



Unification Plan Presentation

August 30, 2016

Orleans Parish School Board Meeting

Agenda



- ▶ **The opportunity of unification**
- ▶ Summary overview of the plan
- ▶ The path forward



An historic opportunity

- ▶ **We are here to discuss the plan to create a public education system in New Orleans that is the first of its kind in the US:**
 - ▶ A district of almost all charter schools
 - ▶ With a democratically-elected School Board
 - ▶ Empowering families with choice
 - ▶ Empowering educators to run schools
 - ▶ Ensuring equity for all students
 - ▶ **Dedicated to the vision that every New Orleans child in every neighborhood should have access to great public schools**

Our plan is guided by five principles that have been validated through our discussions with the community



- ▶ **High Standards:** Every child in every neighborhood should have access to great public schools
- ▶ **Continued Progress:** We cannot be comfortable with the gains of the last 10 years; we must continually raise expectations, expand what is working, and cultivate new leaders and new ideas
- ▶ **Choice for Families:** Every family should have access to a diverse set of school options for their child through a clear and fair process
- ▶ **Ensuring Equity:** Differentiated resources and attention must go to ensuring that schools are succeeding for each individual student, based on his or her unique gifts, talents, and needs
- ▶ **Empowering Schools and their Communities:** Educators closest to students and families are empowered to make instructional decisions, and the community has a transparent understanding of their school options, the progress being made, and the way in which funds are being used

These guiding principles define a unique role for OPSB



What Schools Do

- ▶ Make all curriculum and instructional decisions, based on the best interests of their students
- ▶ Provide training and support to educators and staff
- ▶ Make all personnel decisions consistent with their mission
- ▶ Control their own budgets, including (increasingly) facilities planning

What the District Does

- ▶ Promote standards of school quality that create a focus on improvement and equity
- ▶ Monitor school performance, and take action when needed
- ▶ Work to develop new schools and programs for students and/or neighborhoods that need better options
- ▶ Promote choice and equity through Enrollment and other citywide programs
- ▶ Set policy that directs school and facilities funding to reflect student and citywide needs

We have received extensive input from the community over the past three months



We have engaged more than 500 people in the planning process since June, in a variety of settings:

- ▶ **Four public meetings of the Advisory Committee**, including presentation of a draft plan in July and subsequent opportunities for public comment through public meetings, office hours, and our website
- ▶ **Over 250 community members** participated in four community meetings in July and August
- ▶ **More than 100 leaders were invited to eight Task Force meetings**, convened in June and August to focus on Authorization, Accountability, and Planning; Facilities; Systemwide Services; and Transparency
- ▶ **Focus groups with parents and educators**
- ▶ **Meetings with Charter Board Chairs, School Leaders, elected officials, clergy, and community groups**

We are committed to continuing deep engagement throughout the transition process



Our Commitment

Purpose

Beginning
Fall 2016

**Citywide Vision and
Strategic Goals Task
Force**

- ▶ Build off themes from community meetings to-date
- ▶ Help articulate a vision for the future of public education in New Orleans and OPSB's role in supporting that vision

Monthly

**Public Engagement
Opportunities**

- ▶ Provide opportunities for the public to be involved in specific decisions related to unification (e.g., accountability)

Quarterly:

Nov 29
Feb 16
May 25
@ OPSB

**Unification Advisory
Committee Meetings**

- ▶ Report on progress against quarterly milestones
- ▶ Gather community feedback and discuss key issues

We are ready for the work ahead



- ▶ **Strong OPSB leadership team**
- ▶ **Aligning our approach to accountability**
- ▶ **Readiness for hard decisions**
- ▶ **Financially sustainable structure**
- ▶ **Clear roadmap of the work to be done**

Agenda



- ▶ The opportunity of unification

- ▶ **Summary overview of the plan**

- ▶ The path forward

This plan marks the first key milestone in a two-year transition process



- ▶ Act 91 requires:
 - ▶ 13-member Advisory Committee of school and community leaders
 - ▶ “Unification Transition Process Plan” presented to OPSB by September 1
- ▶ In addition, we have conducted task forces, community meetings, focus groups, and other engagement efforts
- ▶ OPSB continues to prepare to serve all schools and families:
 - ▶ Organizational transformation
 - ▶ New policies to support transition plan
 - ▶ Ongoing community engagement
- ▶ Some schools will continue gradual and voluntary transfer over this time period (like the four schools that just returned)
- ▶ OPSB and schools move forward together under unified local governance
 - ▶ OPSB and/or BESE have the authority to delay unification by one year, based on specified triggers identified in Act 91

Our final plan includes six main sections



1. Guiding Principles for Unification
2. Strategic Priorities
3. Policy and Operational Decisions
4. Organizational Capabilities
5. Budget Implications
6. Timeline and Responsibilities

Strategic Priorities

Our strategic priorities relate directly to some of the most important and urgent work we will begin



Our Strategic Priorities...

- ▶ Uphold stringent standards for school authorization, performance, and accountability
- ▶ Ensure citywide services and policies address equity issues for all students
- ▶ Be financially efficient and operationally lean
- ▶ Ensure that facilities are well maintained
- ▶ Collaborate with stakeholders to define policies in the best interest of students
- ▶ Set long-term goals and a vision for a unified school district by engaging our community

... Inform the Work to be Done

- ▶ Creation of a modified school performance framework, charter operating agreement, and related Board policies
- ▶ Responsible transition of EnrollNOLA and other citywide services
- ▶ Restructuring of OPSB central office to focus on citywide needs
- ▶ Alignment of maintenance standards and launch of facilities preservation fund
- ▶ Detailed set of policy decisions defined for next two years
- ▶ Citywide Vision and Strategic Goals Task Force to be launched in 2016-17

Policy and Operational Decisions

The unification plan lays out key decisions that need to be made over the course of the next two years



Policy and operational decisions are organized according to key capabilities:

Portfolio
Management

Citywide
Services and
Enrollment

Facilities

Finance and
Operations

LEA
Responsibilities



- ▶ For each of the decisions identified in the plan, we also provide a quarter-by-quarter timeline to achieve key milestones, so that the community has the transparency required to hold us accountable for continued progress
- ▶ The Board will be ultimately responsible for vetting and approving any formal policy proposals as they are developed

Organizational Capabilities

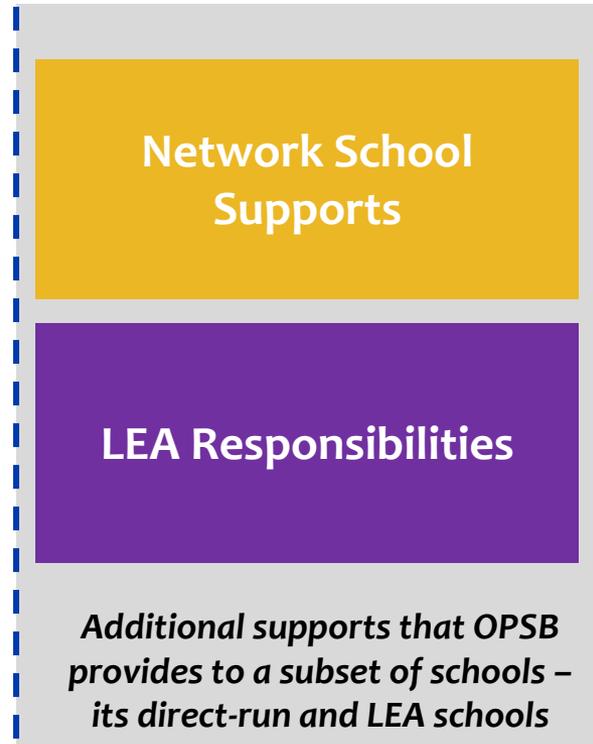
Our plan highlights key capabilities that will be critical to OPSB's success as a unified district



The Orleans Parish School Board has a policy-making role that spans all of these functions



Supports and services that serve all schools and families citywide



Organizational Capabilities

Effective authorization, accountability, and planning is at the heart of strong “portfolio management”



Portfolio Management

- ▶ As the authorizer of public schools for the city, OPSB aims to provide great schools for every child in every neighborhood and diverse options for all families

Accountability

- ▶ Our School Performance Framework must:
 - ▶ Reflect high standards as we strive for mastery
 - ▶ Recognize an important role for student growth
 - ▶ Appropriately differentiate for alternative schools and turnaround situations
 - ▶ Monitor issues of equity in areas such as enrollment and special education

Authorization

- ▶ The Superintendent will have the authority to recommend decisions, subject to a 2/3rds Board override:
 - ▶ Authorize new schools
 - ▶ Renew schools that are currently operating
 - ▶ Close schools that fail to meet established standards
- ▶ OPSB may also publicly elevate monitoring issues such as enrollment, special education, or Charter Board governance

Planning

- ▶ Planning (e.g. for new schools) is a collaborative process that involves many stakeholders:
 - ▶ Community input
 - ▶ Demographic and school performance data from our Strategy team
 - ▶ Enrollment data from EnrollNOLA
 - ▶ Building quality and utilization from our Facilities team

Organizational Capabilities

The OPSB portfolio today contains different categories of support for different kinds of schools



	Charter Schools with LEA Status	Charter Schools in OPSB's LEA	Network Schools
Citywide Functions (e.g. Portfolio Mgmt, Enrollment, Facilities)	✓	✓	✓
LEA Responsibilities	Provided by School / CMO	✓	✓
Instructional and Operations Support	Provided by School / CMO	Provided by School / CMO	✓

Organizational Capabilities

A key early milestone of the plan is to help schools and stakeholders understand the implications of LEA status



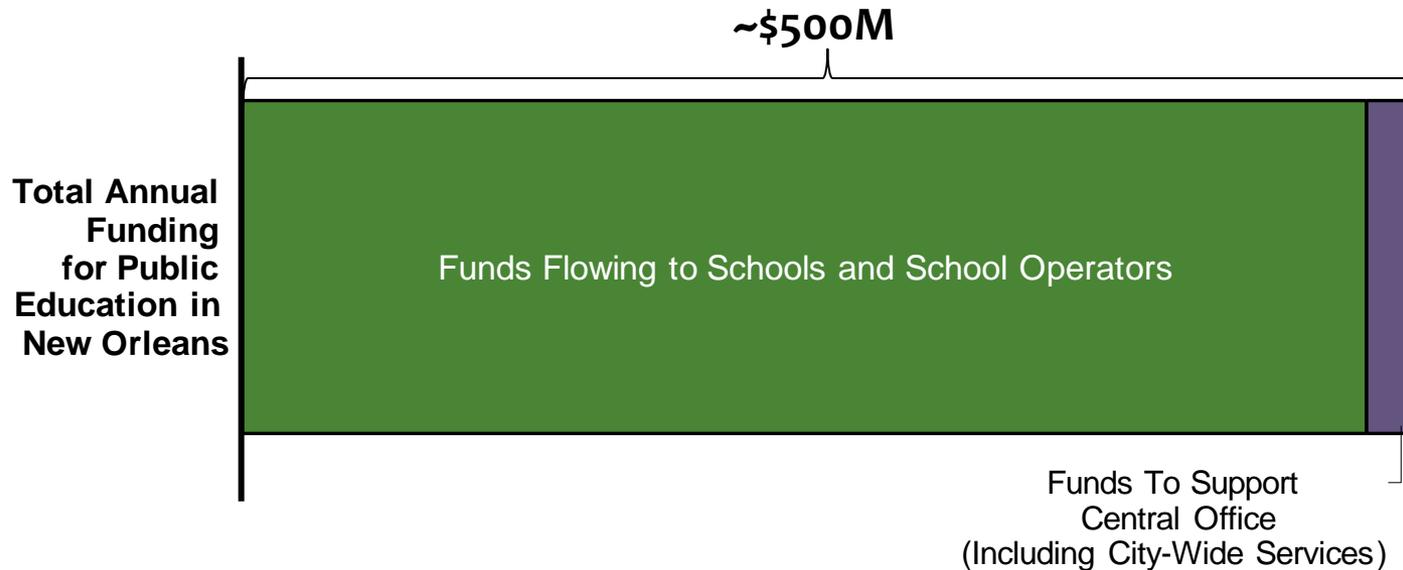
LEA
Responsibilities

Network
School
Supports

- ▶ In 2016-17, we need to work with our schools and stakeholders to create a more transparent understanding of our work as an LEA:
 - ▶ What supports will OPSB provide to schools in its LEA?
 - ▶ What are the costs of those supports – to the school and to OPSB?
 - ▶ What are the implications of a decision for a school to exit OPSB's LEA?
- ▶ OPSB will support all schools in making an informed choice, and help the Board understand the potential financial impact on the district
 - ▶ This analysis will likely imply a need for restructuring of LEA offices, including the Special Education function
- ▶ Our financial plan will ensure that OPSB is structured to be sustainable and effective regardless of schools' decision on their LEA status

Budget Implications

Of ~\$500M for public education in the city, roughly ~\$20M is available for central office and citywide services



This ~\$20M to support central office and citywide services includes the 2% admin fee for all schools, funding from Harrah's, and some other ancillary revenues

Budget Implications

Half of this \$20M goes to support services for students and families



What do we mean by central office and citywide services?



- ▶ **About half of all revenue goes directly to serve students and families**, in the form of services like EnrollNOLA and programs like the Therapeutic Day Program, Youth Opportunity Center, etc. that schools alone cannot provide



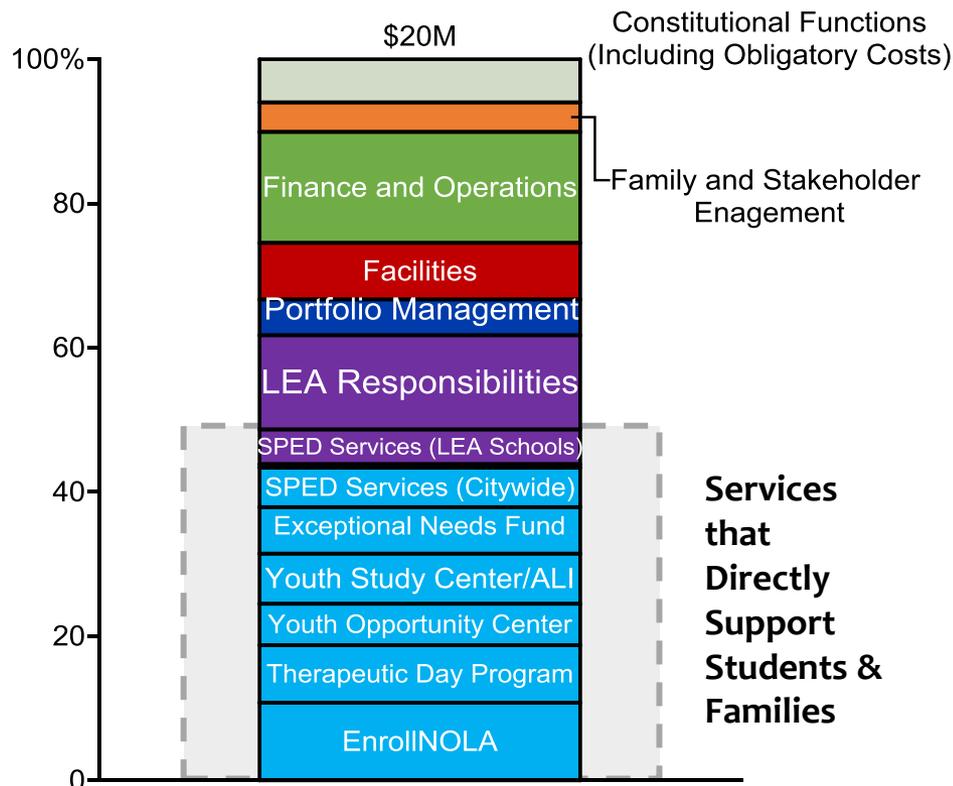
- ▶ **The other half goes to a limited central office team**, to lead key systemwide work like portfolio management, facilities, family engagement, and finance

Budget Implications

The plan includes a financially sustainable scenario for how OPSB would succeed as a unified district



Estimated 2018-19 Budget for
OPSB Central Office and Citywide Services



This structure:

- ▶ Fulfills the core capabilities that OPSB must excel in
- ▶ Maximizes dollars that flows directly to students and schools
- ▶ Meets strategic priority of being financially efficient and operationally lean
- ▶ Does not rely upon the district's fund balance reserve or other one-time revenues
- ▶ Continues the restructuring work that OPSB has undertaken in the last year

We will work with the Board over the next two years on specific decisions to put this structure into place

Agenda



- ▶ The opportunity of unification
- ▶ Summary overview of the plan
- ▶ **The path forward**

We are beginning to invest now in building the capacity to support unification



Unification will be a gradual process – not a sudden shift

- ▶ **Use the Unification Fund to strengthen our capabilities in Portfolio and Facilities:**
 - ▶ Invest in capacity to focus on policy and implementation for the School Facilities Preservation Fund
 - ▶ Take on coordination of Early Childhood work in partnership with NOEEN
 - ▶ Increase capacity within the Portfolio team to focus on Alternative Schools, including our work with the ALI and YSC programs
 - ▶ Increase capabilities in our Data and Analytics team to be able to manage citywide analysis for portfolio planning and other purposes

- ▶ **OPSB and RSD are also committed to a responsible transition of EnrollNOLA:**
 - ▶ Development of a transition plan specifically for EnrollNOLA functions by December 2016
 - ▶ Throughout this period, ensure a comprehensive expulsion and re-entry program

Over time, we will continue to engage the community on the resources required to serve all students



- ▶ **Our plan is financially sustainable, but involves tradeoffs**
 - ▶ Limited ability to engage in new and emerging community priorities or to absorb unexpected costs
 - ▶ Reliance on non-profit sector to support key citywide services on an ongoing basis

- ▶ **We also know – and our community engagement has reinforced – that our students have many needs that are not being fully met by the services available to them today**

- ▶ **This points to the need for continued engagement and leadership**
 - ▶ Build a shared vision of citywide needs for public education
 - ▶ Understand the resources required to meet those needs
 - ▶ Work with stakeholders to align citywide priorities with the resources available to deliver



Recap: Key Themes

- ▶ **A unified district in New Orleans will be the first of its kind in the nation:** a district of almost all charter schools, with a locally-elected Board, dedicated to empowering families, empowering educators, ensuring equity, and **dramatically improving student outcomes**
- ▶ **This plan reflects extensive input from the community,** which will continue over the next two years in preparing for unification
- ▶ **Unification calls for OPSB to be the authorizer for all public schools in New Orleans,** and OPSB is committed to making hard decisions about school openings and closures, driving continual improvement through school turnarounds, and ensuring that we are providing the right choices for our students
- ▶ **We have a clear view of the work to be done over the next two years** to make unification a reality, and offer this plan with clear quarterly milestones in order to allow the community to hold us accountable for progress



Appendix:

Statutory Delay Triggers Implementation Timeline Details

Appendix

Act 91 Process Requirements



1. The Unification Plan must include certain elements:

- ▶ Consideration of equitable funding for governmental functions for a system of schools
- ▶ An implementation timeline that shall include a detailed list of tasks and benchmarks

2. The Unification Plan must be submitted to the School Board:

- ▶ The plan must be approved by the majority of the School Board

3. Following Plan Approval:

- ▶ The Unification Advisory Committee will meet at least quarterly until all schools transition to OPSB
- ▶ The Superintendent should prepare a quarterly unification progress report that will be shared with BESE, the local school board, The Recovery School District, LDE, and the education committees of the Senate and the House of Representatives

Appendix

Act 91 Triggers



Section of the Plan	How does the plan address this?
1. The local school board is not financially stable	<ul style="list-style-type: none"> • OPSB has outlined a plan to be financially sustainable and has built a budget within projected revenues post-unification (~\$20M) that delivers on all key organizational priorities • To assist with the transition to unification, a \$1.5M interim unification fund has been created to prepare for necessary investments
2. The local school board lacks a comprehensive expulsion and reentry program for students	<ul style="list-style-type: none"> • The student hearing office in EnrollNOLA, the Youth Opportunity Center, and the Youth Study Center are all involved in supporting reentry and expulsion; and the RSD currently operates the YOC and EnrollNOLA • The OPSB will guarantee these programs continue by setting up a process to see these programs shifted by July 1st, 2018
3. The local school board cannot assure the stability of employee retirement benefits	<ul style="list-style-type: none"> • Employees will retain their current retirement benefits; RSD employees will be able to remain in LASERS while OPSB will remain in TRSL; both of these funds are controlled by the state
4. The local school board cannot ensure or provide sufficient insurance coverage	<ul style="list-style-type: none"> • As RSD schools leave the state and rejoin the OPSB, there is concern that their insurance costs will increase • OPSB will outline minimum insurance coverage standards that all schools must meet to guarantee sufficient coverage and will examine billing models for schools • OPSB is also initiating a new process of letting insurance coverage go out to bid; as more schools join the OPSB, there is an opportunity to use the increased scale to minimize costs



Timeline and Responsibilities

Milestones proposed for December 2016

Portfolio Management

- ▶ Begin the process
- ▶ Consider formally engaging with school leaders on decision making

Citywide Services and Enrollment

- ▶ Clarify specific and more detailed transition plan for all aspects of EnrollNOLA

Facilities

- ▶ Plan for an assessment and life-cycle analysis of all school facilities to inform School Facility Preservation Program Planning
- ▶ Ensure that facilities lease policies are in place for schools coming over from the RSD

Finance and Operations

- ▶ Clarify Human Resources policies to allow for smooth transition of employees from RSD to OPSB, as appropriate

LEA Responsibilities

- ▶ Provide clear information to current OPSB schools about roles and responsibilities of LEA status, including the implications of becoming their own LEA

Other

- ▶ Convene the Citywide Vision and Strategic Goals Task Force

Timeline and Responsibilities

Milestones proposed for March 2017



Portfolio Management

- ▶ Develop a streamlined, common Charter Operating Agreement and ensure that all contract provisions are authorized and aligned with federal, state, and OPSB policies and laws
- ▶ Align on a variety of authorization standards between RSD and OPSB for new charter schools, including term length and benchmarking

Finance and Operations

- ▶ Develop a plan and mechanisms to ensure financial viability for both OPSB and RSD during the transition period leading to unification
- ▶ Establish policy and process for the ongoing management of differentiated funding and distribution of deferred revenues
- ▶ Ensure access to data necessary to monitor and oversee charter schools

LEA Responsibilities

- ▶ Provide updated information to schools on chargebacks for LEA services and supports

Timeline and Responsibilities

Milestones proposed for June 2017



Portfolio Management

- ▶ Ensure that facility and enrollment policies and processes are aligned with the portfolio management process in order to increase access to high-quality public school options for New Orleans families
- ▶ Develop a policy to establish the maximum percentage of seats that any single school operator (including OPSB, for its direct run schools) may occupy

Citywide Services and Enrollment

- ▶ Determine OPSB's role and responsibilities in helping schools to address the needs of students with special needs, including ELL students and students with disabilities
- ▶ Develop a plan for transition of Youth Opportunity Center

Facilities

- ▶ Establish clear maintenance and repair standards and accountability processes for all facilities within OPSB oversight
- ▶ Develop and implement standards and policies for capital repairs and replacements funded through the School Facility Preservation Program
- ▶ Refine existing policy around the sale and access to surplus or vacant buildings and ensure alignment with the portfolio management process
- ▶ Modify and improve the OPSB Facilities lease to clearly detail the role and responsibilities of OPSB and tenants

Timeline and Responsibilities

Milestones proposed for September 2017



Portfolio Management

- ▶ Develop a modified School Performance Framework and associated policies
- ▶ Update the school performance framework to incorporate the state's adjustment to the ESSA, and determine if any other changes are needed to ensure appropriate high standards for all schools and students (pending state approval of relevant policies)

Citywide Services and Enrollment

- ▶ Ensure the continued success of the Therapeutic Day Program by clarifying future status within the New Orleans community

Timeline and Responsibilities

Milestones proposed for December 2017



Portfolio Management

- ▶ Ensure that existing or potential future OPSB charter policies regarding student equity, emergency management, enrollment, and school authorization as outlined by Act 91 are integrated into the School Performance Framework, charter accountability process, and other relevant process documents

Citywide Services and Enrollment

- ▶ Identify which citywide services and resources will be funded within the expected revenues for the unified school district
- ▶ Determine the role of OPSB as a partner to non-profits that play critical roles in supporting citywide services

Facilities

- ▶ Develop policies and processes to secure property insurance that meet insuring standards for adequate coverage
- ▶ Plan for the development of the revolving facility loan fund and individual school facility accounts for implementation in 2020