NEW CHARTER SCHOOL APPLICATION FOR

Infinity Learning Center of Montgomery County

SUBMITTED BY

Infinity Learning Center of Montgomery County

EVALUATION TEAM

TEAM LEAD: Allen Mueller
EVALUATORS: Mark Martin
Anthony Oliver

National Association of Charter School Authorizers
May 31, 2017
INTRODUCTION

Following the passage of the Alabama School Choice and Student Opportunity Act (Act 2015-3) in March 2015, Governor Bentley created the Alabama Public Charter School Commission (Commission). The mission of the eleven-member Commission is to authorize high-quality public charter schools in accordance with the powers expressly conferred on the commission in the act. To that end, the Commission executed a rigorous, high-quality process during 2017 to solicit and evaluate charter school proposals.

Focus on Quality

The 2017 Request for Proposals and the resulting evaluation process are rigorous and demanding. The process is meant to ensure that approved charter school operators possess the capacity to implement a school model that is likely to dramatically increase student outcomes. Successful applicants will demonstrate high levels of expertise and capacity in the areas of curriculum and instruction, school finance, educational and operational leadership, and non-profit governance, as well as high expectations for excellence in student achievement and professional standards. An application that merits a recommendation for approval will present a clear, realistic picture of how the school expects to operate; be detailed in how this school will raise student achievement; and inspire confidence in the applicant’s capacity to successfully implement the proposed academic and operational plans.

Evaluation Process

For the 2017 RFP cycle, the Commission partnered with the National Association of Charter School Authorizers (NACSA) to manage the application process and to provide independent, merit-based recommendations regarding whether to approve or deny each proposal. NACSA assembled an independent evaluation team that included both national and local expertise related to charter school start-up and operation. This report from the evaluation team is a culmination of the following stages of review:

PROPOSAL EVALUATION

The evaluation team conducted individual and group assessment of the merits of the proposal based on the complete written submission.

CAPACITY INTERVIEW

After reviewing the application and discussing the findings of their individual reviews, the evaluation team conducted an in-person interview to assess the team’s overall capacity to implement the proposal as written in the application.

CONSENSUS JUDGMENT

Following the capacity interview, the evaluation team came to consensus regarding whether to recommend the proposal for approval or denial. The duty of the evaluation team is to recommend approval or denial of each application based on its merits against Commission-approved evaluation criteria. The authority and responsibility to decide whether to approve or deny each application rests with the members of the Commission.

Report Contents

This evaluation 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 three primary areas of plan development and the capacity of the applicant team to execute the plan as presented:

Educational Program Design and Capacity: curriculum and instructional design; student performance standards; high school graduation requirements and post-secondary readiness; school calendar and schedule; school culture; supplemental programming; special populations and at-risk students; student recruitment and enrollment; student discipline; parent and community involvement; and educational program capacity.

Operations Plan and Capacity: legal status and governing documents; organization charts; governing board; advisory bodies; staff structure; staffing plans, hiring, management and evaluation; professional development; performance management; facilities; start-up and ongoing operations; and operations capacity.

Financial Plan and Capacity: start-up and five year budgets; cash flow projections; revenue and expenditure assumptions; financial policies and controls; and financial management capacity.
RATINGS CHARACTERISTICS

Evaluation teams assess each application against the published evaluation criteria. In general, the following definitions guide evaluator ratings:

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.

Partially Meets the Standard
The response meets the criteria in some respects, but lacks detail and/or requires additional information in one or more areas.

Does Not Meet the Standard
The response is wholly undeveloped or significantly incomplete; demonstrates lack of preparation; is unsuited to the mission of the authorizer or otherwise raises substantial concerns about the viability of the plan or the applicant’s ability to carry it out.
PROPOSAL OVERVIEW

Applicant Name:
Infinity Learning Center of Montgomery County

Proposed School Name:
Infinity Learning Center of Montgomery County

Mission:
Infinity Learning Center of Montgomery County’s mission is to provide an innovative academic program designed to inspire students to reach their highest potential.

Proposed Location:
Montgomery County Public Schools (MPS)

Enrollment Projections:

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<th>Maximum # Students</th>
<th>Grades Served</th>
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<tr>
<td>At Capacity</td>
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EXECUTIVE SUMMARY

Infinity Learning Center of Montgomery County

Recommendation:
DENY

Summary Analysis:

Infinity Learning Center’s (ILC) application partially meets the standard for approval in its educational program, operations plan, and financial plan. The plan focus on serving at-risk students appears to address a real need in the target area and board members are passionate education advocates and deeply committed to the plan and the community. Despite these strengths, it is unclear that the plan as presented contains sufficient support for struggling students.

The educational program failed to persuade the review team that it would provide struggling students with the comprehensive network of supports needed to ensure that they remain focused and on-task. More detail is needed to show how students with unstable home environments can receive equal benefit from a program that is, or can be, home-based. Similarly, although the plan to engage students in authentic learning experiences aligns with the applicant’s mission and vision, more evidence that vulnerable students are supported and have equitable and safe access to opportunities when pursuing their course credits off-campus needs to be provided.

The operations plan, while detailed, relies heavily on Education Service Provider (ESP) capacity. ESP representatives present at the capacity interview did not demonstrate the breadth and depth of skills necessary to implement the many operations services it must provide under the plan.

The financial plan also relies heavily on ESP financial capacity, which was not demonstrated during the capacity interview. It was not clear that the board conducted comprehensive research or vetting of ESP fees or record of performance to ensure that this portion of the applicant’s plan matched the passion and dedication clearly in evidence from governing board members during the interview.

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

EDUCATION PROGRAM DESIGN & CAPACITY
Partially Meets the Standard

OPERATIONS PLAN & CAPACITY
Partially Meets the Standard

FINANCIAL PLAN & CAPACITY
Partially Meets the Standard
Educational Program Design & Capacity

Infinity Learning Center of Montgomery County

Rating: Partially Meets the Standard

Plan Summary:

Infinity Learning Center (ILC) proposes serving 600 students in Grades 9-12 in Montgomery County. The applicant will target students at-risk of dropping out of high school. The instructional model is blended, with content provided through Virtual Education Solutions’ iLearn platform. Instruction will be synchronous, that is, occurring live, in real time, and asynchronous, that is, recorded content that can be consumed at any time. Students will have individual academic plans.

ILC’s program will offer three four-hour flexible sessions of instruction each school day, of which students may attend one or more. Students may take and/or complete coursework from home. Students will take dual-enrollment courses online, enroll in apprenticeships, or complete courses necessary for a license. The school year will have 190 instructional days.

School culture will be guided by four ideals: safety, relationships, teaching and learning, and the external environment. Scholastic Ventures Management Services, LLC will provide curriculum services.

Analysis:

The Educational Program Design and Capacity section partially meets the standard for approval. Although the applicant has clearly identified a target population and presents a program that is meant to serve the needs of that population, the review team was not persuaded that the evidence provided demonstrated a quality instructional design that will ensure students meet or exceed state expectations.

While the educational program presents opportunities for self-directed learning, it is not clear that at-risk students will receive the support they require to remain engaged. Although the application mentions a “team of core content teachers and their learning coach” who will work with students as they follow their individual plans, the application did not offer enough detail about how adults will know that students are struggling and how they will keep students engaged in a computer-based learning environment. Additionally, it was not clear to the review team how at-risk students, who may not have the resources, ability, or conducive environment for effective home study, would benefit equally from the ability to access course content from home.

The plan to encourage students to engage in authentic learning experiences, such as apprenticeships outside of school, is innovative, but the plan provides insufficient information on how vulnerable students will be monitored and supported off-campus. During the interview, the review team asked the applicant how the school would ensure that students with special needs, for example, would be supported in off-campus activities. While the applicant responded that they would work out these details, it was clear to the review team that these kinds of details would need to be considered before the plan would meet the standard for approval.

The ESP selected by the board to provide educational, operational, and financial services—Scholastic Ventures Management Services, LLC—failed to demonstrate that they were successful in implementing and running similar instructional programs during the capacity interview. Without evidence of this capacity, the review team determined that this section only partially meets the standard for approval.
Plan Summary:

The ILC governing board currently has four members and plans to recruit additional members from parents of students and other community members “who have a demonstrated acumen in education, finance, and community service” (Application p. 61). ILC plans to appoint a community advisory board that will include three parents, three students, two staff members, one administrator, and three community members, at least one of which will come from a local college or university.

ILC will have one principal, assisted by an assistant principal. ILC has hired Scholastic Ventures Management Services, LLC to provide the pre-startup organizational activities for the charter school. Post-approval, Scholastic Ventures will provide day-to-day management services to the school as well as all technology and non-instructional related aspects of the school, including security, custodial, marketing, and procurement assistance.

No specific facility has been identified. ILC has engaged an agent to locate a suitable facility.

Analysis:

The Operations Plan and Capacity section partially meets the standard for approval. Although the plan provides a detailed description of board structure and duties that appears to be compliant with state law, the lines of authority between the board, the ESP, and the school leader were not clear. Although the submitted organizational plan clearly delineates appropriate lines of power, the statement “The governing board, in collaboration with the EMO (Scholastic Ventures) and the principal, will be responsible for the organization and control of the school and is empowered, with consideration to the boundaries of federal and state statute, to determine the policies necessary for the effective operation and general improvement of the school” caused concern regarding the amount of power given to the ESP (Application p. 56). While a collaborative approach aligns with the applicant’s mission, control of the school must rest with the governing board. Without clearly delineated control and concomitant responsibility, the board will not be able to properly carry out its duties.

Members of the governing board attending the interview were clearly passionate and dedicated to serving an at-risk population. Many of them are professionals with great depth of capacity and talent in a number of areas, including medicine, medical administration, finance, and computer technology. One is a former public school board member and board chair. The review team found all members of the applicant team to be knowledgeable about the plan and the school’s planned target area.

However, the ESP intends to manage “facility, equipment procurement and maintenance, management consulting and financial services, insurance, educational programing, marketing and enrollment, personnel and operations support... curriculum, professional development, and technology support services,” but failed to demonstrate to the review team that it has the capacity to implement and operate all of these plan elements. When asked to provide evidence of capacity during the interview, the ESP’s CEO clarified that she does not employ full-time staff members, but would hire contractors to carry out the necessary work. The second ESP representative present mentioned leading a virtual charter school out-of-state, but the review team did not feel that this experience demonstrated the capacity to be successful at ILC, which has a very different school model.
Plan Summary:

The applicant’s ESP will provide the following financial services: purchasing, accounts payable, accounts receivable, payroll, benefits administration, and insurance.

ILC plans to borrow $400K from the ESP for start-up expenses and may borrow an additional $200K during Year One. Payment on this loan has been deferred until Year Three and will be repaid within 36 months at an interest rate of four percent. Total start-up expenses are budgeted at $263,851 of which $81,843 are personnel costs, $55K are contracted services costs, $72K are computer costs, $15K are furniture costs, $20,004 is allocated for accounting, and the same amount, $20,004, for legal expenses.

Total anticipated revenue for Year One is $2,055,414.04 growing to $4,327,187.46 by Year Five. Expenses total $1,995,041.81 in Year One, growing to $3,858,057.49 by Year Five. ILC plans to pay the ESP 20 percent of annual revenue for contracted services.

Analysis:

The Financial Plan and Capacity section partially meets the standard for approval. Although the plan describes financial procedures and policies for creating financial transparency and conducting an annual audit, the ESP did not demonstrate that they have been successful in implementing and running the financial services described in the plan at other charter schools.

Neither of the ESP representatives present at the capacity interview appeared to have specific school finance experience. During the capacity interview, the review team was unable to learn any additional information about the qualifications of those who would be hired to perform these tasks.

One proposed board member has finance experience, which should help the board monitor ESP performance for the services they provide under contract. The plan for the school to accept a start-up loan from the ESP, however, creates the potential for conflict in an environment in which the ESP’s role as a contracted service provider must be freely evaluated by the board. The review team was unable to determine whether or not the proposed loan from the ESP would be used, in part, to pay the ESP for providing services. If this is the case, more controls would need to be put in place to ensure that the services provided are truly needed and that the fee charged for the services is reasonable.

The application states that the amount paid to the ESP for services “will be 20 percent of the school's operational budget” (Application pp. 89-90). This fee is well above the industry average for the services provided and does not appear to be reasonable. During the interview, the review team asked the applicant to describe their process in vetting and selecting the ESP. The applicant’s response did not indicate that they exercised due diligence in selecting the ESP.
Evaluator’s Name

Allen Mueller

Allen Muller is a Strategic Account Executive with Vantage Learning. He is the former Executive Director of New Schools for Georgia where he supported teams of charter school applicants as they developed, started, and ran new charter schools. Allen previously ran the Office of Innovation at Atlanta Public Schools, where he directed district authorizing, supported district charter schools, and facilitated best-practice sharing between all schools in the district. Allen holds an M.A. from San Francisco State University and is A.B.D. in English Literature from University of Wisconsin–Madison.

Evaluator’s Name

Mark Martin

Mark Martin is a Resident Fellow with Jobs For the Future’s Pathways to Prosperity team. Mark just completed his third year as doctoral resident from the Harvard Graduate School of Education Leadership program (EDLD). As a Gordon M. Ambach Fellow he served with the Alabama State Department of Education’s Division of Career/Technical Education and Workforce Development during the summer of 2015. As co-founder and School Director of Langston Hughes Academy, Mark led the preK-8 charter school to six consecutive years of academic growth. He authored the proposal to build New Orleans’ first post-Katrina school, a $32 million project. He is a founding Board Member of THRIVE, Louisiana’s first urban residential school, which posted the highest academic gains in state history. Mark graduated with a B.S. in Finance from the University of Alabama and earned an MBA from the University of Georgia.

Evaluator’s Name

Anthony Oliver

Anthony Oliver is currently an Assistant Principal in the Jefferson County School System in Birmingham. Most recently Anthony served as Executive Director at Breakthrough Birmingham, an education non-profit dedicated to providing high quality academic programming to underserved students while preparing the next generation of teachers. Anthony has served as a high-school mathematics teacher and coach, and has also worked as a principal intern at Newton North High School, where he worked to create access to challenging academic curriculum for African-American students and students from low socioeconomic classes. Anthony holds a B.A. in Mathematics from the Virginia Military Institute, M.A.E. in Secondary Education-Mathematics Curriculum and Instruction from the University of Alabama at Birmingham, and a Ed. M in School Leadership from the Harvard Graduate School of Education.