classroom lessons will be integrated. The absence of a detailed implementation plan and description of how the two interface are not alone fatal. It appears, however, that the applicant is essentially placing the burden of creating the interface between the online curriculum and classroom lessons on its teachers and providing them with minimal support. The application does not provide a description of how the two parts interface, which would inform how teachers would be expected to develop their lesson plans. Teachers are supposed to develop these lesson plans during the school day, not during additional preparation time or as part of a dedicated curriculum development day. Given the applicant's heavy reliance on the online curriculum delivery, staff finds it troubling that the applicant does not address what appears to be a basic programmatic element, the integration of online and classroom lessons, but emphasizes the project-based learning that takes place at the proposed school. The absence of detailed integration plans or a description of how two major academic elements will interface is an indication of an undeveloped academic plan. Moreover, placing the burden on teachers to develop these plans and curriculum without adequate support poses another staffing concern, which is a recurring issue in this application and is addressed next.

Staffing.

Number of teachers not relevant.

There appears to be a dispute over the number of teachers who will staff this proposed school. The Evaluation Team, referencing a staffing chart, indicates that there will be four full-time teachers for 100 students. In its response, applicant references an organizational chart, attached here as **Exhibit E**, that applicant says shows that there eight teachers. Staff was unable to ascertain the number of teachers from the organizational chart applicant referenced, since there is a box for a "Lead Teacher" and one for "Teachers," but these boxes do not indicate how many teachers are included. While the number of teachers for the student population is an important data point, in the end staff believes that the more salient issue is the number of responsibilities each teacher will have to perform.

Teachers are given a heavy workload and a variety of responsibilities in the application.

The Evaluation Team noted that, in addition to leading core classes, teachers would have responsibility for troubleshooting technology in a technology-rich environment, for a Friday service learning component, for either a world language or music class, and for coordinating and collaborating with part-time teachers and rotating volunteers. The Evaluation Team stated that applicant did not seem to understand potential collective bargaining implications and that it was not clear the teachers would have the needed preparation time. The applicant does not respond to any of these points in its response, which instead focuses on the number of teachers on staff. Staff noted in the preceding section that, in addition to the duties listed by the Evaluation Team, teachers would also be responsible for developing the lessons that integrate the online curriculum with their classroom-led lessons.

It is unclear whether the schedule provides teachers enough preparation time. Page 49 of the application states that NSMS's schedule is better than what is provided in the master collective bargaining agreement because there are slightly fewer working hours than the standard. Page 22 of the application provides that the schedule allows for 225 minutes of prep time a week in daily 45

minute blocks, as required by the master collective bargaining agreement. Staff cannot determine whether the amount of preparation time is sufficient because it is not clear whether the teachers would have a lead role and be responsible for grading students in every class.

Applicant creates a difficult teaching environment by expecting a teacher to deliver high-quality instruction in core subjects while simultaneously troubleshooting technology for students in a technology-rich classroom. This difficulty is compounded by additionally expecting the teacher to lead a variety of non-core classes and programs, collaborate with part-time teachers and volunteers, and develop classroom lessons integrating online curriculum. While the Applicant Response does not directly address the number of responsibilities given to each teacher, it does address other positions that could alleviate the burden on teachers, such as IT support, Reading and Math Specialist, and volunteers. Based on the discussion below, however, it does not appear that these positions will provide the necessary support to these teachers.

A discrepancy in amount of IT support is irrelevant because, either way, the plan proposed does not appear to provide enough technical support.

The Evaluation Team stated that there would be no onsite technical support and that teachers would have to serve as basic technology troubleshooters. Applicant states that there is actually a .25, part-time contract IT technician that it included as a budget line item but failed to include the position in the organizational chart. Given the internal inconsistencies in the application that applicant itself points out, it is not surprising that there is a discrepancy here. Although staff was unable to locate it in the application, the applicant states that the plan provided in the application included working with other small charter schools on Oahu and the Hawaii Public Charter Schools Network to pursue hiring an IT technician to share among multiple charter schools. Even assuming this was not new information, the applicant did not specify how many hours this proposed shared IT technician would devote to NSMS and whether the technician would be onsite. In its response, applicant also describes software support provided by cloud-based networking, online curriculum, and supplemental reading and math programs and a budget for 10% overage on technical devices if technical problems arise.

Given the technology-rich environment that the applicant proposes and the heavy reliance on the online curriculum delivery method, applicant has not devoted a great deal of staff resources to technical support. Giving the applicant the benefit of the doubt, and assuming that there will be a .25 part-time IT technician on site, another IT technician for an undetermined number of hours that will be shared with other schools, and software support provided by the various software providers, it still appears that teachers would be required to provide a great deal of technical support in the classroom. The IT technician will be onsite no more than 10 hours a week, which, if evenly distributed, amounts to two hours a day. This technician would be serving the entire school and if multiple classrooms were experiencing technical difficulties, would most likely not be able to address more than one at a time. If the proposed shared IT technician matched the budgeted one for another .25, essentially doubling the amount of tech support, and assuming that the proposed shared IT technician would be onsite, the school would still only have the equivalent of one half-time position. In comparison, Carpe Diem, which applicant references as a successful program after which it models itself, has two positions dedicated to IT. While the software support sounds robust, a teacher's time would still be occupied with the software support technician while trying to resolve issues, time during which the teacher would be distracted from delivering core curriculum in the classroom. The 10% overage to create a pool of loaners is helpful, but does not, together with the other supports, provide enough relief for the teachers or give the staff confidence that there is a thoughtful plan in place for necessary technical support.

It is unclear whether the Reading and Math Specialist can support the entire school and would be well-utilized.

The Reading and Math Specialist will be a .25 part-time position that specializes in both subjects, supports the entire school and facilitates the morning workshop, which is a competency-based supplemental and support class. Morning workshop appears to serve a multitude of functions, including a study hall period, a time for targeted intervention for students that are performing below grade level, a time for gifted students to work on projects, and a time for students without internet access at home to do work. It does not appear that there will be a set number of students attending morning workshop—for some students it will be mandatory and it will be optional for others—so the number of students for whom the workshop is optional could fluctuate. At the morning workshop, the Reading and Math Specialist will be expected to provide targeted interventions to some students and supervise students with a range of abilities, from students performing below grade level to gifted students working on projects.

According to the Evaluation Team, typically people specialize in one subject or the other, but not both, and the team cast doubt on whether the skills of the Reading and Math Specialist would be well-utilized, given the structure of the morning workshop. The Applicant Response appears to indicate that the Reading and Math Specialist could serve both an evaluation and a support role because the computer programs that NSMS is proposing to use will allow for “high quality intervention programs without the reliance on direct instruction from a specialist.”

Staff is unsure whether a .25 part-time position will be able to adequately support the entire school in reading and math when the specialist will only have a little over six hours to devote to this after subtracting the time that will be consumed with the morning workshop. Even if this is enough time to support an entire school, staff is still concerned that the Reading and Math Specialist’s time would not be well-utilized during morning workshop. The Applicant Response, stating that the specialist’s role would be as an evaluator and supporter because the computer programs negate the need for direct instruction from a specialist, appears to support the Evaluation Team’s statement that the specialist’s skills are not necessary for the direct interventions that are supposed to take place during the morning workshop. Moreover, the fluid nature of morning workshop with both mandatory and optional attendees appears to create a structure where on certain days the Reading and Math Specialist could be supervising five students and on other days fifty-five students, and applicant did not address how staffing adjustments would be made to adjust to this fluidity. Staff has concerns about whether this position can provide adequate support to the entire school and its teachers and whether the allocation of the specialist’s time to the morning workshop is the best use of the specialist’s limited time.

The volunteer program is undeveloped, and it is unclear how volunteers will be integrated into the proposed school’s organizational and academic plans.

NSMS has proposed a sizeable volunteer program which requires one volunteer for every student to donate eight hours of time a month. This would mean that during the first year, the proposed school would have 100 volunteers. At maximum capacity, the proposed school would have 200 volunteers. A .25 part-time Volunteer Coordinator would be responsible for coordinating these volunteers as well as creating a volunteer orientation together with the school leader, recruiting and scheduling guest speakers, working with community partners, recruiting parent volunteers, recruiting lead volunteers for each area and grade level, defining volunteer jobs and job expectations, developing volunteer training, and maintaining volunteer records.

The role of these volunteers is unclear, as there have been varying descriptions of the program and their role at the school. The Evaluation Team characterizes the proposed school as relying heavily on volunteers. The Applicant Response states that there is no reliance on volunteers, especially not for delivery of curriculum and describes volunteers as “bonus additions to the classroom” that do “not represent a critical aspect of the school model.” These responses seem contradicted by some aspects of the application, which lists includes the requirement that parents volunteer eight hours a month as a proposed Essential Term; states that promotional material, the application and family enrollment orientation will communicate the volunteer expectation; describes the volunteers as “a core part of the school program;” lists volunteers as individuals that will develop instructional material for its music and career focus classes.

Staff has been unable to ascertain the role of these volunteers and whether the program will be a critical aspect of the school or not given the range of statements being made. The fact that the role that approximately 100 adults will play in a school, with no clear plan for implementation or reasonable staffing resources dedicated to implementation is troubling. With a smaller number of volunteers, the responsibilities being allocated to the Volunteer Coordinator would seem difficult to complete in 10 hours a week. With 100 volunteers, the situation seems unworkable, especially when one considers responsibilities that are not mentioned or assigned, like the additional administrative work relating to things like background checks and whether there is adequate staffing to supervise all of these adult volunteers.

Capacity.

The lack of capacity is evident by the undeveloped academic plan and problematic staffing plan described above. Even if the individuals have the requisite capacity, which was not demonstrated to the satisfaction of the Evaluation Team, this capacity is not evident in the documents applicant submitted.

Community Support.

Based on the testimony received at the public hearing as well as the partnerships that the proposed school has developed, it appears that there is community support for the proposed school. Community support alone, however, without a clear, comprehensive plan and capacity to develop and implement a plan, is not enough to open a charter school.

Conclusion.

Staff agrees with the Evaluation Team that a “high-quality blended learning program is not dependent on the online curriculum alone; it depends on a thoughtful staffing structure and qualified staff to implement the curriculum.” Qualified and thoughtful staff members are extremely valuable resources who should be given adequate support. Placing high expectations on teachers and staff without providing them adequate support or a clear plan does not inspire confidence in this model of a highly successful school. Staff has been unable to find evidence to conclude that the staffing plan provided by applicant is reasonable or acceptable.

VI. RECOMMENDATION

Motion to the Commission:

“Moved to recommend that the Commission deny North Shore Middle School 2013 charter school application.”

Exhibit A
Recommendation Report for NSMS



State Public Charter School Commission 2013 Recommendation Report

Charter Application for
North Shore Middle School

Submitted by
North Shore Middle School

Evaluation Team
Team Lead: Stephanie Klupinski
Evaluators: Kathy Olsen
Jeff Poentis
Kirsten Rogers
Stephanie Shipton

Introduction

In 2012, the Hawaii State Legislature passed Act 130, replacing the state's previous charter school law, Hawaii Revised Statutes ("HRS") Chapter 302B, with our new law, codified as HRS Chapter 302D. Act 130 instituted a rigorous, transparent accountability system that at the same time honors the autonomy and local decision-making of Hawaii's charter schools. The law created the State Public Charter School Commission ("Commission"), assigned it statewide chartering jurisdiction and authority, and directed it to enter into State Public Charter School Contracts ("Charter Contract") with every existing charter school and every newly approved charter school applicant.

The 2013 Request for Applications and the resulting evaluation process are rigorous, thorough, transparent, and demanding. The process is meant to ensure that charter school operators possess the capacity to implement sound strategies, practices, and methodologies. Successful applicants will clearly demonstrate high levels of expertise in the areas of education, school finance, administration, and management as well as high expectations for excellence in professional standards and student achievement.

Evaluation Process

The Commission has worked with the National Association of Charter School Authorizers ("NACSA") to develop the new charter school application evaluation process. NACSA provided its advice and expertise in creating standardized evaluation forms, providing evaluator training, and assisting with the assembly of the evaluation teams to help ensure that the Commission implements the national best practices, policies, and standards needed to authorize high-performing charter schools. The highlights of the process are as follows:

Proposal Evaluation. The evaluation teams conducted individual and group assessments of completed applications. The Commission's Operations staff conducted a completeness check to ensure evaluation teams only reviewed complete submissions.

Request for Clarification. After the initial review, the evaluation teams identified any areas of the application that required clarification. Applicants had the opportunity to respond to the evaluation teams' Request for Clarification in writing to address these issues.

External Financial Review. An external review by Charter School Business Management Inc. was conducted to answer several critical questions relating to the financial information submitted by applicants. Evaluation teams could consider these reviews when drafting their evaluation.

Capacity Interview. After reviewing each response to the Request for Clarification, the evaluation teams conducted an in-person or virtual assessment of the applicant's capacity.

Consensus Judgment. The evaluation teams came to consensus regarding whether to recommend the application for approval or denial.

The duty of the evaluation teams is to recommend approval or denial of each application based on its merits. The Commission's Operations staff is charged with reviewing this recommendation report, the testimony at public hearings, and other information obtained during the application process in making their final recommendation to the Commission. The authority and responsibility to decide whether to approve or deny each application rests with the Commissioners.

Report Contents

This Recommendation Report includes the following:

Proposal Overview

Basic information about the proposed school as presented in the application.

Recommendation

An overall judgment regarding whether the proposal meets the criteria for approval.

Evaluation

Analysis of the proposal based on four primary areas of plan development and the capacity of the applicant to execute the plan as presented:

1. Academic Plan
2. Organizational Plan
3. Financial Plan
4. Evidence of Capacity

Rating Characteristics

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

Proposal Overview

Proposed School Name

North Shore Middle School

Applicant Name

North Shore Middle School

Mission and Vision

Mission: Foster students' capacities to improve their communities, from local to global, through experiential and problem-based learning.

Vision: To create a charter middle school for the North Shore of Oahu that will prepare students for academic excellence in high school through innovative curriculum, problem-based experiential, and service learning, as well as foster a new generation of community leaders.

Geographical Area

The 60 mile coast of the North Shore of Oahu, from Kaneohe to Waipahu

Enrollment Summary

Grade Level	Number of Students					
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5	-	-	-	-	-	-
6	-	-	-	-	-	-
7	50	50	75	75	100	100
8	50	50	75	75	100	100
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
Totals	100	100	150	150	200	200

Executive Summary

North Shore Middle School

Recommendation

Deny

Summary Analysis

The Evaluation Team recommends that the application for North Shore Middle School be denied. The applicant did not meet standards in any of the four areas.

The academic plan included too many ideas without clear plans for successful implementation. For example, although the plan includes a highly-regarded online curriculum, the applicant did not demonstrate an understanding of how to successfully implement a blended learning model. The application also did not provide curriculum and standards for some classes, nor did they provide a plan for developing them. There are also outstanding concerns regarding the proposed school's morning workshop.

One organizational concern is staff structure. The proposed model relies heavily on a small staff and a large number of parent volunteers. The lack of onsite technology support is problematic given the proposed blended learning model. The application's professional development plan is not well-designed to meet the school's needs.

The financial plan lacked information in key areas. The applicant did not include proper budgeting for technological peripherals and for personnel needed to operate and maintain a technology-based curriculum.

The applicant also did not meet standards for capacity. The leadership team did not demonstrate that they had the skills and experience needed to implement the academic plan. Moreover, there are concerns regarding the applicant's ability to implement the proposed financial plan.

The applicant clearly demonstrated a need for a middle school in the North Shore. The application contains many good ideas, including a focus on service learning through community partnerships. But, the applicant needs more capacity and a better implementation plan to make the school a reality.

Summary of Section Ratings

Opening and maintaining a successful, high-performing charter school depends on having a complete, coherent plan and identifying highly capable individuals to execute that plan. It is not an endeavor for which strengths in some areas can compensate for material weakness in others.

Therefore, in order to receive a recommendation for approval, the application must Meet the Standard in all areas.

Academic Plan

Does Not Meet the Standard

Financial Plan

Does Not Meet the Standard

Organizational Plan

Does Not Meet the Standard

Evidence of Capacity

Does Not Meet the Standard

Academic Plan

North Shore Middle School

Rating

Does Not Meet the Standard

Plan Summary

The North Shore Middle School (“NSMS”) plans to provide a small, supportive, innovative learning program designed to meet Common Core Standards and to prepare students for high school and college graduation. The school will use a blended learning model that includes project-based classroom instruction, an online curriculum that can be individualized for diverse student needs, and a competency-based supplemental and support morning class (“morning workshop”). Service learning is an important part of NSMS. Students will participate in one of four career pathway groups and each group will design a project that supports a nonprofit organization. NSMS also plans to provide students with lessons on intercultural awareness and communication skills through its required music and world language programs and various after-school programs developed through community partnerships.

Analysis

The academic plan does not meet the standard of approval. There are many concerns, particularly in curriculum and instructional design, performance standards, special populations/at-risk students, and capacity.

The applicant inserts an online program into a brick-and-mortar environment. Despite the apparent quality of the chosen online curriculum, the applicant fails to fully understand and address the challenges in effectively implementing a blended learning model. A lack of cohesion exists between the online and project-based curriculum. Plans to deploy technology are not supported by research, and the applicant was unaware of the implications of not having onsite technology support. The applicant presented questionable solutions to possible scenarios around technological issues; for example, the applicant indicated that students without home internet access could use their neighbor’s internet or go to the library (although libraries in the proposed location have limited hours) in order to keep up with weekly school-work standards.

The applicant also did not provide curriculum or standards for the world languages or music classes or the Friday service learning program. The applicant could not communicate expected learning outcomes of the Friday service learning program; during the interview, they identified projects and activities for the Friday service learning program, rather than standards.

The school structure includes a morning workshop that is mandatory for students behind grade level and optional for others. Much confusion remains about the workshop; during the interview, the applicant indicated it was both like a study hall and a targeted intervention. Aside from logistical issues in managing the class, the early morning scheduling of the class placement contradicts research findings that students perform better with a later school start. The applicant stated that students required to enroll in the morning workshop would be motivated to work toward proficiency so they did not have to go to school early. But the structure of the workshop could have a disparate impact on special needs and at-risk students, who could easily fall behind and thus be required to attend. The applicant did not adequately address concerns that special needs and at-risk students would be singled out.

The applicant establishes a compelling need for a North Shore middle school and is passionate about creating a unique school. But the proposed school attempts to do too many things without having a clear plan for successful implementation. Moreover, the application team lacks the academic capacity needed to implement this plan. In particular, there are concerns about the instructional leadership capabilities of the proposed school leader.

Organizational Plan

North Shore Middle School

Rating

Does Not Meet the Standard

Plan Summary

The proposed school's governing board will meet monthly and consist of at least ten members. The board would have an initial workshop with annual board training sessions. During these workshops, members will be oriented to the mission and vision of the school; they will also review bylaws and policies.

The board will form committees, which may include members from the associated nonprofit organization, independent Friends of North Shore Charter School. The nonprofit will support the school through grant-writing, fundraising, and other activities. During the first two years, the school plans to have 8.6 full-time employees ("FTEs"), including four classroom teachers (1.0 FTE each); a 0.25 FTE volunteer coordinator; and a 0.25 reading specialist. The school will also employ part-time instructors to help with the music and world language courses.

The proposed school expects adult volunteers to represent each student and volunteer eight hours a month. If a student cannot provide a volunteer, the school will find one for the student. Volunteers will help in a variety of ways, including in core classes and the service learning program.

The school leader will develop and implement professional development. A teacher training workshop and curriculum development mapping is scheduled to begin in June 2015.

Analysis

The organizational plan does not meet the standard for approval. The application and capacity interview illustrated major weaknesses, most notably in staff structure, as the applicant appears to have unrealistic expectations for the staffing structure of the school. There is an over-reliance on volunteers and concerns with professional development.

The staffing structure is not viable. During the first two years, the application proposes only four full-time teachers, who would have responsibility for the projected enrollment of 100 students. Teachers will have to lead the core classes, which will require them to manage troubleshooting with technology. Teachers will also have responsibility for the Friday service learning component and either a world language or music class. Also, teachers will have significant management responsibilities; they will need to coordinate and collaborate with part-time teachers and rotating volunteers. The applicant did not seem to understand the implications this could have on the collective bargaining agreement. It is also not clear that teachers have the required preparation time.

Moreover, the applicant plans to hire a person who is both a specialist in reading and math. Typically specialists are in either subject. Even if a person with both specialties could be found, his or her specialized skills may not be well-utilized; the specialist is listed as a 0.25 position that facilitates the morning workshop class, which includes both 7th and 8th grade students at varying levels of academic ability. It is unclear how the specialist will have time to conduct the direct, targeted interventions hoped for by the applicant.

The school staffing plan also relies heavily on volunteers, but with an initial 0.25 designation for the volunteer coordinator, there are serious doubts regarding successful implementation of this component.

Finally, the applicant failed to address the professional development needs of a blended learning school. Teachers will need to serve as basic technology troubleshooters (as there is no onsite tech support);

they will also need to implement an online curriculum and create a technology-rich classroom. A high-quality blended learning program is not dependent on the online curriculum alone; it depends on a thoughtful staffing structure and qualified staff to implement the curriculum.

Financial Plan

North Shore Middle School

Rating

Does Not Meet the Standard

Plan Summary

The proposed school will employ Charter School Management Corporation (“CSMC”) as its back office provider.

Budgeted revenues and expenses for year one are \$739,308 and \$725,098, respectively. Budgeted revenues and expenses for year three are \$1,062,093 and \$1,061,370, respectively. The fund balance at end of year one is estimated to be \$223,390. The fund balance at end of year three is estimated to be \$326,735.

Included in the start-up year budget is an estimated \$156,950 federal Charter School Program (“CSP”) start-up grant for which the Friends of North Shore Charter School, nonprofit organization, plans on applying.

Analysis

The financial plan does not meet the standard for approval. The budget lacks information in key areas (such as technology, transportation, and personnel), and there are serious questions about the financial capacity of the applicant.

First, there is no disclosure for proper budgeting for technological peripherals and for personnel for operating and maintaining a technology-based curriculum. It is also unclear whether the financial plan includes sufficient transportation expenses for the Friday service learning component.

Additionally, the applicant relies heavily on parent volunteers; however, the applicant also indicated that the volunteer coordinator position would be cut if the school fell short of needed funding. The likelihood of such a scenario is high, and thus a critical aspect of the school model would be at risk. The applicant anticipates receiving and relies heavily on a federal CSP grant. However, the grant is very competitive, and there is no guarantee the applicant would receive the grant. The applicant offers cost-cutting as its contingency plan, including reducing the hours of non-essential employees such as the volunteer coordinator and office clerk/health aide. But, the volunteer coordinator’s salary is a low cost (the position is a 0.25 FTE for years 1 and 2), and the office clerk/health aide is not budgeted until year 3. With the already slim staff structure, the failure to obtain the grant could have significant consequences for the school.

Finally, the applicant did not demonstrate that it could implement the plan being proposed. Specific questions, such as identifying smart boards within the proposed budget, went unanswered. Some responses in the interview also contradicted statements made the application or Request for Clarification response.

Evidence of Capacity

North Shore Middle School

Rating

Does Not Meet the Standard

Plan Summary

Key members of the applicant group include Dali Pyzel, James O'Shea, and Monique Mironesco. Dali Pyzel has experience in education, business operations, management, and marketing. he would be the school leader responsible for hiring the other school employees.

James O'Shea would likely be the chair of the governing board. He has experience in information technology service management.

Monique Mironesco is an associate professor of political science at the University of Hawaii. She has experience teaching and developing online courses as well as in curriculum development.

Back-office support would be provided by Charter School Management Company. It provides services to over 130 schools nationwide, including in Hawaii.

Analysis

The capacity of the applicant does not meet the standard of approval. The instructional leadership of the school relies entirely upon the proposed school leader, Ms. Pyzel. During the interview, Ms. Pyzel was asked to share any accomplishments or achievements that pointed to her capacity as the instructional leader of the school. She was unable to provide a sufficient response. Her three years as program director at Elite Element Academy illustrates some experience in academic program development and management. Still, she lacks qualifications in major areas, including school leadership, governance, curriculum and instructional design, and performance management.

Aside from Ms. Pyzel, Ms. Mironesco also has educational experience. But she would serve as a governing board member and her academic contributions appear limited to the Friday programming. Moreover, considering the academic plan encompasses so many components, the applicant has not demonstrated that the plan is viable. Given the many responsibilities of the school leader, there are serious concerns that Ms. Pyzel exhibits the capacity to operate this academic program successfully.

The applicant also does not appear to have sufficient operations capacity. The proposed school relies too heavily on volunteers and demands much from its staff, including part-time personnel. The applicant's back-office support, CSMC, provides financial capacity. However, it was unclear where certain items were represented in the budget. Requests for information and questions during the capacity interview led to inconsistencies. CSMC appears to have the capacity to assist with the financial management of the school; however, within the application and interview process, this was not readily evident.

Evaluator Biographies

Stephanie Klupinski

Ms. Klupinski is the Commission's Organizational Performance Manager. She previously worked for the Ohio Alliance for Public Charter Schools as Vice President of Legal and Legislative Affairs. She is an accomplished author with numerous education policy publications and has been a speaker at several conferences on charter schools and charter school law. She is also a Teach for America alumnus and holds a Juris Doctorate and a Master of Public Policy.

Kathy Olsen

Ms. Olsen is currently a charter school facilities financing consultant for clients such as KIPP and the Walton Family Foundation. She has extensive experience in charter school facilities financing, including her prior position as the Director of the Educational Facilities Financing Center where she oversaw the origination of \$100 million in facilities financing for 40 charter schools. She has co-authored and edited several publications on charter school financing and was a founding member and is vice chair of the Coney Island Preparatory Public Charter School. She holds a Master of Government Administration from the University of Pennsylvania, Fels Center of Government.

Jeff Poentis

Mr. Poentis is the Commission's Financial Performance Specialist. He has extensive accounting experience and is a Certified Public Accountant with over 18 years of experience in both the private and public sectors. He holds a Bachelor of Business Administration from the University of Hawaii at Manoa.

Kirsten Rogers

Ms. Rogers is the Commission's Academic Performance Specialist. She has experience as a middle school teacher at both a charter school in Tennessee and at Wheeler Intermediate, a DOE school in Hawaii. She is a Teach for America alumnus, a former corps member advisor, and former content community leader for the organization. She also holds a Master of Education in Teaching from the University of Hawaii at Manoa.

Stephanie Shipton

Ms. Shipton is currently an Institutional Analyst at the Hawaii Department of Education in the Office of Strategic Reform. She co-authored Hawaii's ESEA Flexibility application and is currently working on a number of projects, including the Comprehensive Student Support System, implementation of Common Core State Standards, and STEM education. She has worked as a policy analyst with the National Governors Association where she worked on education policy relating to subjects like state strategies to support high quality charter schools and supporting learning outside of the school day. She has researched and written a number of education policy publications, case studies, and governor's guides and holds a Master of Political Science degree.

Charter School Business Management Inc. (External Financial Review)

CSBM is a firm experienced and focused on financial and organizational consultancy for charter schools. It is based in New York and has extensive nationwide charter school experience.

Exhibit B
Applicant Response for NSMS

North Shore Middle School's Response to the Evaluation Team's Recommendation Report

We would like to thank the charter commission staff for their time and effort in making this application process an improvement to last year's process. We understand that the staff are all very busy trying to manage the performance contract and renewal applications of the existing 33 charter schools and can only imagine the heavy burden of evaluating applications for new schools in addition to their heavy workload. However, it is to be noted that the evaluation report contains many incorrect statements that we would like to clarify.

1. Reply to Academic Plan Comments

Blended Learning Model

The first incorrect statement is that the North Shore Middle School's, NSMS, application contains too many ideas without a clear plan for implementation even though there are numerous schools that are successfully running similar blended programs across the nation that we have modeled ourselves after. The evaluation team states that NSMS "Fails to fully understand or address the challenges of running a blended learning model." NSMS fully understand the blended model they are proposing. They have used successful models in designing the program and have discussed challenges with a member of the leadership team at a nationally recognized blended school, their national consultant group who work with over 135 charter schools across the country and other experts in the field. A great example of a similarly designed, blended model, school is [Carpe Diem](#). They have been recognized nationally within, [US News and World Report Best High Schools ranking](#), [Bloomberg BusinessWeek Best High Schools ranking](#) and by [Great Schools](#). Carpe Diem High in, Yuma Arizona, has an enrollment that consists of 48% minorities and 49% of students qualify for free or reduced lunch. The school out performed their district and the state on the state exit exams and additionally, on Arizona's *Instrument to Measure Standards Test* where students met or exceeded proficiency with 97% in reading and 94% in math.¹ The data listed in the US News and World Report indicates the percentage of disadvantaged students who were proficient (93.2) and the percentage of non-disadvantaged students (95.2) only had a gap of 2% while the state average shows a gap of 34.3% with these two sub-groups. Carpe Diem uses Edgenuity, the same program proposed by NSMS, for their

¹ See <http://www.usnews.com/education/best-high-schools/arizona/districts/carpe-diem-collegiate-high-school/carpe-diem-collegiate-high-school-dba-carpe-diem-e-825> (accessed 3/12/14)

core online curriculum, and provides a divided day that consists of online learning and face-to-face instruction with their teachers in a classroom.

A report conducted by the U.S. Department of Education titled, *Evaluation of Evidence-Based Practices in Online Learning* concludes “In recent experimental and quasi-experimental studies contrasting blends of online learning and face-to-face instruction with conventional face-to-face classes, blended instruction has been more effective, providing a rationale for the effort required to design and implement blended approaches.”²

The NSMS plan to have an online and face-to-face instruction school is not new. Even in Hawaii, the largest charter school in the state uses a form of blended learning, except their 1100 students only come in one day a week for their face-to-face instruction where our school will have daily face-to-face instruction in addition to their online course work completed at school instead of relying on parents to make sure students complete their work at home. The evaluator’s report charges the school “Plans to deploy technology is not supported by research.” Yet the NSMS’s application includes 81 references to research in their 60 pages of the narrative proposal.

The reason Dali Pyzel advocated to use this model was her experience as a program director of an online school where she saw how difficult it was for many parents to stay on top of their students work at home and to create a structured school time, but at the same time saw the benefits of the differentiated instruction the online curriculum provides students for those who were putting in the required time and effort.

² See <http://www2.ed.gov/rschstat/eval/tech/evidence-based-practices/finalreport.pdf> (accessed 3/12/2014)

Tech Support

The evaluators suggest that NSMS does not have an onsite technological support when that is not true and they fail to mention any of the proposed work arounds for having only a part-time technician on site. NSMS included in their budget funding for .25 IT tech to be on campus up to two days a week.³ They also included in their plan that they intend to work with other small charter schools on island and the Charter School Network to pursue hiring a IT Technician to share between multiple charter schools. As stated in their application, leveraging the expertise of an IT technician across multiple sites is something that would be pursued within the 15 month start-up period. The proposed school also budgeted for 10% overage on all electronic devices to have loaners if technical problems arise that can not be handled until the IT tech is onsite or staff members trained to assist in certain potential IT problems. Cloud base networking and online licensed based curriculum include tech support. Previous experience working with Edgenuity, the proposed core online curriculum, found that the tech support was outstanding and responsive to school needs. Additionally, both supplemental reading and math programs used previously by the school leader, offered fast and easy tech support. The NSMS will have redundant connectivity, which means that they would pay for their regular internet connection and then have a backup which would be a USB card or Hawaiian Tel connection to be used in the rare occasion when the internet goes out. These back up models cost as little as \$35 per month and have been included in the budget. Also the quote from Edgenuity, the proposed online curriculum provider provides a media appliance that stores all the videos for the online instruction on a local cache server. This allows access to the online portion of the curriculum in the event of an internet interruption.

Home Internet Access

The evaluation team states that NSMS presented questionable solutions to possible scenarios around technological issues by responding to a question about students' internet access at home. The team suggests in their report that internet use is necessary to keep up with weekly school-work standards which it is not. Students will have time during the school day to complete their online coursework, up to half of each class period. However since students are able to access their coursework anywhere, anytime, they have the option of catching up or advancing outside of

³ See line item 162 of the budget

the normal school day. NSMS's response to the evaluators' questions regarding home internet access for those who don't have it suggested that students who do not have internet at home and needed to access it could use the library, a neighbor's or a friend's computer and/or internet access. NSMS has made it clear that students falling behind will need to attend morning workshop until they are caught up with their work. It was also proposed that through community partnerships, there is the potential for an after-school homework program for those families who would like to enroll. Public schools regularly assign homework that requires internet access, for example, at Sunset Beach Elementary School, students are expected to complete assignments at home in IXL and Kid Biz regularly. NSMS model has the students doing that work at school but if students are falling behind offers options for students to have access.

Curriculum and Standards for Some Classes

The statement that NSMS did not provide curriculum and standards for some classes is misleading. The evaluation criteria required NSMS to provide a "comprehensive overview which presents the framework for rigor, quality instructional design that reflects the needs of the proposed school's target population and is aligned with Common Core." It continues to state, "If the curriculum is developed/selected: Sound curricular choices by subject and grade level, including reasonable evidence that the proposed academic program is likely to be rigorous, engaging, and effective for the anticipated student population." (State Public Charter School Commission 2013 Evaluation Criteria, P. 3) The NSMS's overview can be found on pages 12 - 19 of the application and the choices by subject and grade level can be found in attachment B on page 136 and 137 of the application. Originally NSMS included the complete descriptions of every proposed class, but because the information was not specifically required by the application and because of the overall application page and attachment limits, these descriptions were excluded. It is also important to note that attachment B, a template provided by the commission office, had a one-page limitation for each grade level served.

Morning Workshop

The evaluation team stated they have "Outstanding concerns regarding the proposed school's morning workshop." The proposed workshop is used as a time for students who have not met grade level standards in reading and math to work on computer based support curriculum

recognized on the Federal *What Works Clearing House Clearing house Database* to be effective programs to help students reach proficiency.⁴ The time is also used as a way to provide a study period for students who are falling behind in their daily work, for gifted students who are working ahead on their online curriculum or for students who wish to work on other projects.

An article on Ed.gov talks about competency-based learning or personalized learning which transitions away from seat time, in favor of a structure that creates flexibility. There are many districts across the country that are trying to create programs moving away from traditional seat time credits toward basing seat time on achievement. The NSMS's proposed morning workshop is such a program. It does not define the success or failure of the proposed school only shows a willingness to create programs to help students achieve. There are pilot programs using competency-based learning with both state lead initiatives in New Hampshire, Michigan, and Ohio, as well as district initiatives in Chugach School District, Re-Inventing Schools Coalition, Adams County School District 50, Big Picture Learning School, and Young Women's Leadership Charter School.⁵ The proposed morning workshop is meant to motivate students to stay on track with grade level standards and rewards their efforts by allowing them to not have to attend morning workshop when successfully completing their support curriculum. The intention is to reward student achievement in a meaningful and tangible way. The morning workshop proposes to reward students who are not at grade level by assigning an effective adaptive, supplemental support program, and once the program is complete, they will not be required to attend the morning workshop. This program does not single out special needs or at risk students as the evaluators suggested. The combination of different students, with different goals, using the workshop as a resource is more inclusive than traditional public school pull-out periods for special needs and at-risk students.

Team Academic Capacity

The evaluation report states that the "leadership team did not demonstrate skills and experience needed" when the team has two Ph.D.'s one in Business Administration and the other in Political

⁴ See <http://ies.ed.gov/ncee/wwc/findwhatworks.aspx> (accessed 4/2/14)

⁵ See <http://www.ed.gov/oii-news/competency-based-learning-or-personalized-learning> (accessed 4/2/14)

Science both whom are associate professors at University of Hawaii, an IT Technology specialists with over 20 years of experience developing and managing major technology upgrades in large distributed computing environments and the largest charter school back office service provider in the country servicing schools locally in Hawaii as well as nine other states⁶

Leadership team member Dr. Mironesco, has recently created a new interdisciplinary concentration for students majoring in either Social Science or Humanities at UH West Oahu. The proposed Sustainable Community Food Systems Concentration was created through Dr. Mironesco's collaboration with MA'O Farms and Kamehameha Schools 'Aina-based Education Division. Her work designing the program included writing and being awarded a grant from Kamehameha Schools for \$132,826 for fiscal year 2013-2014. In 2008, she also developed the entire online Political Science curriculum for distance delivery to neighbor island students. She has extensive experience in delivering both online and face-to-face classes and will bring that experience to the NSMS. Leadership team member Mr. O'Shea has developed IT systems for clients who include Kaiser Permanente, General Motors and the Federal government. Leadership team member CSMC Inc. provides financial back office services for 135 schools across the country, including eight blended learning model schools. Their experience dwarves the experience of the external financial review company, Charter School Business Management Inc., used by the evaluation team. NSMS fails to comprehend how this leadership team "lacks the academic capacity needed to implement this plan" as suggested by the evaluation report.

Proposed School Leader's Academic Capacity

The evaluators stated they were concerned "about the instructional leadership capabilities of the proposed school leader." Mrs. Pyzel's education experience includes being a classroom teacher, a school librarian, and a program director of a WASC accredited online school. While being the program director, of Elite Element Academy her duties included those of a curriculum coordinator, professional development coordinator, supplemental services lead, and those of a reading and math specialist. Additionally, she was part of the hiring and application teams, conducting interviews with prospective teachers, along with student applicants and their family members. She was also responsible for conducting parent and student orientations, along with

⁶ See NSMS 2014 Charter Application, Pg 228, 232, 222, 230

trainings and various other duties required to help run a small school with an average enrollment of 100 students.

Mrs. Pyzel's experience as a business manager is best demonstrated by the success her family surfboard manufacturing business which, since 1996, her husband and her have grown to an international brand conducting business in over 15 different countries. During that time she served as chief financial officer, lead marketing agent, and chief website and online store designer which includes the creation of an iPhone application for their customers to order surfboards from anywhere in the world instantly and gives the directions to the closest dealer based on the location of a user. She also took the lead in trademarking the brand in 22 different countries, negotiating and executing three international licensing agreements, and negotiating licensing of three individual surfboard models with one of the world's largest surfboard manufacturers. Mrs. Pyzel has doubled her company's sales in recent years and sales for this year are projected to surpass \$500,000, for all of which she personally manages production. In addition to her family surfboard business, Mrs. Pyzel has helped her teenage daughter follow her dreams by assisting her in launching her own swimsuit line, [Benoa Swimwear](http://www.benoaswim.com).⁷ Mrs. Pyzel has also published a children's book in both a paperback and e-reader formats that is available on Amazon and at boutique stores in both Hawaii and California.⁸ She holds a commercial pilot's license for multi-engine commercial operations with an Instrument Rating, which further shows her capacity to handle new and challenging goals.

2. Reply to Organizational Plan Comments

Governing Board and Committees

The evaluators note the even number of the NSMS's governing board members but leave out that Act 151 does not allow the school leader to be a voting board member, therefore the board will need an odd number of voting board members. They recap the activities performed at the annual board training to include basics like orientation to the mission and vision of the school and a review of the bylaws and policies but leave out the more important aspects of annual strategic planning, goal setting, board member evaluations and other important aspects of being

⁷ See <http://www.benoaswim.com> (accessed 4/4/14)

⁸ See <http://www.amazon.com/dp/0989624005> (accessed 4/4/14)

an effective governing board such as analyzing board effectiveness, clarifying relationships between the governing board and the 501c3 support board, creating or revising job descriptions, strengthening bylaws, or training on the difference between governance vs. management.⁹

⁹ NSMS 2014 Application p. 39

Staffing Structure

The evaluation report states that the school relies on a small staff and heavily on parent volunteers and is not viable and notes staffing chart on page 306, when in fact, the organizational chart, attachment S on page 260 shows five staff members, in addition to eight teachers, and four contract positions for a total of 17 staff members at capacity for a capped enrollment of 200 students, or about 12 students per staff member and contracted employees. This ratio is not considered small among public schools in the State¹⁰. The organizational chart does not include the contract IT technician that was budgeted for a .25 position, see line item 163, which the evaluation team makes no mention of anywhere in their report. The evaluation report notes that there will only be four full-time teachers for the first two years to responsible for the enrollment of 100 students. It does not include the instructional support staff such as the reading and math specialists, music and world language experts, paid guest speakers or the partnerships with local non-profits already in place and the ones we intend to develop, all of which are included in their application. The report does not mention the contracted services provided by CSMC, Inc in its analysis of inadequate staffing even though the services provided by CSMC Inc will take the place of an additional support staff member. NSMS fails to understand how planning for staffing ratios consistent with other successful schools equates to being inadequate. Further information on the staffing plan can be found on pages 42 – 46.

Volunteers

The report states there is an over reliance on volunteers when in fact no such reliance exist. There is no reliance on volunteers for delivering any of the curriculum. They are used as support positions similar to when public schools add EA positions when extra funding is available. Those positions are bonus additions to the classroom and not required staffing. The application has a stated goal of reaching an 80% compliance with the volunteer expectation. This goal is something that the school will work towards because of the numerous benefits for the student population. In the application NSMS cites the research that shows the following benefits for students, families, and schools of parental involvement:¹¹ When parents are involved: 1) students achieve more, regardless of socio-economic status, ethnic/racial background, or the parents' education

¹⁰ See <http://arch.k12.hi.us/school/ssir/ssir.html> (accessed 4/03/14)

¹¹ Henderson & Berla, 1995; National PTA, 1998, <http://inpathways.net/6parents.pdf> (accessed 6/01/2011).

level; 2) students have higher grades and test scores, better attendance, and complete homework more consistently; 3) students have higher graduation rates and greater enrollment rates in post-secondary education; 4) educators hold higher expectations of students; 5) student achievement for disadvantaged children not only improves, but can also reach levels that are standard for middle-class children. In addition, the children who are farthest behind make the greatest gains; 6) children from diverse cultural backgrounds tend to do better by bridging the gap between the culture at home and the learning institution and finally; 7) student behaviors, such as alcohol use, violence, and antisocial behavior decrease. Studies also show that students whose parents are not involved are more likely to drop out of school. The most accurate predictor of a student's achievement in school is not income or social status, but the extent to which that student's family is able to: 1) create a home environment that encourages learning; 2) communicate high, yet reasonable, expectations for their children's achievement and future careers; and 3) become involved in their children's education at school and in the community. NSMS is designed to help promote these characteristics and conditions through parent education and participation.

These benefits of parental involvement are too great to not try to implement a program that encourages parent participation through a stated contribution expectation, support staff to help manage and a school goal to measure progress towards reaching that goal.

Reading and Math Specialist

The report raises concerns about NSMS being able to find a specialist that covers both math and reading, who will have to work with 7th and 8th graders in one class and that he or she might not have not enough time to conduct the direct targeted interventions. The programs outlined in the Federal What Works Clearing House indicates that there are four different computer programs that positively effect reading comprehension through an individual delivery method which allows teachers to take an evaluator and support role rather than the main means of instruction. The clearing house also indicate three systems that show positive effects on increasing students math proficiency one of which is a computer based individualized program where the specialists plays a support role. This data is specific to research affecting 7th and 8th grade students.¹² Data supports high quality intervention programs without the reliance on direct instruction from a specialist. The NSMS includes extensive professional development for the reading and math specialist in their plan to ensure the specialist is meeting the needs of his or her students.

Professional Development

The report stated that the “applicant failed to address the professional development needs of a blended learning school.” Yet, included in their start-up plan is a 10 day teacher training and a two week start date prior to the first day of school. This equals to 20 days of teacher professional development, collaboration and training. The school calendar also includes professional development days between each quarter. NSMS’s proposed school leader talked to blended school specialist and leadership team member from Carpe Diem, Gregg Pratt, about their professional development plan for the four schools they run. He stated that 20 days of teacher training is sufficient as long as the principal comes on board at least five months prior to the school start date and receives additional training so he or she is the site expert on the curriculum program and has the ability to have teacher trainings as needed. The proposed school’s plan also includes the school leader to come on board seven months before the projected opening day of school, two months longer than the blended learning model specialists recommended. One of the evaluators in the interview suggested that a year would be needed to properly train the teachers to deliver a program like the proposed. NSMS can not find one school that has offered a year of professional development training for all teachers to implement a blended learning

¹² See <http://ies.ed.gov/ncee/wwc/findwhatworks.aspx>

program before starting the school and feel that the evaluation team is holding NSMS to an unprecedented standard that is not matched anywhere in the US.

North Shore Middle School's Response to the Evaluation Team's Recommendation Report

3. Reply to Financial Plan Comments

The summary of the budgeted revenues shows the positive balance at the end of year one to be \$223,390. This number includes in-kind contributions, line 26, in the way of volunteer hours and does not represent an actual figure. When the balances are calculated removing the in-kind contributions they are \$172,190 at the end of year one and \$275,535 by the end of year three. If one further removes all the federal and private grants, line items 4 and 5, along with the Friends of North Shore Charter School non-profit funding component, line 13, one will remove approximately another \$110,000 per year and the positive balance would be close to \$62,000 the first year and around \$100,000 the next year with a positive increase. These numbers represent not receiving any grants or donations from the school's funding non-profit. These estimates are extremely conservative considering the non-profit has already raised over \$10,000 without a charter and has pledges for another \$21,000 for once a charter is granted and there is a plan for a dedicated grant writer. The budget includes funding for a contracted grant writer to assist with acquiring grants. Due to the proposed school's rural status, high expected enrollment of low-income qualifying students, racial diversity, focus on career learning, the agriculture program and high military population the school will qualify for many federal and private grants and will apply for ones regularly.

The evaluation team stated that the financial plan lacked information in key areas yet the NSMS utilized the required financial template provided by the Commission office and answered all the areas under section IV: Financial Plan using the evaluation criteria. The evaluation team concluded that NSMS did not use proper budgeting for technological peripherals and personnel needed to operate but that opinion is different than those opinions received from multiple different sources. First, a NSMS representative attended the Charter Network Application conference where sample budget projections were given in terms of real charter school budgets in Hawaii. These samples came from averaging three existing Hawaii charter schools together.

North Shore Middle School's Response to Evaluation Report

Then NSMS worked with CSMC Inc. the largest provider of back office services for Charter schools in the country, to further refine their budget using existing budgets from Hawaiian charter schools that they provide services for. The budget also incorporated depreciation into the totals for hard goods which made the budgeted numbers look smaller for hard goods because the cost was spread across the useful lifetime of the items. This is a standard accounting practice. The evaluation report again mentions relying heavily on parent volunteers which this application does not. They also include NSMS's response to a question asked at the interview about what they do if they fell short on their funding needs. NSMS responded that they would cut the volunteer coordinator position. The evaluation report claims that "The likelihood of such a scenario is high and thus a critical aspect of the school model would be at risk." The NSMS disagrees with both of these statements. First, they feel given their extremely conservative approach of not relying on any grants or funding from their funding source in their operational budget, that they will be able to meet their funding needs. Second, the volunteer program does not represent a critical aspect of the school model and additionally the applicant group responded to this question by saying that they could work with their community partners' volunteer coordinators if it was necessary to cut the volunteer coordinator position. The state that the "failure to obtain a grant could have significant consequences for the school" when the proposed school budget doesn't rely on any grants besides the start-up year. Given that the school already applied for the Federal Start-up grant and received excellent scores in the majority of the areas they are confident that they will be able to secure the grant this year if approved. Last years federal start-up grant not having a charter approved cost applicants 16 out of a 109 total possible points. The NSMS plans on hiring a writer this year who has already been successful at winning this grant. If the proposed school is unsuccessful in acquiring the grant this year, they could raise money through community and corporate donations, crowdfunding and if not successful, could request a one year delay in the start of the charter.

4. Reply to Evidence of Capacity Comments

The leadership team of the NSMS has the capacity to run a high quality charter contrary to the evaluation teams opinions. Last year, the evaluation team stated that SEEQS proposed school leader didn't have the capacity either and she has since shown that besides the capacity to start a charter she also has the capacity to be an advocate for charter schools in the state, evident by the

recent article on facilities funding in the Star-Advertiser. NSMS understands that it is hard to judge people's ability based on resumes that do not show specific experience in running a charter school but find it necessary to take into account the many things the the proposed leaders have been successful at. The resumes on page 219, 222, 232, and 271, the summary of CSMC Inc. experience on page 230 and the completed application along with all of the attachments, surveys, petitions, and fundraising should point to the capacity of this group.

The charter school movement started with communities getting together to fill a need that wasn't being provided. The NSMS is worried that Hawaii is allowing the continued trend of corporate dominance in the charter school movement by setting the bar at unrealistic expectation for community start-ups without well connected applicants to achieve. In their interview, when asked if NSMS had any questions, the proposed school leader asked, "is there room for community start-up charters within Act 151?" One interviewer responded that it was a concern when they were drafting the law but that ultimately they had made sure that there was room. NSMS would like to see it.

Exhibit C
Evaluation Team Rebuttal for NSMS



State Public Charter School Commission 2013 Evaluation Team Rebuttal to the Applicant Response

Charter Application for
North Shore Middle School

Submitted by
North Shore Middle School

Evaluation Team
Team Lead: Stephanie Klupinski
Evaluators: Kathy Olsen
Jeff Poentis
Kirsten Rogers
Stephanie Shipton

As the applicant for the proposed charter school North Shore Middle School (“NSMS”) has taken the time to respond to the recommendation for denial, the Evaluation Team would like to offer these statements in response to the applicant.

Academic Plan.

The Evaluation Team does not challenge the concept of blended learning. Rather, it believes that the applicant did not present a plan that would lead to the establishment of a successful blended school with a cohesive plan to connect online and project-based curricula. In the applicant’s response, the applicant highlights a well-known and well-regarded blended school, Carpe Diem, in Yuma, Arizona. There are too many differences between the applicant’s proposed blended learning program and Carpe Diem to highlight here, but one particularly relevant difference is with staffing. One concern the Evaluation Team had was with the lack of onsite technological assistance. According to its website, Carpe Diem in Yuma has six support staff employees, including two positions dedicated to information technology. The applicant did not include a full-time IT position, despite its intent to operate a school heavily dependent upon an online curriculum.

While it is true that applicants did not need to provide detailed curriculum and standards as part of the application, they were asked to provide in the alternative a comprehensive overview that presented a framework for rigorous instructional design. The applicant failed to do this for important components of their curriculum, including the Friday service learning program, music and world literature classes, and economics/social psychology class. The applicant was unable to clearly communicate the goals of the Friday service learning program, which left every member of the Evaluation Team confused. The application stated that the goals of the program were for students “to learn relevant skills by completing projects that have a monetary value and can be useful supporting causes students believe in while at the same time learning about different qualities and abilities required for different career options.” The Evaluation Team did not feel that this constituted a comprehensive overview for what appears to be an important element of the proposed school’s curriculum that takes place every Friday. Moreover, during the interview, the Evaluation Team pressed the applicant team on this issue and specifically asked about the standards and evaluation metrics for the Friday service learning program. The applicant’s response was unsatisfactory because instead of providing standards, the applicant team described activities the students could engage in.

The applicant also failed to include comprehensive overviews of the music and world literature classes, although each of these classes would be mandatory for students and taught for a total of 200 minutes a week. The original application only provides the benefits of these classes, not an overview of curriculum or standards. The applicant also included references to courses, but failed to describe the courses or explain how it fit into the proposed school’s curriculum. The original application included a reference in its weekly schedule to an “economics/social psychology” course, which would be taught twice a week for a total of 200 minutes. The applicant did not include a description of curriculum or standards for this course and did not mention this class anywhere else in the original application.

Finally, the Evaluation Team remains concerned about the educational leadership abilities of the proposed leader. Her business experience and other achievements are not in question. The qualifications provided in the applicant response do not speak to the absence of qualifications in school leadership, governance, curriculum and instructional design, and performance management, which were some of the Evaluation Team’s major areas of concerns.

Organizational Plan.

Evidence from the original application, Request for Clarification, and capacity interview support the Evaluation Team's concerns: the proposed school relies heavily on a small staff and a large number of volunteers. Applicants were asked to describe staffing structure in the original application and were required to submit a staffing chart on a template provided by the Commission. The Evaluation Team relied on this staffing chart to evaluate the proposed school's staffing. The applicant, however, now points to an organizational chart as evidence of its staffing structure. The organizational chart referenced, however, lists the types of positions in the school; it does not provide detailed information regarding how many people are employed in each type of position. Assuming *arguendo*, that the organizational chart had staffing numbers, the applicant would have provided the Evaluation Team with inconsistent staffing numbers if the numbers in the organizational chart differed from the staffing chart.

The Evaluation Team is concerned not about the use of volunteers, but about the proposed school's heavy reliance on volunteers and its failure to appreciate the challenges of managing large numbers of volunteers. Effectively managing volunteers requires continual recruitment and training. The applicant plans to hire one person on a 0.25 basis to manage an expected volunteer body of 100 people (one per student) working eight hours a month. Furthermore, the applicant also states that volunteers will not be relied upon to deliver any curriculum. However, in the original application, the application describes a scenario where, as students are working on their online curriculum, "an adult math volunteer walks around the room to answer questions." The teacher, at this same time, is reviewing (by herself) a slideshow she will later present to the class. This description, among other references in the original application, led the Evaluation Team to believe that volunteers would in fact assist with curriculum delivery. In any event, a school assembling a large number of volunteers, which the applicant describes as a "core part of the school," without a clear plan for the use, organization, or coordination of such volunteers and with the dedication of a single part-time staff person to such program is problematic.

Finally, the applicant's response did not assuage the Evaluation Team's concerns about the reading and math specialist. The applicant's response acknowledges the concern about finding a specialist in both math and reading, but does not address it. Also, the applicant's response that the specialist would play a support role in the morning workshop class contradicts the applicant's previous characterization of the role as the driver of a direct, targeted intervention.

Financial Plan.

The applicant's response does not address lack of disclosure of technology, transportation, and personnel cost and details, which is still an Evaluation Team concern.

While the original application does not characterize the reliance on volunteers as "heavy," this was inferred by the Evaluation Team for a variety of reasons—it was mentioned numerous times during the capacity interview and is evidenced throughout the original application.

While the applicant states that NSMS applied for the federal Charter School Program Grant last year and scored well on 3 of 11 sections, the Evaluation Team remains concerned that a significant percentage of the budget is dependent on a grant that was previously denied. According to the budget submitted, the grant constitutes approximately 70% of the proposed school's revenue during the start-up year. .

Evidence of Capacity.

The Evaluation Team's concerns about the applicant's capacity were not assuaged by the applicant's response. The applicant's response fails to address the issues of coherence and feasibility of the academic, organizational, and financial plans and its impact on demonstrating the capacity of the proposed school's applicant team.

Exhibit D
Pages from NSMS Application Regarding Academic Plan

Students not meeting projected gains will be identified and offered additional interventions like 1:1 or small group instruction, or the morning workshop program.

Instructional Strategies

Teachers at NSMS will be expected to effectively use data to monitor students' academic progress and evaluate instructional practices. The administration and teachers will make data collection and evaluation part of an ongoing cycle of instructional improvement. The NSMS will also expect teachers to teach students how to use their own data to set learning goals.¹⁴ These strategies are well-suited for the anticipated student population as shown in studies found on the U.S. Department of Education website, *What Works Clearinghouse*. The teachers will use effective methods and systems based on student data, best practices found on the *What Works Clearinghouse*, and other similarly well-researched resources to provide differentiated instruction that meets the needs of all students.

Program assessments will include tools to measure teacher and staff effectiveness, community partnerships, and engagement of parents. Chosen tools will allow for easy access to data in real time and performance indicators linked to job descriptions for all staff. Additionally, each staff member will be evaluated annually in compliance with contract and state requirements and regularly scheduled evaluation, both formal and informal.

The founders of the NSMS believe in the saying "what gets measured gets done" and also acknowledges that what is measured needs to matter in the context of their mission and objectives. NSMS will follow current trends in instructional data use to meet specific instructional goals and make data collection manageable for staff, students and parent/guardians. NSMS will continuously explore data collection methods and classroom tools to meet the demand for data-driven instruction while maintaining our mission and vision.

NSMS's measurable mission goals are: 1) Eighty percent of students will demonstrate a 10% higher score on the state assessment than the average same-grade level student at neighboring schools. Research of assessment data for neighboring schools show that scores dramatically decrease in both language arts and math when students transition from 6th to 7th grade, decreasing even more significantly in subsequent years through high school. NSMS believes that the school's design will support students in increasing performance rather than the current trend of decreasing state assessment performance during the middle school years. 2) Four thousand dollars will be raised annually through student projects benefitting the selected non-profit organizations for the *Cause of the Quarter* program. 3) 100% of graduating 8th graders will satisfactorily complete a student website portfolio that will include a minimum of eight different advanced technology projects within two years. It is important to note that while NSMS's goal is to have students meet or exceed all of Hawaii State standards, the school has chosen to limit its main objectives to three measurable outcomes for its beginning years. We chose these objectives because we feel that they will have the biggest carry over into students meeting the State standards and the mission and vision of the NSMS.

Section II.B: Curriculum and Instructional Design

Instructional Design- The proposed instructional design framework is a brick and mortar school that uses a blend of individualized, competency-based online instruction with advanced technology, career and

¹⁴ See <http://ies.ed.gov/ncee/www/PracticeGuide.aspx?sid=12> (Accessed 12/19/2013)

community service-based project learning. Classroom sizes will consist of approximately 25 students with a certified or highly qualified teacher and a trained parent or community volunteer. Please see Attachment B1 for a complete list of the proposed course descriptions.

Learning Environment- Block scheduling is used to provide both daily online instruction and project-based lessons in core classes on Monday through Thursday, reserving Fridays for field-based or classroom instruction related to students' respective career focus groups and community service projects. The block schedule provides for 1 hour and 42 minute classes where students will use the first or last 42 minutes to complete their individualized competency-based online course work. The remaining time will include classroom-based instruction where students will be using experiential learning by completing a project that uses the online content in a way that students can apply it to an advanced technology project, thereby learning skills used in various careers. For example, a student who finishes a lesson on a math concept might have a project to create a children's book explaining the concepts just learned suitable for a five year old and in a format ready to upload to Amazon.com and available as an e-book.

In studies on block scheduling, researchers discovered that students' grade-point averages increased in almost all subjects; students earned higher state-proficiency exam scores; students made significant improvement in ACT College Board scores; attendance improved; and more students were on time while less fights occurred because students changed classes less often¹⁵.

The motivational design of John Keller's Attention, Relevance, Confidence, Success, ARCS, will be used in developing classroom lesson plans that integrate with the computer instruction and follows the school's reconstructionist philosophy of educating to foster social change. Keller's motivational design involves structuring lessons to contain the following elements: a) Attention through using real stories, branding and challenges. b) Relevance by identifying clear benefits and relate to work situations. c) Confidence via guidance, performance and feedback. d) Success with tracking student completion of learning and praising performance. Teachers will be provided time within the school day to develop lessons, share ideas, review assessment data, and collaborate on projects and activities.

NSMS teachers will use the Common Core standards in the design of both their online and classroom based lessons and will use classroom practices such as requiring students to develop skills that build knowledge through content-rich nonfiction, reading, writing and speaking grounded in evidence from text, both literary and informational, and offering regular practice with complex text and its academic language. Common Core will also be demonstrated in math classes with skills such as developing an understanding of, and applying math relationships; developing an understanding of operations and working with equations, solving problems involving scales, and working with dimensional shapes and drawing inferences about populations based on samples.

The rationale behind the curricular choices of NSMS is that blended learning has been shown to be highly effective based on numerous studies including one reported by the Federal DOE and Highly Effective Schools showing blended learning programs to be more effective than purely online and purely face to face instruction.¹⁶ Additionally, *The National Primer on Online Learning* published by North American Council for Online Learning, evaluates the effectiveness of online education with a study comparing AP exam results from three online schools compared to the national average, resulting in a pass rate that averaged

¹⁵ See http://www.educationworld.com/a_admin/admin/admin127.shtml (accessed 11/13/13)

¹⁶ See <http://www2.ed.gov/rschstat/eval/tech/evidence-based-practices/finalreport.pdf> (Accessed 12/18/2013)

11 percentage points higher than the national average.¹⁷ Data is central to educational management and policymaking and online learning provides advantages over traditional classrooms with the easy access to a variety of quality data to make data-driven decisions.

Core Online Curriculum- The proposed instructional provider, Edgenuity (E2020), was selected after attending webinars on both Aventa and K12, talking to students and parents who used both K12 and E2020. Additionally, the proposed school leader has had previous experience with the E2020 program and found it to be rigorous and easily customized for meeting individual student needs. Extensive reporting options are also available. Edgenuity is used by other public schools in Hawaii and across the nation and is on the Hawaii DOE service provider list. Research shows students who use Edgenuity's online courses outperform their peers and are demonstrating content area success on state tests. For example, results from Rio Rancho Cyber Academy in New Mexico show that the blended model using Edgenuity courses with traditional face-to-face resulted in increased achievement in the state's standard based assessment test when compared to their state peers. The scores ranged from a slight 3 percentage points higher in 6th grade math assessments to 53 percentage points higher in 7th grade math. The range varies but averages a 27 percentage point gain in the state reading assessment and a 26 percentage point gain in the math for those students who were using Edgenuity. Finally, the program offers access to parents who can regularly check the status and progress of their children in each course, including grades on assignments, projects completed, and outstanding items.

Support Resources- For students not meeting grade level standards, NSMS will use the on-line curriculum Reading Plus as its reading intervention program to help every student achieve or exceed state standards in reading. The Federal DOE website, *What Works Clearinghouse*, indicates that students can significantly increase reading comprehension using effective reading intervention programs.¹⁸ A study on the effectiveness of Reading Plus as a large-scale intervention program evaluated the reading improvement of a broad range of students within 98 schools in the Miami-Dade County, Achievement levels, as measured by the Reading portion of the 2006 and 2007 Florida Comprehensive Assessment Test (FCAT), were used to compare improvements in reading proficiency between 9,531 participating and 19,196 non-participating students. Participating students received Reading Plus instruction for approximately six months prior to the 2007 FCAT and resulted in more than double the reading gains than non-participating students.¹⁹ A program for math intervention with similar results will also be used to achieve the NSMS's goal of increasing the math and reading scores of students who have attended NSMS for two years 10% or more over scores at neighboring feeder schools, as measured by the state assessments. During the first year, NSMS will use IXL for their math support curriculum and will assess the data to see if it allows for the anticipated gains. If the program is successful in achieving the goal, the school will continue to use IXL. If results indicate a lower than anticipated learning result, the school will research an effective alternative math program based on criteria such as research supported learning results, *suitability of activities, participant preparation, dissemination, ability to generate student learning data, and affordability.*

Instructional strategies at NSMS will include:

¹⁷ See http://www.inacol.org/cms/wp-content/uploads/2012/11/iNCL_NationalPrimerv22010-web1.pdf (Accessed 12/19/2013)

¹⁸ See <http://ies.ed.gov/ncee/www/findwhatworks.aspx> (Accessed 12/21/2013)

¹⁹ http://www.readingplus.com/index.php/download_file/-/view_inline/55 (accessed 6/28/2013)

Lectures to transmit information which supplements or enhances reading; promote understanding via explanations; respond to student misconceptions or difficulties; create or engage interest in a new area; motivate reading or other assignments.

Discussions to practice thinking and communicating in the subject/discipline; evaluate positions, arguments, or designs; defend one's own position; identify problems, conflicts and inconsistencies; get feedback from/about students; draw on students' expertise and prior knowledge.

Case studies which actively involve students in learning; apply disciplinary methods of analysis; practice problem solving; practice high-level cognitive skills (i.e., application, analysis, synthesis, evaluation); think critically; blend cognitive and affective dimensions (if the case has ethical or controversial dimensions); develop collaborative skills; relate knowledge to real world; formulate arguments and counterarguments.

Writing which develops systematic relationships among ideas; application, analysis, synthesis and evaluation; reflect on own student thinking; record the evolution of own thinking; practice disciplinary conventions (e.g., APA style); practice responding to feedback and revising.

Labs/Studios which will develop disciplinary and process skills; obtain immediate feedback and respond to it; develop metacognitive skills (e.g., awareness of own strategies); evaluate results or product of own work; approximate real life situations.

Group Projects which will compare and contrast perspectives; practice high-level cognitive skills (i.e., application, analysis, synthesis, evaluation); develop meta-skills such as leadership, communication, conflict resolution; strategize and plan how to tackle complex problems and distribute work.

Recitations where students can practice problem solving; review material; check student understanding; identify and correct misconceptions; individualize instruction; answer questions.

Public Reviews allow for evaluation; practice giving constructive feedback; self-reflection; defend vision for students' own work.

Service-Learning places emphasis on the service component of the experience and the learning outcomes for the students.

Independent Student Projects explore areas of interest in depth; conceive of, plan, and execute a research or creative project from beginning to end; work independently; seek mentorship from an expert in the field.²⁰

A daily reading period will provide an opportunity for students to read a book of their choice or complete their required daily reading. Required reading will consist of a variety of genres assigned each semester. The general guidelines for teacher selections will be two books for each of the following genres: biography, fiction, non-fiction, and historical fiction. Students will be assigned one required reading book at all times of the year, with the length of the book based on the national average reading speeds of each grade. Students will read their assigned books on their assigned e-readers and their teachers will use a management system like Amazon's Whispercast, a tool that helps organizations easily manage its Kindles and distribute Kindle content, to organize student success (Kindles for all students plus a 10% overage for loaners have been included in the budget).

Each core teacher will assign one book each semester to ensure reading across subject areas and a variety of topics.²¹ The reading period will be conducted as a sustained silent reading program, SSR. These programs have been shown to be effective in increasing students reading comprehension, vocabulary and reading attitudes when the programs include eight specific traits: a) access, b) appeal, c)

²⁰ See <http://www.cmu.edu/teaching/design/teach/design/instructionalstrategies/index.html> (Accessed 12/19/2013)

²¹ Meeting the common core major shift to building knowledge through content-rich nonfiction and regular practice with complex text and its academic language.

conducive environment, d) encouragement, e) staff training, f) non-accountability, g) follow-up activities, and h) distributed time to read (Pilgreen, 2000).²² Holt and O'Tule (1989) studied the effects of SSR on seventh and eighth grade students who were reading two years below grade level and found that students engaged in SSR had significant growth in vocabulary, comprehension and reading attitude.²³ NSMS will use SSR's best practices and document student reading gains to ensure the reading period is used to support individual student and school wide goals.

NSMS will also require its students to complete a minimum of four advanced technology projects each year, to be included in their website portfolio. Recent advances in technology provide huge advantages for those who know how to use them. Template website building software, E-readers, smart phone app building software, cloud computing, crowd funding sites, movie editing software, YouTube and endless other opportunities to learn skills needed for a 21st century career are available for free to little cost. NSMS will become a Google school using Chromebooks allowing students to do real time collaboration and share their work on the web. They will use the Google web-based management console to set up and manage users, apps and policies across classrooms, and schools. Deploying Chromebooks can save schools, on average, over \$5,200 per device over three years.²⁴ By requiring student website portfolios to include a minimum of eight different advanced technology projects within two years, our students will have an array of skills that will position them for various career options that will enable to further explore their individual interests.

Each quarter one advanced technology project will be due and assessed based on an appropriate rubric. The following are examples of advanced technology projects by subject. In Language Arts, the teacher might require students to write a children's book to be published on Amazon's kindle or Apple's eBook platform. In Science, the teacher might require students to make an animated movie on the cell cycle. In Math, students might be required to make a smart phone app game that reviews math rules or algorithms. In Social Studies, students might be required to make a movie that reenacts a historical event during present times. In Music, students might be required to record a song and upload it to Apple's iTunes. In World Language students might create a crowd funding campaign that benefits an organization that has something to do with the language or culture students are learning about. The use of student password protected website portfolios in which to take daily notes, upload projects and share other information with teachers and family privately will allow for accessible measurement of this objective.

Service Learning- Career and community service learning takes place through the required career focus groups that meet on Fridays. The idea is for students to learn relevant skills by completing projects that have a monetary value and can be useful in supporting causes students believe in while at the same time learning about different qualities and abilities required for different career options. The practice of working on projects with real world applications will provide students with opportunities to become more confident in their abilities. Providing a role model or sample, having the students imitate the sample, then teaching students the theories surrounding the sample and finally having students create unique varieties of the

²² See <http://tesl-ej.org/ej16/r14.html> (accessed 12/18/2012)

²³ See http://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=8&ved=0CFYQFjAH&url=http%3A%2F%2Fdiscoverarchive.vanderbilt.edu%2Fjspui%2Fbitstream%2F1803%2F5071%2F1%2FGanzCapstone.doc&ei=BTKyUr_aCcv6oAS864KIBA&usg=AFQjCNH8dkyOujhDiFDo4cHNDmqF6YIK9A&sig2=wMv5AspQkZ2KJWBvE4c7kA&bvm=bv.58187178,d.cGU (accessed 12/18/2013)

²⁴ See <http://www.google.com/edu/> (accessed 12/17/2013)

sample is an effective way to encourage independent creative thinkers – foundational characteristics for future leaders. In the first weeks of school, 7th graders will have lessons in Social Studies classes that address how to measure progress, what makes a non-profit effective and explore influential non-profits both locally and globally. This will be the foundation for students to select their first non-profit to support for the *Cause of the Quarter* program. Students will visit the organizations they choose to support when field work projects are available or help them by completing projects at school that benefit the organization. Fridays are set aside for this purpose and are led by guest speakers or non-profit employees and in collaboration with the classroom teacher. In addition to having students learn about how to make useful items that will support non-profit organizations, they are also learning career skills and gaining hands on experience by creating items of value. The assessment for this objective will be the quality projects students create graded quarterly and the money students are able to raise for the selected *Cause of the Quarter*.

Benefits of Service Learning - Extensive service learning research indicate dramatically positive effects on the personal development of public school youth. Examples of such research include:

- Middle and high school students who engaged in quality service-learning programs showed increases in measures of personal and social responsibility, communication and sense of educational competence (Weiler, et. al., 1998).

Service-learning provides opportunities for students to become active, positive contributors to society.

- High school students who participated in service-learning and service are more likely to be engaged in a community organization and to vote 15 years after their participation in the program than those who did not participate (Youniss, et. al., 1997; Yates and Youniss, 1998).

Service-learning helps students acquire academic skills and knowledge.

- Students in over half of the high quality service-learning schools studied showed moderate to strong positive gains on student achievement tests in language arts and/or reading, engagement in school, sense of educational accomplishment and homework completion (Weiler, et. al., 1998).

Overall, service learning for elementary and middle school students has been found to increase students' personal, interpersonal and social development (Billig 2000), increase motivation, student engagement and school attendance (Billig 2000) and, lead to new perspectives and more "positive lifestyle choices and behavior" (Civic Literacy Project 2005)²⁵.

The required music and world language classes will promote intercultural awareness and different mediums of communication as well as a host of other positive effects.

Benefits of World Language- The benefits of studying a second language include the following:²⁶

Narrows achievement gaps

- Children of color, children from economically disadvantaged backgrounds, and English Language Learners make the greatest proportionate achievement gains from foreign language study (Curtain & Dahlberg 2004).

Promotes cultural awareness and competency

²⁵ See http://sitemaker.umich.edu/356.black/benefits_of_participation_in_service (Accessed 12/18/2013)

²⁶ See http://www.sde.ct.gov/sde/lib/sde/PDF/Curriculum/Curriculum_Root_Web_Folder/BenefitsofSecondLanguage.pdf (accessed 12/18/13)

- Early foreign language study gives children unique insight into other cultures and builds their cultural competency skills in a way that no other discipline is able to do. (Curtain & Dahlberg 2004).

Higher academic progress in other subjects

- A study found students scored significantly higher in math and language arts after one semester of foreign language study 90 minutes per week (Armstrong 1997).

Benefits higher order, abstract and creative thinking

- Several studies indicate that individuals who learn a second language are more creative and better at solving complex problems than those who do not (Bamford & Mizokawa, 1991).

Benefits of Music- The benefits of studying music have been reported to have a significant impact on students' intellectual, social and personal development.²⁷ Notable research includes:

Personal and social development

- Participating in musical groups promotes friendships with like-minded people; self-confidence; social skills; social networking; a sense of belonging; team work; self-discipline; a sense of accomplishment; co-operation; responsibility; commitment; mutual support; bonding to meet group goals; increased concentration and provides an outlet for relaxation.
- Music makes a major contribution to the development of self-identity and is seen as a source of support when young people are feeling troubled or lonely.
- Music has been linked to the capacity to increase emotional sensitivity.²⁸

An article by UCLA professor James Catterall reports that:

"Music programs also show effects on student motivation — apparently because students tend to enjoy music and feel a sense of accomplishment when they become proficient with a musical instrument and with ensemble performances; and perhaps with gaining the people skills necessary to collaborate in a group performance; and also with cultural pride and identification that can result from increasing awareness of culturally embedded musical traditions."²⁹

NSMS will integrate high academic standards with resources to ensure student success. All of these components will align to Common Core State Standards because they are developed to achieve the same goals of the Common Core Standards, providing a high quality education with clear expectations, conceptual understandings and procedural practices for students, teachers, staff and communities.

Online Component- Students will complete NSMS's online component at school in the teacher-led classroom. Attendance will be taken by verification of students' presence. DOE mandated assessments will also be completed in the classroom during the normal school day to ensure students are focused during this time. Academic integrity will be maintained through classroom monitoring and data review. The role of parents in regards to the online instruction portion of the school will be minimal but will offer parents access to students online lessons and assessment scores, as well as other data in real-time.

²⁷ See http://www.laphil.com/sites/default/files/media/pdfs/shared/education/yola/susan-hallam-music-development_research.pdf (accessed 12/18/2013)

²⁸ See <http://www.issaquah.wednet.edu/documents/highschool/schedule/arts/achievement.pdf> (accessed 12/18/2013)

²⁹ See <http://www.pbs.org/wnet/tavis-smiley/tsr/dudamel-conducting-a-life/the-consequences-of-curtailling-music-education/> (accessed 12/18/2013)

Course Descriptions- NSMS has already completed a thorough description of all proposed classes. A copy of these course descriptions may be found by contacting the lead applicant as additional attachments were not allowed.

Section II.C: Pupil Performance Standards

Academic Standards- NSMS will ensure continued student achievement as measured by Strive HI including data that shows: 1) students performance in reading, math and science; 2) comparisons to similar students in other schools on how well they are improving its students' math and reading skills over time; 3) school preparation for students to graduate high school and transition into college- and being career-ready; and 4) achievement gaps between high-needs students and non-high needs students.

A standard grading system (A-F), determined by progress and scores on online curriculum classes, participation in community based service learning projects, and the quality of the website portfolio. Passing grades are D and above for online courses and scores on rubrics of 60% or higher for other assessment categories (community based service learning and website portfolios). Student progress will be reported in quarterly progress reports and semester report cards. Parent-teacher conferences will be scheduled sometime before the end of the first semester and again throughout the year based on teacher or parent request.

Pupil Performance Standard- Performance standards for students at NSMS will consist of passing all online curriculum standards (based on Common Core standards) with a 60% or above. Students will also achieve Strive HI goals and develop a website portfolio, which will include completed required assignments. These assignments will incorporate eight advanced technology projects, service learning hours, physical activity hours as well as completion standards for their world language and music classes.

Exit Policies- Promotion of students from 7th to 8th grade will necessitate the successful completion of all core classes and successful completion of website student portfolios with four advanced technology projects included in their portfolio. Promotion from 8th to 9th will include the successful completion of all core classes and completion of student portfolios that include eight advanced technology projects if students attended in 7th grade or four if students came in as 8th graders. Students and parents will be notified of promotion and graduation criteria during orientation in the beginning of each school year, in school promotional materials, and on the school website. NSMS plans for future adoption of additional academic standards beyond Strive HI through the adoption of an academic performance framework with the school governing board in year five.

Graduation policies and standards for 8th graders will follow those created by the new Strive HI system once the system is in place. For now they will include successful completion of core classes and student website portfolios.

Attachment D includes Common Core standards for 7th and 8th grade in math and ELA. NSMS will use those already developed standards and HCPS III for Social Studies and Science courses until the completion of Common Core for every core subject.

Academic Standards Beyond Strive HI- Website portfolios, advanced technology projects, service learning hours and completion standards for required reading, world language and music will all be a part of NSMS's academic standards for both 7th and 8th grade. Each quarter of 7th and 8th grade, teachers will grade students' website portfolios by using a rubric that determines what is required to be posted on each

Attachment B: Instructional Materials Chart

Developer/Publisher		Rationale for Selection or Development
Grade Level: 7th		
ELA	Edgenuity	Rigor of the course content and design, aligns to common core, increased student achievement, ability for student individualization, competency-based learning standards, diverse and real-time data reporting.
ELA	Teacher developed	Project-based lessons that align to common core lessons taught in online portion of the class but that provide additional opportunities for application of knowledge, to assess student achievement and teach application of advance technology.
Reading	Reading Plus	Research shows significant improvement in reading comprehension after only 2 months of use. This supplemental resource uses adaptive technology, which is used to have students working at their level based on previous work. Competency-based program for students not meeting grade level standards in reading and provided in the morning workshop.
Math	Edgenuity	Rigor of the course content and design, aligns to common core, increased student achievement, ability for student individualization, competency-based learning standards, data reports.
Math	Teacher developed	Project-based lessons that align to common core lessons taught in online portion of the class but that provide additional opportunities for application of knowledge, to assess student achievement and teach application of advance technology.
Math	IXL	Supplemental resource for students not meeting grade level standards in math and provided in the morning workshop. It is a adaptive competency-based program that assesses what students know and adapt lessons based on students knowledge
Science	Edgenuity and teacher team	Rigor, individualization, extended learning opportunities
Social Studies	Edgenuity and teacher team	Rigor, individualization, extended learning opportunities
Music	Teacher team, volunteers and guest speakers	Music is a significant tool for expression and provides students a medium to internalize what is being learned and the ability to share their thoughts about the content. Emphasis on cross cultural means of communication, appreciation, history, collaboration skills building, student enrichment through personal development and career exploration.
World Language		Student expression and interpersonal relationships are two key elements integrated into the foundation of this school. World languages provides a crucial element in becoming an effective communicator as well as a deeper understanding into others' cultural heritage and a way to pay respect to cultural origins.
Career Focus	Teacher Team, guest speakers and volunteers	Career exploration, service learning, problem solving and extended learning opportunities

Attachment B: Instructional Materials Chart

Developer/Publisher		Rationale for Selection or Development
Grade Level: 8th		
ELA	Edgenuity	Rigor of the course content and design, aligns to common core, increased student achievement, ability for student individualization, competency-based learning standards, diverse and real-time data reporting.
ELA	Teacher developed	Project-based lessons that align to common core lessons taught in online portion of the class but that provide additional opportunities for application of knowledge, to assess student achievement and teach application of advance technology.
Reading	Reading Plus	Research shows significant improvement in reading comprehension after only 2 months of use. This supplemental resource uses adaptive technology, which is used to have students working at their level based on previous work. Competency-based program for students not meeting grade level standards in reading and provided in the morning workshop.
Math	Edgenuity	Rigor of the course content and design, aligns to common core, increased student achievement, ability for student individualization, competency-based learning standards, data reports.
Math	Teacher developed	Project-based lessons that align to common core lessons taught in online portion of the class but that provide additional opportunities for application of knowledge, to assess student achievement and teach application of advance technology.
Math	IXL	Supplemental resource for students not meeting grade level standards in math and provided in the morning workshop. It is a adaptive competency-based program that assesses what students know and adapt lessons based on students knowledge
Science	Edgenuity and teacher team	Rigor, individualization, extended learning opportunities
Social Studies	Edgenuity and teacher team	Rigor, individualization, extended learning opportunities
Music	Teacher team, volunteers and guest speakers	Music is a significant tool for expression and provides students a medium to internalize what is being learned and the ability to share their thoughts about the content. Emphasis on cross cultural means of communication, appreciation, history, collaboration skills building, student enrichment through personal development and career exploration.
World Language		Student expression and interpersonal relationships are two key elements integrated into the foundation of this school. World languages provides a crucial element in becoming an effective communicator as well as a deeper understanding into others' cultural heritage and a way to pay respect to cultural origins.
Career Focus	Teacher Team, guest speakers and volunteers	Career exploration, service learning, problem solving and extended learning opportunities

Exhibit E
NSMS Sample Daily and Weekly Schedule

North Shore Middle School

Term Schedule

Name 7th grade A Group

Period	Monday	Tuesday	Wednesday	Thursday	Friday
Workshop 8 - 8:50	performance based	performance based	performance based	performance based	
1st: 9-10:42	Math	Science	Math	Science	Career-focus groups
Reading Period 10:50-11:15	Reading Period	Reading Period	Reading Period	Reading Period	<i>Cause of the Quarter</i> Community Service Learning Project
2nd: 11:20 - 1:02	LA	Geography	LA	Geography	
Lunch: 1:10-1:50	Lunch	Lunch	Lunch	Lunch	Lunch 12 - 12:40
3rd: 1:50 - 3:30	Music	World lang	Music	World lang	

North Shore Middle School			
Term Schedule			
Period	Monday	Tuesday	Wednesday
Workshop 8 - 8:50	Performance based	Performance based	Performance based
1st: 9-10:42	LA	economics/social psychology	LA
Reading Period 10:50-11:15	Reading Period	Reading Period	Reading Period
2nd:11:20 - 1:02	Math	Science	Math
Lunch: 1:10-1:50	Lunch	Lunch	Lunch
3rd: 1:50 - 3:30	World lang	Music	World lang

Name 8th grade A Group	
Thursday	Friday
Performance based	
economics/social psychology	Career-focus groups
Reading Period	<i>Cause of the Quarter</i>
Sciene	Community Service Learning Project
Lunch	Lunch 12 - 12:40
Music	

Exhibit F
NSMS Organizational Chart

