



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					
	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

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.