New Charter School Application for
Eugene Edwards Technology Charter School

Submitted by
Just for Me Inc.

Evaluation Team
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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 2018 to solicit and evaluate charter school proposals.

Focus on Quality

The 2018 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 2018 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:

RECOMMENDATION

EVALUATION

PROPOSAL OVERVIEW

This evaluation report includes the following:

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

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.

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
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:

Just for Me Inc.

Proposed School Name:

Eugene Edwards Technology Charter School

Mission:

In order to prepare our scholars to demonstrate the mindsets and character traits necessary to impact the ever changing 21st Century global society, the Eugene Edwards Technology Charter School provides personally empowering and culturally responsive learning experiences that develop service oriented critical thinkers.

Proposed Location:

Bessemer, AL

Enrollment Projections:

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EXECUTIVE SUMMARY

Eugene Edwards Technology Charter School

Summary Analysis:

Eugene Edwards Technology Charter School’s (EETCS) proposal does not meet the standard for approval.

The evaluation team is compelled to note that EETCS’ plan is substantially similar to that of another proposal reviewed by evaluators during this application cycle. However, EETCS disclosed in the application that a considerable portion of the education plan and instructional methodology can be attributed to Legacy Charter School (formerly STAR Academy) because a consultant that the applicant has retained is a key author of both applications and the schools have an informal relationship.

The proposal partially meets the standard in the educational program and capacity section. The application identifies numerous instructional frameworks and strategies, and during the interview, the applicant provided clear, thoughtful responses to questions about the academic program. However, overall, the proposal lacks a sufficient explanation for how EETCS’ proposed strategies will be aligned to create a cohesive, rigorous educational program for students.

The proposal does not meet the standard in the operations plan and capacity section. EETCS’s governance plan is insufficient. Only three board members are identified, and they do not collectively possess the full slate of expertise to oversee a charter school. EETCS did not adequately identify clear gaps in expertise on the board, or reasonable or timely plans to recruit additional members. The staffing plan also raises concerns, because the rationale for employing both an executive director and a school leader – and the distinction between the two roles – is unclear.

The proposal partially meets the standard in the financial plan and capacity section. EETCS’ financial plan is sufficiently detailed, but as proposed, is not viable. The budget is based on combined local, state, and federal per-pupil revenues that are unrealistic, and the expected decrease in actual revenues from what is currently budgeted creates significant concerns about the plan’s viability.

Finally, the applicant team’s lack of educational and financial capacity raises concerns about the applicant’s ability to fully implement its plans. The applicant has engaged a high capacity consultant to develop its educational program and take a lead role in pre-opening activities including hiring a principal, as well as ‘executive management’ of the school moving forward, but the specific scope and terms of the consultant’s role are unclear. One board member is a mortgage broker, but otherwise the board lacks capacity for implementing or overseeing financial management.

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

Does Not Meet the Standard

FINANCIAL PLAN & CAPACITY

Partially Meets the Standard
Plan Summary:

EETCS proposes to open in 2019 with 249 students in kindergarten through second grade, growing to approximately 747 students in kindergarten through grade eight at capacity. EETCS will utilize an integrated Science, Technology, Reading, Engineering, Arts, and Mathematics (STREAM) with a focus on literacy instruction, personalized learning, and character education. EETCS is built on six institutional values: Empowerment, Equal Access, Innovative Curiosity, Authentic Experiences, Perseverance and Follow-Through, and Collaboration and Diversity. EETCS' instructional model will encompass elements of expeditionary learning, project based learning, design thinking and personalization.

EETCS offers an extended day and extended academic year for its students. The school day runs from 7:40 am until 3:30 pm Monday through Thursday. Every Friday, school releases at 12:30 pm for students, allowing for staff professional development during the second half of the day.

EETCS will encourage a positive culture that feels safe and respectful through Positive Intervention and Behavior Supports (PBIS) and EETCS' POWER values: Perseverance, Ownership, Wonder, Everything with Excellence, and Respect.

Analysis:

The Education Program Design and Capacity section partially meets the standard for approval.

It is important to recognize that the content of the EETCS plan is substantially similar to that of another proposal reviewed by evaluators during this application cycle. However, EETCS disclosed in its application that a considerable portion of the education plan and instructional methodology can be attributed to Legacy Prep Charter School (formerly STAR Academy). During the interview, the team disclosed that one if its key members, a hired consultant who played a lead role in developing the EETCS education program design, is married to the principal of Legacy Prep Charter School and was one of the authors of its charter application. Although the schools will have no formal relationship, the intent is for the schools to be in close collaboration.

EETCS' curricular and instructional program partially meets the standard. The application identifies numerous instructional frameworks and strategies but lacks a sufficient explanation for how the strategies are aligned to create a cohesive, rigorous educational program for students. For instance, the application describes “platooning,” a strategy whereby teachers are experts in one or two areas rather than generalists; it is not clear how thematic, project-based learning – another of the primary approaches described -- is supported in a platooning model. During the interview, the applicant provided clear, thoughtful responses to questions about the academic program, and in particular resolved questions about how the school will implement project-based learning and personalization. Still, other interview responses raised even more questions, and demonstrated that there are elements of the plan that are still underdeveloped. For example, the applicant described that interventions for students who require remediation will be primarily offered after school through tutoring staffed by teachers on a rotating basis. As presented, this strategy is not sufficient for ensuring EETCS’ student population will meet or exceed standards.

Finally, the applicant lacks the collective qualifications and capacity to implement the education plan successfully. EETCS engaged a consultant, Mr. Ruben Morris of Education Innovation Solutions Consultants, LLC (EIS), to design its educational program. During the interview, Mr. Morris demonstrated fluency with elements of the plan and that he has the knowledge, skills, and background to lead the implementation of a quality academic program. However, a primary concern is that other members of the EETCS team demonstrate limited experience in K-12 education, charter schools, or school start-up, and did not substantively contribute to the discussion of the school's education program during the interview. EETCS plans to hire a principal and a director of teaching and learning who will primarily be responsible for implementing the educational program; however, these individuals are not yet identified, and the applicant did not provide a robust recruitment plan to find these individuals or onboarding program to train them. As such, the team only partially meets the criteria in this area.
Plan Summary:

EETCS is proposed by Just for Me, Inc., in partnership with Save the Youth, Inc. EETCS currently has three board members and is interviewing to fill two additional board openings. Dr. Charnetta Gadling-Cole is listed as the founder of the school, and leads Just for Me, Inc.; Dr. Cole will not be an EETCS board member.

The EETCS board will hold regular meetings at least once a month during the school year. The board will convene an Education Advisory Board, consisting of six current or retired educators.

EETCS’s leadership team is comprised of a school leader, operations manager/director of development, director of academic success and innovation, and village directors. During Year 1, the school will employ five administrators including an executive director, school leader, director of teaching and learning, and two village directors. The proposal also includes plans for an executive director.

EETCS is currently in purchase negotiations and lease negotiations with Grace Life Baptist Church for shared occupancy of their church facility.

Analysis:

The Operations Plan and Capacity section does not meet the standard for approval. Although the applicant provided some important clarification and detail during the capacity interview, governance and staffing plans remain unclear and the team does not demonstrate adequate operational capacity.

EETCS’s governance plan is insufficient. Only three board members are identified, and they do not collectively possess the full slate of expertise required to effectively oversee a charter school. The applicant did not adequately identify expertise gaps on its board, or reasonable or timely plans to recruit additional members. Additionally, the proposal indicates that the three founding board members may join the school governing board, creating confusion about who would ultimately govern the school. EETCS has developed an education advisory committee, and while it is prudent to engage advisors with K-12 education capacity, it remains unclear what the committee’s role or authority is, and why these members are not engaged as full board members.

EETCS’ staffing plan is a concern. The proposal narrative indicates that the school will employ both a school leader and an executive director (ED) in Year 1, yet the proposal includes limited detail regarding the ED’s role or responsibilities, hiring process or timeline, or a job description, except to say that that upon approval, all school management will be delegated to the Executive Director. The ED is not included in the description of the school’s leadership team, raising questions for the evaluation team about whether the position is essential. Statements describing the delineation of responsibilities between the ED and school leader are confusing. For example, the proposal states that the board will delegate all school management to the ED but that the school leader will be ultimately responsible for the implementation of all school operations. During the interview, the applicant provided some clarity that the ED is an external-facing role (i.e. fundraising, board engagement), but did not substantiate the need or rationale for employing both an ED and a school leader in Year 1, nor definitively delineate between ED and school leader roles and responsibilities.

The evaluation team is also concerned about an apparent conflict with the school’s facility plans. The proposal states that a memorandum of understanding (MOU) for use of the Grace Life Baptist Church facility is included in Attachment 21. Instead of an MOU, Attachment 21 includes a letter from a mortgage broker indicating that facility financing is likely. Of concern is that the broker who signed the letter is a board member; thus, there appears to be a conflict of interest which was not addressed by the applicant. Moreover, the proposal does not include a discussion of the facility’s viability, including why it was selected, whether and how well it accommodates EETCS’ space needs, and whether it will require renovations.
FINANCIAL PLAN & CAPACITY

Eugene Edwards Technology Charter School

Plan Summary:

In Year 1 the ED will be responsible for working with the finance committee of the board – with input from school staff – to prepare the annual budget; in Year 2 and beyond the school leader will develop the school budget. Variance reports will be prepared and sent to the board quarterly. The ED will sign all checks and approve purchases; checks in excess of $5,000 will require the second signature of a board member. The ED will be responsible for day-to-day financial management of the school, and the school leader will meet quarterly with the Finance Committee to review financials.

EETCS’ startup (Year 0) budget assumes a startup line of credit for $800,000 and expenses totaling $701,633.00. EETCS operates with a positive fund balance in each of its first five years of operation. In Year 1, total revenues are projected at $3,706,821.00 and expenses at $2,840,132.00. In Year 5, total revenues are projected at $6,225,019.00 and expenses at $5,977,692.00.

In each of the school’s first five years of operation, $50,000 in total board contributions or donations are expected.

Analysis:

The Financial Plan and Capacity section partially meets the standard for approval. EETCS provided a detailed budget narrative, startup budget, and five-year financial plans, however, unreasonable revenue assumptions raise concerns about the budget’s viability. The EETCS team demonstrates limited financial capacity and roles and responsibilities for financial management are unclear.

EETCS’ financial plans are comprehensive and detailed, and account for key expenses aligned to its proposed educational program. However, EETCS’ financial plan is not viable as proposed because it is based on combined local, state, and federal per-pupil revenues of $13,403.00, which is substantially higher than what will be funded in Bessemer (the review committee understands the amount would be in the range of $8,500-$9,000). Even though the financial plan shows the school running a positive fund balance in each of the first five years, the expected decrease in actual revenues from what is currently budgeted create significant concerns about the plan’s viability. During the capacity interview, EETCS confirmed the expectation of $50,000 in fundraising to be raised annually from board members; this high threshold is a concern given that only three members are currently identified and at least one additional member will be a parent representative.

The applicant clearly established that the school will ensure financial transparency, including plans for public adoption of the school budget and public dissemination of the annual audit report and monthly financials. Although the proposal includes assurances of proper financial controls, the applicant did not provide comprehensive financial procedures or policies, and it is not clear that the operator will have sound systems, policies, and processes for financial planning, accounting, purchasing, and payroll. Roles and responsibilities related to financial management are appropriately delineated between the board and school staff, but delineation among staff roles is unclear, particularly between the ED and school leader. The narrative toggles back and forth between the two, stating that the ED will be responsible for financial management, and the school leader for day-to-day financial management and for meeting regularly with the finance committee. Because no job description is provided for the ED it is unclear what his/her responsibilities or required qualifications are with respect to financial management.

As it relates to financial management capacity, EETCS has identified a board treasurer who is a professional lender/mortgage broker. However, no additional members of the board are identified to have professional financial management capacity. No financial capacity has been established at school level because the applicant has not identified school-level staff, and as stated above, the proposal does not include a job description or a description of the desired qualifications and/or expertise for the ED.
EVALUATOR BIOGRAPHIES

Evaluator's Name

Beth Seling

Beth Seling is an independent consultant specializing in charter school startup and authorization. She began her career with the KIPP Foundation, supporting the organization’s expansion as it grew from two flagship schools to 68 schools across the U.S. After KIPP, Beth joined Chicago Public Schools as their senior director of recruitment and selection in the district’s charter schools office. In that position, she directed the evaluation of new charter and turnaround schools under the Renaissance 2010 Chicago school reform initiative. Most recently, Beth was the founding Chief Operating Officer of 4.0 Schools, a New Orleans-based incubator of new schools, education services, and technologies. Beth consults with authorizers and organizations nationwide on developing and instituting high quality authorizing practices, evaluating authorizer practice, capacity building, and strategic planning.

Evaluator's Name

Dr. Iris Palazesi

Dr. Palazesi is an independent education consultant specializing in the areas of charter school applications, grant applications, and educational research. She has worked successfully with clients to secure over $21M in grant awards and over eighty approved charter school applications. Dr. Palazesi served on the board of directors of a high-performing charter school in Tallahassee, Florida for nine years, including four years as board chair. Dr. Palazesi has also worked for the Florida Department of Education as a Program Specialist for Gifted Students, Supervisor of Exceptional Student Education Services, and Interim Administrator for Title I. Prior to moving to Florida, Dr. Palazesi was a university professor at Ball State University in Muncie, IN and Thomas College in Thomasville, GA. Dr. Palazesi earned her B.A. in Elementary Education from the University of Illinois; her Master’s degree in Gifted Education from Northeastern Illinois University in Chicago; and her Doctoral degree from the University of Illinois.

Evaluator's Name

Rachel Ksenyak

Rachel Ksenyak is a Denver-based education consultant with a decade of experience in charter school authorizing, program development, strategy, and human capital. Rachel served as the Senior Director of Talent for STRIVE Preparatory Schools, where she was responsible for recruiting and hiring excellent teachers, leaders, and staff to serve more than 3,500 students. Rachel was the Senior Director of Recruitment and Selection for the Office of New Schools at Chicago Public Schools, where she managed the recruitment, selection, and authorization of new charter, turnaround, and other autonomous schools. Rachel also served as the Director of Authorizer Development at NACSA, providing strategic counsel to public school districts, nonprofits, and state education agencies across the country. Rachel is a founding board member of 5280 High School in Denver. Rachel earned an M.Ed. in educational leadership from the Broad Residency in Urban Education, an M.A. in the social sciences from the University of Chicago, and a B.F.A. in dance from Ohio University.