

GREAT OAKS



CHARTER SCHOOLS

Great oaks, from little acorns grow

APPLICATION FOR MINOR MODIFICATION

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DE Department of Education
Charter School Office
401 Federal Street, Suite 2
Dover, DE 19901
infocso@doe.k12.de.us
Phone: (302) 735-4020
Fax: (302) 739-4483

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I. Introduction

Great Oaks Charter School seeks this minor modification of our charter to restructure our relationship with the Great Oaks Foundation to provide more direct services to better meet student needs. This modification is needed to provide the necessary staff to support our students' academic growth and achievement without compromising the school's financial position.

II. Table 2

Minor Modification (Section A Only)		Major Modification (Section A <u>AND</u> additional questions identified below)	
	Enrollment change (increase or decrease) between 5 and 15%		Performance Agreement Section A only
X	Change agreement with EMO/CMO		Enrollment change (increase or decrease) of greater than 15% Section B
	Start date (one-time) delay		Grade configuration (adding grade levels or reducing grade levels) Section C
	Name of charter school		Educational Program (i.e. curriculum) Section D
	Existing or planned school facilities or structures (including any plan to use temporary or modular structures)		Mission (includes At-Risk designation) Section E
	Change in terms to current site facility arrangement (i.e. lease to purchase)		Replace, remove, or add EMO/CMO, or transfer of authorizer Section F
	Educator Evaluation Process		Enrollment preferences Section G
	A change to the current authorized number of hours, either daily or annually, devoted to actual school sessions.		Location change Section H
	Other		Goals for student performance Section I

III. Section A Core Questions

- 1. What modification does the school's Board of Directors want to make to the term(s) of the charter? Identify the page number(s) on which the term(s) is/are stated in the currently approved charter. If the term(s) of the charter the school wants to modify is/are conditions placed on the charter by the Secretary of Education and members of the State Board of Education, state the condition(s) and the date(s) on which the condition(s) was/were placed on the school's charter.**

On December 31, 2019, Great Oaks applied for a minor modification to its

authorized enrollment. The December 2019 modification and this modification are both designed to better serve students while maintaining Great Oaks' financial viability.

After many thoughtful hours of analysis and conversation, the Great Oaks Board has determined it necessary to restructure its relationship with the Great Oaks Foundation (hereinafter "GOF"). Great Oaks' relationship with GOF is detailed in a management agreement which is referenced at page 5-52 of the charter and included at Attachment 18A of the original charter. Great Oaks relationship with GOF is twofold: 1) Great Oaks pays a management fee to GOF to provide educational management and operational services; 2) GOF provides tutors and tutor management services to Great Oaks. Through this agreement, GOF assumed responsibility for the management and operation of Great Oaks. In agreement with GOF, the Great Oaks board provided notice to GOF that as of May 31, 2020, Great Oaks would not renew the current management agreement but would seek to restructure the relationship. It is the intent of both parties that Great Oaks will locally manage and operate the school while continuing to engage GOF for the provision and management of the appropriate number of AmeriCorps tutors to serve the school's students and achieve its educational objectives.

2. What is the effective date of the proposed modification?

The effective date of the proposed modification is June 30, 2020. The school and the GOF have agreed to the terms of the separation of the management functions and are currently negotiating a new agreement for tutor recruitment and management.

3. The authorizer will review your most recent Performance Review Reports as part of your application. Discuss the school's academic performance, compliance with the terms of its charter, and financial viability as measured by the Performance Framework.

Academic Performance

Indicator	Points	Point Earned	Percent Point
Academic Achievement	100.00	19.00	19% Well Below Expectations
Academic Progress	125.00	59.00	47% Well Below Expectations
School Quality/Student Success	37.50	33.00	88% Meets Expectations
Graduation Rate	n/a	n/a	Not Applicable

Progress Toward English Language Proficiency	50.00	24.00	48% Well Below Expectations
Overall	312.50	135.00	43% Well Below Expectations

Although we are not yet where we wish to be with our student academic performance, we continue to adapt practices and innovate new ways of ensuring that students receive the supports they need. Further, we are continuing to see growth with some students, particularly those who begin with Great Oaks in the 6th grade.

Major Challenges

A significant challenge facing the school is the large number of students who arrive at Great Oaks significantly behind grade level and with significant needs. Approximately 80% of our students enter below grade level, with 40% arriving multiple grade levels behind. In addition, we serve a diverse population of students including a significant percentage of students with IEPs, students with Section 504 Plans, English Language Learners, immigrant, migrant and refugee students, students identified as gifted, students at risk of dropping out, and homeless students.

Great Oaks serves a high number of students impacted by trauma personally or by living in communities rife with violent crime and poverty. The number of students who come to us with 3 or more ACEs easily exceeds 50%.

As is becoming even more apparent during the school closure, many of our students struggle on the SBAC with computer literacy skills. The computerized NWEA MAP and Mastery Connect assessments are working to build computer literacy skills and the current online environment is certainly accelerating student progress.

Major Accomplishments

In the FY19 school year, students experienced significant gains in Math Proficiency, particularly in 6th grade. Only 9% of our incoming 6th Grade students arrived proficient in math. At the end of the year, 20% of this cohort of students reached proficiency. In 5 out of 6 areas math, we saw significant scale score growth. We similarly saw an increase in 8th grade ELA proficiency.

Ninth grade students demonstrated significant growth in their MAP scores from Fall to Spring in FY19, with most of the students growing over one grade level within the year.

Not satisfied with these results, we are making changes to better address student needs. In the coming year, we will seek to add additional student supports such

as a Reading Specialist, Behavioral Health Counselor, and a Social Worker. We will also seek to hire an additional special education teacher.

Organizational Performance

Year	Education Program				Governance & Reporting			Students & Staff		Facilities, Transportation, Health & Safety	OVERALL RATING
	Mission Fidelity	Applicable State & Federal Requirement	Students with Disabilities	English learners	Governance & Public Stewardship	Oversight of School Management	Reporting Requirements	Students Rights	Req on Teacher Certification & Hiring Staff		
	1a	1b	1c	1d	2a	2b	2c	3a	3b		
2018-2019	M	M	M	M	F	M	M	M	F	M	Far Below Standard

The school fell well below standard on the Organizational Framework in FY19. The school has already implemented board level processes that outline clear roles and responsibilities regarding board governance, oversight, and reporting to address the noted governance and reporting deficiencies. Some of these reporting processes faltered with the leadership transitions but have since been reinstated and will be properly transitioned to the new leadership team. In March 2020, the Board added three new board members to increase its capacity and expertise. See Appendix 1. In addition, the board will engage the Delaware Charter Schools Network to provide additional board governance training over the next 3 months.

We are also making progress toward 100% teacher certification. Prior to COVID19, we engaged the Delaware Charter Schools Network in creating plans for teachers to complete certification requirements and to support teacher observations. We will continue to engage the DCSN through FY21. Every teacher who is not currently certified, including those with emergency certifications, will have an individualized plan to become certified.

Although we anticipate challenges in hiring qualified math and science teachers in the current environment, we will seek to hire 100% certified teaching staff as we hire teachers for the 2020-21 school year.

Financial Performance

Financial Performance Framework Ratings	Near Term Indicators				Sustainability Indicators				Financial Management and Oversight	Overall Rating
	Current Ratio	Days Cash	Enrollment Variance	Default, Loan Covenants, & Debt Service Payments	Total Margin	Debt Asset Ratio	Cash Flow	Debt Service Coverage Ratio		
Year	1a	1b	1c	1d	2a	2b	2c	2d	3	
2018-2019	M	AS	AS	M	M	M	AS	N/R	M	Meets Standard

The school met standard on the Financial Performance Framework for the FY2019 school year. The school will work with an expert accountant to ensure proper internal controls and financial reporting processes are in place in response to the FY19 audit.

Although COVID-related expenses and other costs incurred this year have impacted the school's financial performance in the short-term, the school has implemented a number of strategies to strengthen the school's long-term financial health, including the reduction of the management fee paid to GOF (currently 8% of revenue in addition to costs of the tutors).

4. Describe the rationale for the request(s). Discuss any relevant research base or evidence that supports this type of request.

Great Oaks seeks this modification to provide the necessary supports to meet students' academic, social emotional and behavioral health needs and to improve Great Oaks' financial position.

In the past two school years, Great Oaks experienced a sharp increase in the number of students with IEPs and students with significant behavioral and social emotional health needs. Twenty-five (25%) of the currently enrolled students at Great Oaks have IEPs. Most of the students are impacted by trauma personally or by living in communities rife with violent crime. Seventy-four percent (74%) of our students are Medicaid eligible. Seventy percent (70%) live in the poorest zip codes in Wilmington. Thirty-four percent (34%) of our students come from the five poorest census tracts in the city. The number of students who come to us with 3 or more ACEs easily exceeds 50% with a significant number of adjudicated youths. The resulting social emotional, behavioral, and physical health needs are extraordinary.

The management services provided by GOF were not effective in addressing

these growing student needs and related challenges. The lesson from this year is that our staff need more support and our students need more direct student services and supports. Restructuring the relationship with GOF will give the school more control over the allocation of financial resources and the ability to provide supports where they are most needed.

- 5. Describe how the proposed modification will impact the operation of the school. Include how student achievement, staffing, facilities, and financial viability of the school may be impacted in the current school year and for the remainder of the school's charter term.**

Operations. *The proposed modification will result in a more effective and efficient use of resources, which will allow us to re-establish a positive school climate and culture and make faster academic gains. The management and financial functions will transfer from GOF to the school. We believe that this will result in greater efficiency at a much lower cost. As we have begun working more closely with the CEB and the DCSN, we are discovering that many of the areas of supported by GOF are available through the Department of Education or other supporting state agencies. Further, in many instances, we were duplicating efforts attempting to meet Delaware requirements as well as compliance requirements for GOF.*

Staffing: *We have restructured the leadership structure of the school to provide for site-based management of school operations and to be more responsive to student needs. This includes the elimination of some positions and the creation of three new positions. See Organizational Chart, Appendix 2.*

- 1. Executive Director.** *Leland R. Kent Sr. is the incoming executive director and current middle school Math teacher at Great Oaks. Mr. Kent left a rewarding 19-year career as Director of Victim Advocacy and Services to answer the call to teach. He began his career with the Philadelphia District Attorney's office in 1994 as the Victim-Witness Coordinator of the Homicide Unit. In 1999, Mr. Kent was promoted to the Assistant Director of Victim-Witness Services and was given oversight of the Witness Relocation Program. In April of 2011, Mr. Kent was elevated to serve as the Executive Director of Victim, Witness and Neighborhood Services. He earned his bachelor's degree in Criminal Justice from Mansfield University of Pennsylvania, a master's degree from Relay University's Graduate School of Education.*

- 2. Chief Operations Officer.** *The Chief Operations Officer is a critical member of the school's leadership team. The COO develops and maintains efficient systems and processes that allow teachers and academic support staff to focus solely on the success of students. The COO manages many crucial aspects of school administration, including budgeting, resource procurement, technology support, student recruitment, student data compilation, regulatory compliance, human resource administration, and academic operations support.*

After an extensive search, we have hired a COO who will be announced during the first week of June.

3. Director, School Climate and Culture. As our new Director of School Climate and Culture, Kendall Coleman will lead the school's efforts to develop a culturally responsive and trauma-invested school environment by building relationships with students and families, developing systems, and providing professional development to all staff.

Mr. Coleman's seven-year career in education has been devoted to supporting the social and emotional development of students. Prior to taking on the leadership role of Assistant Principal of School Climate with Mastery Charter Schools, Mr. Coleman served as Dean of Students in Grades 9-12 and a 9th Grade Social Emotional teacher. Most recently, Mr. Coleman was the Director of School Culture for Grades 6-8 with the Great Oaks Charter network.

Mr. Coleman's great passion is educating youth and preparing them for the future. Mr. Coleman himself grew up in the inner city of Philadelphia, where he experienced firsthand the integral role that educators play in the social and emotional development of the youth. Mr. Coleman remembers his 10th grade Spanish teacher and mentor as the first educator who provided him with a sense of social belonging and helped him to believe that he could be whoever he wanted to be. He daily aspires to give students a sense of social belonging and academic advancement.

Mr. Coleman earned a B.S. in Sociology with a minor in International Studies from Kutztown University. Understanding that no single approach is right for every individual, Mr. Coleman has been trained in a range of modalities including Social Theories on Child development and Youth Behaviors, Statics for Social and Behavior sciences, Juvenile Delinquency, and Ethnic Group Conflicts.

4. Director, Student Support Services. Currently the High School Special Education Coordinator, Kaitleen Gillis will take on additional responsibilities to serve as the newly created Director of Student Support Services. Ms. Gillis's primary focus will be to ensure student needs are being met. Ms. Gillis holds a B.A. in Secondary Education and English Literature from Emmanuel College in Boston, Massachusetts. Kaitleen graduated magna cum laude in May 2011. In June 2011, Kaitleen moved to Wilmington where she worked as an elementary school teacher in the RCCSD. During her time with the RCCSD, Ms. Gillis earned her M. Ed in Special Education from Wilmington University. She moved to Philadelphia in 2013 and taught special education in grades 6-12 at both charter and alternative schools for five years. During this time, Ms. Gillis was trained in assessment and instruction utilizing Fountas and Pinnell reading system.

In July 2018, Ms. Gillis returned to Wilmington as both an educator and resident. She worked as the Great Oaks Charter High School special education teacher for the 2018-2019 academic year and transitioned to the role of Special Education Coordinator in September 2019. Kaitleen is committed to social justice and equity for all students in the state of Delaware. Outside of school, Kaitleen volunteers time and resources to non-profits supporting progress in and around New Castle County.

5. *Middle School Principal.* *Although the Middle School Principal is not a new leadership position, we are excited to share that Samanta Lopez will be joining Great Oaks as the Middle School Principal. Samanta Lopez's professional trajectory of 10+ years in education, began in non-traditional spaces, such as in Urban community centers, teaching English as a second language to community members. In 2002, Ms. Lopez transitioned to higher education bridging learning experiences through student and academic affairs as an adjunct professor. Ms. Lopez also served as the director of a grant-based mentoring program for ASPIRA of Delaware that allowed her to reach at-risk youth, who often "go by the wayside," and she helped create a pathway of possibilities that promoted education and leadership through mentoring and community partnerships. Ms. Lopez currently teaches World Language at Howard High School and is a Delaware Teacher Institute Fellow designing, developing, and delivering curriculum specific to higher order thinking in language development. Ms. Lopez holds a Bachelor of Science in Community Health, master's degree in public administration, master's degree in Education, and is finishing her doctorate in Sociocultural Approaches in Education.*

Financial Viability. *This modification, designed to provide more direct services to students, will strengthen the school's financial viability as well as positively impact student achievement. See Response to Question 6. In addition to building a strong and experienced leadership team, the school plans to engage Community Training and Assistance Center (CTAC) to work with the leadership team as they create and implement a comprehensive school improvement plan. The school will also have the integrated support of many other partners, including Geoff Langdon, Karen Thorpe, the Community Education Building, and the Delaware Charter Schools Network.*

- 6. Indicate the projected impact, if any, of the proposed modification on the school's present financial position, and its financial position going forward. If the modification promises to create financial challenges, indicate how those will be remedied.**

The modification will improve Great Oaks' financial position by replacing a large management fee for unsatisfactory services with the ability to better meet student needs. Adding specific staff to address the challenges faced this year will return Great Oaks to its strong beginning. This in turn will once again create student demand for Great Oaks and support the school's long-term financial viability.

Management Fee = \$515,000	NEW PLAN
<i>Management and Operations Services</i> <ul style="list-style-type: none"> • <i>Coaching & Curricular Support</i> • <i>Financial Assistance</i> • <i>Grant Assistance</i> • <i>Leadership Coaching</i> • <i>Human Resources</i> • <i>Google Platform (email, etc)</i> • <i>Google Classroom for virtual learning</i> 	<i>Coaching & Curricular Support</i> CEB DOE DCSN Current Master Teachers Retired School Leaders <hr/> <i>Financial Management: COO</i> Grants: COO Leadership coaching: CTAC HR: COO, Karen Thorpe Email: transfer to GO and explore Office 365 Learning Platform: continue w/Google Classroom through crisis; implement Schoology
Tutor Recruitment & Management = \$430,000	Continue with GOF – to be negotiated
<i>Recruit and manage tutors</i>	<i>Recruit and manage tutors</i>
Direct Student Supports	Direct Student Supports
NONE	Social Worker Behavioral Health Reading Specialist

Over the past two months we have begun several measures to strengthen the school's financial health. We will continue with these processes through the FY2021.

- *Comprehensive review, and if necessary, renegotiation of all contracts*
- *Review all FY2020 expenditures*
- *Redesign master schedule for more efficient staffing*
- *Implement internal spending policies*
- *Engage the DCSN for support with 21st Century and Consolidated Grants*

In addition to these efforts, we have launched an aggressive 5 Step Recruiting Plan to meet our proposed authorized enrollment. See Appendix 3.

While we are investing time and resources to meet our authorized enrollment, we must acknowledge that COVID19 has grossly impacted our 6th grade recruiting efforts. Considering this, we are financially and operationally prepared to operate at 80% of our proposed authorized enrollment. See FY21 Projected Budget, Appendix 4.

Great Oaks Minor Modification Appendix 1

Kelly E. Firment

Ms. Firment joined Bank of America in 1988. She currently serves as the Small Business Credit Card Product/Strategy Executive. She is responsible for managing the Small Business Credit Card suite of products, driving the value propositions, short- and long-term strategies, product features and marketing strategies as well as developing new products and enhancements to meet market and customer needs. Prior to assuming this role Ms. Firment was the Retail Banking and Distribution Initiative Execution Executive at Bank of America. She was responsible for the oversight and delivery of initiatives within the RB&D portfolio, as well as, partnering closely with the Core, Emerging, and High Opportunity sub-segments to innovate and drive new initiatives to deliver opportunities for Bank of America customers, clients and employees. Ms. Firment currently serves as Chairman of the Board for the Delaware Community Foundation. She is a graduate of the University of Delaware with a degree in Business and Technical Writing.

Stephanie Toronto

Ms. Toronto is a Program Director with Springboard Collaborative, a non-profit based out of Philadelphia. In this role, Stephanie works with schools and districts around the country supporting out-of-school literacy and family engagement programming. Stephanie started her 10-year career in education at East Side Charter School as a Special Education teacher. She then worked at Mastery Charter Schools in Philadelphia before joining the team at Great Oaks as the Director of Student Support Services. Prior to teaching, Stephanie was a campaign staffer with the Delaware Democratic Party and spent most of her time working for Governor John Carney during his first congressional campaign. Stephanie earned a B.A. in English Literature from the University of Delaware and a master's degree from Wilmington University in Special Education. Ms. Toronto remains dedicated to the success of Great Oaks Charter School and looks forward to contributing to its continued success.

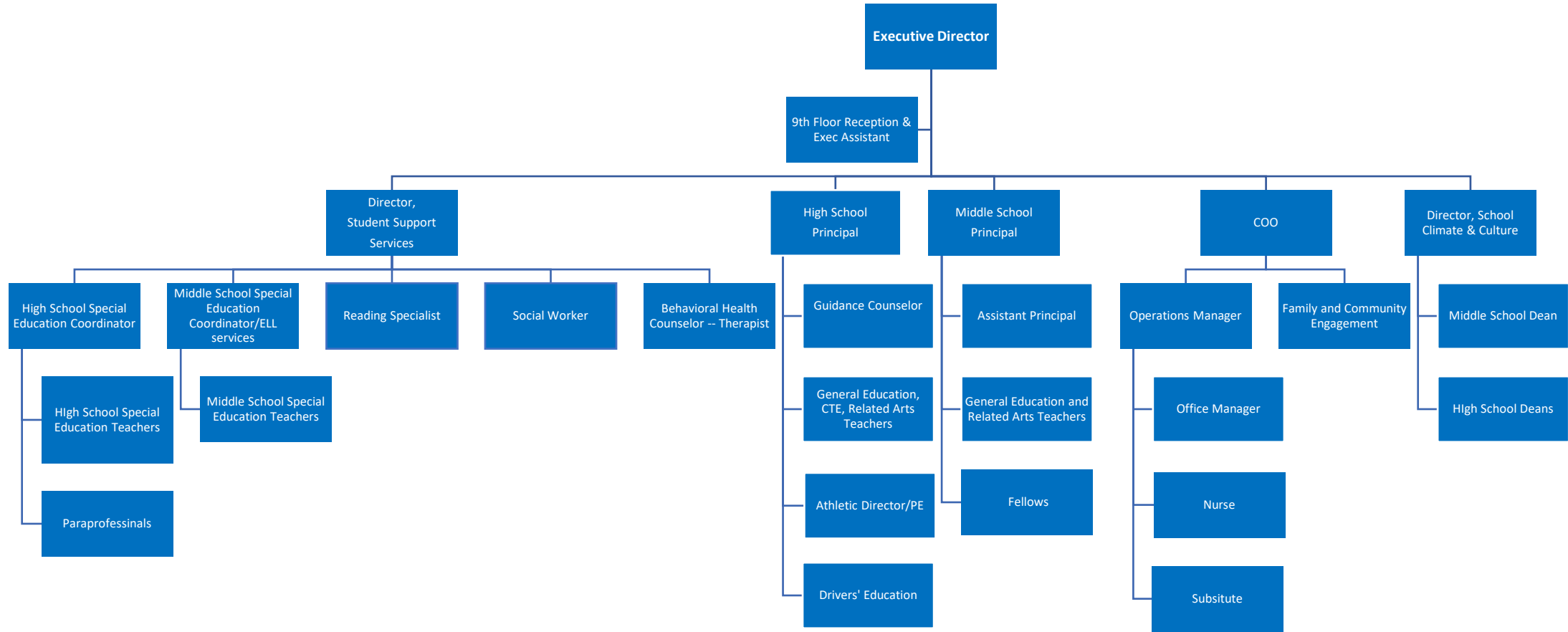
Keria Broadnax

Ms. Broadnax is a wife and mother of 2 children; Jaylin Broadnax is a 10th grade student at Great Oaks. Ms. Broadnax has 20+ years of legal insurance experience and currently works for Farmers Insurance Group as a Regulatory Specialist. She loves to volunteer at the Food Bank of Delaware, Ronald McDonald House, and Toys for Tots to name a few. She also enjoys cooking and is about to tackle gardening. She has been a member of the Great Oaks family from its inception. Ms. Broadnax sees the expectations that the school and teachers have for Jaylin, convincing her that the staff have her best interests at heart. Jaylin is thriving

academically, personally, and socially and loves being involved in dancing and especially Theatre.

Ms. Broadnax looks forward to being a part of the infrastructure that will prepare Great Oaks students to be the first and best graduating class of Great Oaks Wilmington.

**Great Oaks Minor Modification
Appendix 2**



5 Step Targeted Recruiting Plan

Marketing: An aggressive marketing campaign is underway to target families through social media engagement, multiple targeted mailing campaigns, and strategically placed billboards/banners (example: banner in local mall). We are also hosting weekly virtual open houses and tours.

Family and Student Engagement and Retention: Staff members are calling every family enrolled at Great Oaks to share plans for next year, engage parents, and receive feedback.

Community Engagement: Great Oaks is partnering with Game Changers (Dubard McGriff) to implement a targeted community engagement strategy. The goal is to reestablish the Great Oaks name in the community and encourage families to enroll at Great Oaks.

Virtual Open House Events: With the quarantine still in place we began hosting weekly virtual open house events.

Community Listening Tour: Great Oaks leadership team and board members are meeting with community leaders (elected officials, non-profit leaders, and corporate executives) to re-establish connection and share the vision for Great Oaks moving forward.

**Great Oaks Charter School
Appendix 4**

Students	415	520
Tutors	14	22
% of Authorized Enrollment	80%	100%

REVENUE

State and Local	5,206,999	6,770,425
Grants	1,668,166	1,668,166
Private Contributions	200,000	200,000
Other	34,000	34,000
Total Revenue	7,109,165	8,672,591

EXPENSES

Salaries	2,899,220	3,634,090
Stipends	115,000	115,000
OEC's	1,322,379	1,644,776
Lease	1,085,345	1,085,345
Transportation	410,000	621,137
Tutor Housing	79,815	106,416
Tutor Recruitment	122,010	174,300
Subcontracted Education	383,807	483,807
Instructional Supplies	115,754	140,754
Office Supplies	30,000	35,000
Equipment Rental	66,204	66,204
Student Activities	56,766	66,766
Auto Purchase	30,000	30,000
Auto Costs	15,000	15,000
Insurance	57,995	62,995
Special Placements	22,500	47,500
Travel	5,000	5,000
Legal Services	25,000	26,800
Association Dues	22,800	25,000
Computer Services	25,000	30,000
Telephone	13,560	14,560
Advertising	15,000	15,000
Repairs and Maintenance	12,500	12,500
Professional Development	25,000	30,000
Miscellaneous	15,000	15,000
Total Expenses	6,970,656	8,502,949

less contingency	138,183	169,452
INCOME (DEFICIT)	326	190

Great Oaks Charter School

Appendix 4

415 STUDENTS		520 STUDENTS	
POSITION	NO.	POSITION	NO.
Executive Director	1	Executive Director	1
Chief Operations Officer	1	Chief Operations Officer	1
Director School Climate	1	Director School Climate	1
High School Principal	1	High School Principal	1
Middle School Principal	1	Middle School Principal	1
Director, Student Support Services	1	Director, Student Support Services	1
Assistant Middle School Principal	1	Assistant Middle School Principal	1
Middle School Special Education Coordinator	1	Middle School Special Education Coordinator	1
Family Engagement Coordinator	1	Family Engagement Coordinator	1
Special Education Teachers	5	Special Education Teachers	6
Middle School Teachers	13	Middle School Teachers	16
High School Teachers	14	High School Teachers	19
Reading Specialist	1	Reading Specialist	2
Behavioral Health Counselor	1	Behavioral Health Counselor	2
Social Worker	0	Social Worker	1
Guidance Counselor	1	Guidance Counselor	1
Deans	3	Deans	4
Operations Manager	1	Operations Manager	1
Office Manager	1	Office Manager	1
9th Floor Administrative Assistant	1	9th Floor Administrative Assistant	2
Nurse	0	Nurse	0
Substitute	1	Substitute	1
Paraprofessionals	2	Paraprofessionals	2
TOTAL FTEs	53	TOTAL FTEs	67