



2016-2017 ANNUAL REVIEW

CAREER ACADEMY SOUTH BEND MIDDLE SCHOOL

Evaluated By:

Lindsay Omlor, Director of Charter Schools and
Emily Kleinschmidt, Assistant Director of Accountability

Education One, L.L.C.

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OVERVIEW

In order to ensure our schools are operating at the highest level possible, Education One conducts an Annual Review of each of its schools, specifically assessing the school's Academic, Finance and Governance capabilities. The Annual Review report is a compilation of three key components:

- 1) Document Review
- 2) Routine Site Visits
- 3) Survey Analysis

Evidence of these items is collected throughout the school year and indicators are reported to the school's Board of Directors in routine monthly meetings. Through continuous monitoring, Education One is able to identify trends in data overtime, and address key areas of concern/highlight key areas of success on a more frequent basis. While this process involves a significant time commitment, Education One believes that this high level of accountability, coupled with strong collaboration, will allow our schools to best meet the needs of the student populations they serve.

Annual Review reports are presented to key stakeholders, including but not limited to: the School Board Chair, School Leader, and EMO/Superintendent (*if applicable*). A final copy of each school's Annual Review report can be found on our website: www.education1.org

PART I: Academic Performance

The Annual Academic Performance Review gauges the academic success of schools in serving their target populations and closing the achievement gap. Part I of this review consists of eight indicators designed to measure how well a school's student population performs and grows on state standardized tests, attendance, and school-specific measures. All Sub-Indicators are noted in the school's Accountability Plan Performance Rubric.

Overall Rating	Year 1	Year 2	Year 3	Year 4	Year 5
	2015-16	2016-17	2017-18	2018-19	2019-20
	Does Not Meet Standard	Approaching Standard			

Is the school's educational program successful?		
Performance Targets	Does not meet standard	The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues; or the school requires an Improvement Plan
	Approaching standard	The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues
	Meets standard	The school complies with and presents no concerns in the sub-indicators below
	Exceeds standard	The school consistently and effectively complies with and presents no concerns in the sub-indicators below

Sub-Indicator Ratings	Sub-indicators	Rating
	ISTEP+ Participation Rate	MS
	Attendance Rate	MS
	IDOE Accountability Grade	MS
	Legacy Data	DNMS
	Indiana Growth Model	DNMS
	Value Added (NWEA)	ES
	Instruction	AS
	Comparison to Surrounding Schools	AS

ISTEP+ Participation Rate: ISTEP+ Participation rate calculations are used for state and federal reporting and accountability determinations. Education One requires an ISTEP+ participation rate of at least 95% in order to meet standard. Career Academy South Bend Middle School (CASB-MS) had an average participation rate of 98.4% for the 2016-17 school year, and thus, **Meets Standard** according to their Accountability Plan Performance Rubric.

Attendance Rate: Starting at the age of 7, students in Indiana are required to attend school regularly. Habitual truancy is defined by the Indiana Department of Education as 10 or more days absent from school, meaning students are required to attend school for 95% of the 180 days in the school year.

Career Academy South Bend Middle School has an aggregate attendance rate of 96.2%. The majority of grade levels are above the 95% standard, with one grade level relatively close to achieving this metric. CASB-MS receives **Meets Standard** according to their Accountability Plan Performance Rubric.

Grade Level Attendance Breakdown		
5 th Grade	98%	✓
6 th Grade	97.3%	✓
7 th Grade	94.7%	✗
8 th Grade	95.1%	✓
Overall Average	96.2%	✓

IDOE Accountability Grade: In Spring 2016, 38.6% of CASB-MS students passed the English/Language Arts portion of ISTEP+, while 19.9% of students passed the Mathematics portion.

In English/Language Arts, the school earned 85.3 points for Top 75% growth and 76.3 points for Bottom 25% growth, giving them 80.8 points for Overall Growth. In Mathematics, the school earned 68.9 points for Top 75% growth and 71.8 points for Bottom 25% growth, giving them 70.4 points for Overall Growth.

The Indiana State Board of Education (SBOE) awarded CASB-MS with a 'C' for its 2015-16 school year performance. Thus, the school **Meets Standard** according to their Accountability Plan Performance Rubric.

A new, student-centered accountability system was implemented to calculate the letter grade given to each school. The framework includes three domains: performance, growth, and multiple measures. Each domain has its own indicators that make up the domains final score. The final scores are weighted accordingly to determine the final performance and growth category. For more information, including the history of Indiana's Student-Centered Accountability from the Indiana Department of Education, visit:

<http://www.doe.in.gov/accountability/indiana-student-centered-accountability>

Legacy Data: When calculating Legacy Data, Education One looks at students who have been enrolled in the school for two or more years and whether or not they are proficient in English/Language Arts and Mathematics according to ISTEP+. CASB-MS had a total of 299 legacy students, with only 82 or 27.4% proficient in English/Language Arts and 138 or 46.1% in Mathematics. Therefore the school receives a rating of **Does Not Meet Standard** on their Accountability Plan Performance Rubric.

Indiana Growth Model: Under the Indiana Growth Model, the IDOE compares each student's growth on ISTEP+ for one year to the next and determines whether the student made low, typical, or high growth compared to their academic peers. For more information on how growth is determined, visit: <http://www.doe.in.gov/accountability/growth>.

Education One measures the median percentile rank of students achieving growth in both English/Language Arts and Mathematics to ensure that students are making substantial and adequate gains over time. In 2015-16, 38% of CASB-MS students outgrew their peers at the same achievement level in English/Language Arts and 32% of

CASB-MS students outgrew their peers at the same achievement level in Mathematics. Overall, the school had an average median percentile growth of 35%, which earns them a rating of **Does Not Meet Standard** on their Accountability Plan Performance Rubric.

Value Added: Education One requires all of the schools in its portfolio to measure student progress multiple times through the school year, using a tool selected by each individual school. CASB-MS utilizes Northwest Evaluation Association (NWEA) to effectively measure student achievement at the beginning, middle, and end of the school year.

The charts below indicates the average performance in each grade level at CASB-MS, in comparison to the mean grade level norms, set by NWEA. While NWEA does measure student growth using a range which includes the standard deviation to account for dispersion, the norms in the tables below have a very straightforward interpretation. The columns marked “Grade Level Norms” are indicative of the “End of the Year” mean score in each grade level. The columns marked “Met Growth Target” indicate the expected rate of academic growth and whether or not grade level growth norms were met for the year.

NWEA Fall to Spring Comparison - Reading					
Grade Level	Mean RIT Score Fall	Mean RIT Score Spring	Fall to Spring Growth Target	Grade Level Norms	Met Growth Target
5 th Grade	198.8	211.5	6.1	211.8	✓
6 th Grade	204.5	213.5	4.8	215.8	✓
7 th Grade	209.0	214.9	3.7	218.2	✓
8 th Grade	216.2	222.5	2.8	220.1	✓

NWEA Fall to Spring Comparison – Math					
Grade Level	Mean RIT Score Fall	Mean RIT Score Spring	Fall to Spring Growth Target	Grade Level Norms	Met Growth Target
5 th Grade	204.4	220.1	9.9	221.4	✓
6 th Grade	209.8	220.5	7.7	225.3	✓
7 th Grade	211.9	222.6	6.0	228.6	✓
8 th Grade	222.0	230.4	4.6	230.9	✓

NWEA Fall to Spring Comparison – Language Usage					
Grade Level	Mean RIT Score Fall	Mean RIT Score Spring	Fall to Spring Growth Target	Grade Level Norms	Met Growth Target
5 th Grade	198.8	206.2	5.8	211.5	✓
6 th Grade	206.6	213.1	4.5	215.3	✓
7 th Grade	206.5	215.1	3.6	217.6	✓
8 th Grade	215.8	220.8	2.9	219.0	✓

On average, CASB-MS met the Grade Level Growth Norms in twelve of the twelve categories assessed, or 100%, according to NWEA. Therefore, the school **Exceeds Standard** according to their Accountability Plan Performance Rubric.

For more information on NWEA, visit their website at: <https://www.nwea.org/>

Instruction: High quality curriculum, coupled with highly effective teachers, ensure a student's academic success. Therefore, Education One evaluates each of the schools in our portfolio to measure the quality of the school's instructional practices. Does the school effectively implement its curriculum? Focus instruction on core learning objectives? Appropriately pace lessons to ensure high levels of rigor and challenge? Implement a variety of differentiated strategies to engage a wide range of student interests, abilities and learning needs? Provide students with timely feedback in order to help them improve their instructional practices? These items are measured through monthly school site visits, which include classroom walk-throughs and observations.

Based on the qualitative evidence collected throughout the 2016-17 school year, Career Academy South Bend Middle School receives a rating of **Approaching Standard** according to their Accountability Plan Performance Rubric.

Comparison to Surrounding Schools: CASB-MS out performed in either proficiency or growth compared to surrounding schools half the time. Education One measures whether or not each of its schools outpace the schools that students would have been assigned to in terms of both proficiency and growth. Therefore, CASB-MS is **Approaching Standard** according to their Accountability Plan Performance Rubric.

PART II: Financial Review

The Annual Financial Review gauges both short term financial health as well as long term financial sustainability, while accounting for key financial reporting requirements. Part II of this review consists of seven indicators designed to measure the overall financial viability of a school. All Sub-Indicators are noted in the school's Accountability Plan Performance Rubric.

Overall Rating	Year 1	Year 2	Year 3	Year 4	Year 5
	2015-16	2016-17	2017-18	2018-19	2019-20
	Meets Standard	Meets Standard			

Is the organization in sound fiscal health?	
Performance Targets	Does not meet standard The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues
	Approaching standard The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues
	Meets standard The school complies with and presents no concerns in the sub-indicators below
	Exceeds standard The school consistently and effectively complies with and presents no concerns in the sub-indicators below

Sub-Indicator Ratings	Sub-indicators	Rating
	Financial Management	DNMS
	Enrollment Variance	MS
	Current Ratio	MS
	Days Cash	MS
	Debt Default/Delinquency	MS
	Debt to Asset Ratio	MS
	Debt Service Coverage	MS

Financial Management: At the time of this report, Career Academy Middle School has not submitted a copy of the school's completed audit for Fiscal Year 2015/2016. Without this document, Education One is unable to determine whether CASB-MS shows any significant deficiencies or material weaknesses with the school's financial controls. Therefore, the school **does not meet standard** in this area.

The school also **does not meet standard** in regards to its financial reporting requirements for timely submission of quarterly financial statements. No quarterly financials for CASB-MS were submitted to Education One until May 2017 for the 2016-17 school year.

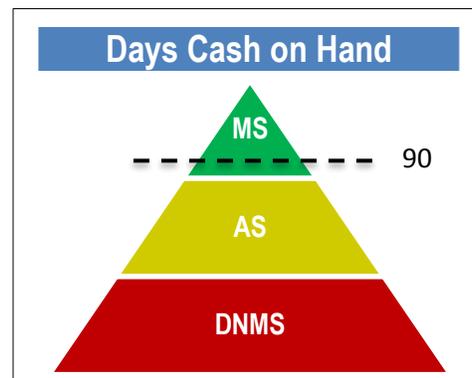
For these reasons, the school receives a rating of **Does Not Meet Standard** for the 2016-17 school year.

Enrollment Variance: Indiana calculates its state tuition support for schools two times per year. According to the Indiana Department of Education, CASB-MS had an enrollment count of 406 students as of September 2016 and an enrollment count of 404 students as of February 2017. This sub-indicator is calculated by averaging the number of students enrolled in the school on the February 2017 Count Day with the number of students enrolled at the time of the September 2016 Count Day. Therefore, the school had an average annual enrollment of 405 for the 2016-17 school year.

As a whole, CASB-Network had an average enrollment of 1,149.5 students enrolled throughout the school year, with a budgeted enrollment of 1,147. This equates to a positive enrollment variance of 100.2%. Therefore, CASB-Network receives a rating of **Meets Standard** for this indicator.

Current Ratio: With regard to its current ratio, the school's Board Chair, Lawrence Garatoni, submitted a written statement of assurance to Education One on August 11, 2015 that guarantees funds will be provided to cover any capital expenditures or operating deficits of the school through June 30, 2022. This commitment is binding for the Garatoni-Smith Family Foundation both during and after the tenure of Lawrence Garatoni as Board Chair. Based on this, the school's current assets (cash or other assets that can be accessed in the next 12 months) exceed its current liabilities (debt obligations due in the next 12 months) with a ratio of 1.10 or greater and, therefore, the school **Meets Standard** according to their Accountability Plan Performance Rubric.

Days Cash: Additionally, Education One also calculates days cash on hand as an important measure of a charter school's fiscal health. This metric indicates how many more days after June 30, 2016, the school would be able to operate. Noting the aforementioned written statement of assurance submitted by Lawrence Garatoni, Board Chair, CASB-MS receives a rating of **Meets Standard** according to their Accountability Plan Performance Rubric.



Debt Default/Delinquency: This metric is determined by both the auditors' comments in the audited financial statements and contact with the school's creditors. In the case of Career Academy South Bend Middle School, neither its auditors nor its creditors provided any indication that the school had defaulted on its debt obligations. Based on the summary of these sub-indicator ratings, CASB-MS receives a rating of **Meets Standard** according to their Accountability Plan Performance Rubric.

Debt to Asset Ratio: The school **Meets Standard** for the debt to asset ratio sub-indicator, due to the aforementioned written statement of assurance, indicating the school's debt to asset ratio would be less than 9.0.

Debt Service Coverage: Lastly, the school **Meets Standard** for debt service coverage, based on the aforementioned written statement of assurance, which notes that the school has adequate net income to support its debt service through June 30, 2022.

PART III: Board Governance and Leadership

The Annual Governance and Leadership Review gauges the academic and operational leadership of schools. Part III of this review consists of three indicators designed to measure how well school administration and the school's Board of Directors comply with the terms of their charter agreement, applicable laws, and authorizer expectations. All Sub-Indicators are noted in the school's Accountability Plan Performance Rubric.

Overall Rating	Year 1	Year 2	Year 3	Year 4	Year 5
	2015-16	2016-17	2017-18	2018-19	2019-20
	Approaching Standard	Meets Standard			

Is the organization effective and well-run?	
Performance Targets	Does not meet standard The school board/leadership team present concerns in a majority of the sub- indicators with no evidence of a credible plan to address the issues
	Approaching standard The school board/leadership team present concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues
	Meets standard The school board/leadership team comply with and present no concerns in the sub-indicators below
	Exceeds standard The school board/leadership team consistently and effectively comply with and present no concerns in the sub-indicators below

Sub-Indicator Ratings	Sub-indicators		Rating
	Academic Leader Review		MS
	Governance		AS
	Charter Accountability Reporting Requirements		MS

Academic Leader Review: Career Academy South Bend Middle School is a part of the Career Academy South Bend Network (CASB-Network), which oversees three schools in South Bend. During the 2016-17 school year, the network delegated daily oversight obligations to Alex Hammel, Superintendent for all three schools, as well as to two School Leaders. The Superintendent, along with the School Leaders and supporting staff, support each of the three schools in areas such as curriculum and instruction, professional development, reporting, financial management, human resources, and technology. Members of the network leadership team all demonstrate sufficient academic and operational expertise.

During the 2016-17 school year, Lydia Jagger served as the School Leader of CASB-MS. As School Leader, she was primarily responsible for academic and instructional development, state and authorizer reporting requirements, special education oversight and student discipline, with Dean Fecher overseeing fifth and sixth grade. Both Ms. Jagger and Mr. Fecher have experience teaching and leading within and outside the network, and have demonstrated strong academic leadership capabilities.

Their collaborative leadership approach improved in comparison to the 2015-16 school year, and included increased communication, walkthroughs, and staff development for grades five and six, which are located in the elementary school building. Ms. Jagger worked to ensure that all middle school teachers received similar professional development and training at the beginning and throughout the school year to establish the middle school as its own entity. Mr. Fecher also made efforts to increase walkthrough presence and to support the middle school grade levels housed in the elementary school. The two leaders consistently met throughout the year to ensure best practices were implemented across grades 5-8.

During the 2016-17 school year, both Ms. Jagger and Mr. Fecher were required to submit additional materials outside of the middle school's Accountability Plan Performance Rubric and meet consistently with the Assistant Director of Accountability on a weekly and then bi-weekly basis. Both leaders were compliant with the middle school's improvement plan and collaborated effectively during the meetings with Education One. Progress toward goals in various classrooms were noted and evidenced in subsequent visits throughout the school year. Noted improvements included teacher-leader collaboration, implementation of best practices, data-based decision making, and classroom management.

During the 2016-17 school year, both Ms. Jagger and Mr. Fecher have been consistent in providing information to and consulting with the schools' board of directors, Education One, and other key stakeholders. They attend all CASB-Network board meetings, as well as various weekly and/or monthly meetings with the Education One team. During these meetings, they provide detailed updates pertaining to student performance, student recruitment and retention, school initiatives and major events.

Overall, CASB-MS receives a rating of **Meets Standard** for school leadership.

Governance: The Board of Directors for CASB-Network is active, experienced, and provides competent oversight for the three schools, with a clear understanding of the mission and vision of the network. The board holds all of its meetings in compliance with Indiana's Open Door Law and adheres to the policies and procedures set forth in the by-laws and its charter.

The CASB-Network board is currently comprised of 9 members. The board recruits and selects members that are knowledgeable, including individuals with experience in finance, education, community engagement and business. These board members represent diverse skill sets, and act in the best interest of the school; demonstrating a clear understanding of and commitment to the mission of CASB-Network, to provide all students – regardless of past academic performance – with a rigorous education that prepares them for college and/or

careers. However, the board lacks an individual with legal expertise, and could benefit from growing in this area.

During the 2016-17 school year, the board was very active in the community and worked to secure financial resources as well as additional community partnerships to support expansion and the implementation of mission-aligned programs. The board also demonstrated effective interactions with the Superintendent, who was replaced in the 2016-17 school year, and both School Leaders that allowed for the success of the schools; including requesting and disseminating information in a timely manner, providing continuous and constructive feedback, engaging the school leader in school improvement plans and establishing clear objectives, priorities, and goals.

Regarding governance operations, board meetings were scheduled monthly, however, meetings were routinely cancelled or changed with little to no notice. From July 2016 to June 2017, the board had 12 opportunities to meet, but met only 7 times or 58%. However, when regularly scheduled board meetings did take place, the CASB-Network board typically met quorum, and maintained high levels of attendance, with very few directors absent at each meeting. Board meeting minutes were provided to Education One in a timely manner and included all necessary information as per Indiana's Open Door Law.

The Board Chair for the CASB-Network maintained consistent and transparent communication with Education One, leading to a positive and collaborative relationship between the two entities. However, often times decisions related to the school were made by the Board Chair without board consent. Therefore, the majority of board meetings throughout the year seemed to serve as informational sessions, rather than true governance sessions. Furthermore, multiple deadlines related to school financials, School Leader evaluations, etc. were not met during the school year, making it difficult to effectively evaluate the network in real time.

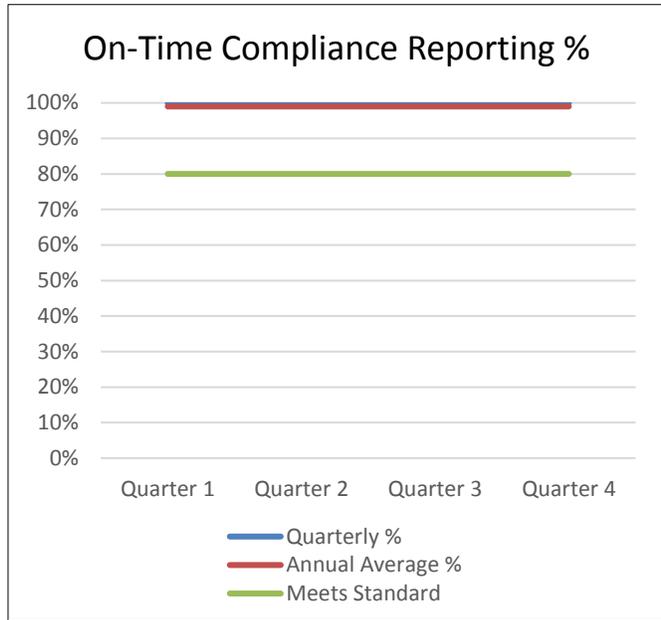
It is also worth noting that the CASB-Network board has yet to develop a system for assessing its own performance throughout the year, preventing the board from objectively measuring its directors as well as its effectiveness at the close of each school year.

The CASB-Network board has created a positive and collaborative working relationship with the network leadership team, and with Education One. However, due to the need for improved communication, the lack of a formalized self-evaluation tool for the board, regular adjustments to the board meeting schedule and need for additional board development, the Career Academy South Bend Network board receives a rating of **Approaching Standard** according to their Accountability Plan Performance Rubric.



Charter Accountability Reporting Requirements:

During the 2016-17 school year, CASB-MS School Leader, Ms. Jagger, was primarily responsible for submitting compliance documents to Education One. Documents such as employee spreadsheets, board meeting minutes, academic data, and quarterly reports were routinely submitted on-time. State reporting documents were submitted in accordance with state law. CASB-MS maintained compliance with all material sections of its charter and submitted amendments as applicable. Ms. Jagger was consistently actively engaged in meetings with Education One and maintained sufficient communication with Education One between scheduled meetings. Thus, CASB-MS receives a rating of **Meets Standard** for compliance obligations.



PART IV: School Climate

The Annual School Climate Review gauges the culture of schools in meeting the needs of students, staff, and parents in order to ensure overall effectiveness. Part IV of this review consists of two indicators designed to measure how well a school is providing the appropriate conditions for stakeholder success. All Sub-Indicators are noted in the school's Accountability Plan Performance Rubric.

Overall Rating	Year 1	Year 2	Year 3	Year 4	Year 5
	2015-16	2016-17	2017-18	2018-19	2019-20
	Does Not Meet Standard	Meets Standard			

Is the school providing appropriate conditions for student and staff success?

Is the school providing appropriate conditions for student and staff success?		
Performance Targets	Does not meet standard	The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues
	Approaching standard	The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues
	Meets standard	The school complies with and presents no concerns in the sub-indicators below
	Exceeds standard	The school consistently and effectively complies with and presents no concerns in the sub-indicators below

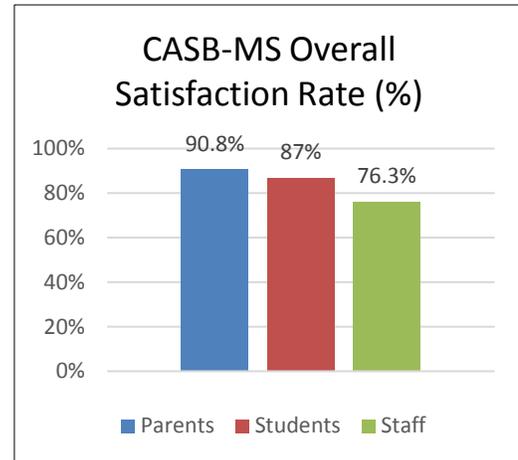
Sub-Indicator Ratings	Sub-indicators		Rating
	School-wide Satisfaction		MS
	Survey Participation		N/A

School-wide Satisfaction: In order to gauge school-wide satisfaction amongst stakeholders, including parents, students and staff, Education One requires all of the schools in its portfolio to administer an annual survey, created and analyzed by a third party provider. The survey measures overall satisfaction with the school, effectiveness of communication, safety of the school environment and student/staff/parent interactions.

The results of the third party survey, conducted during spring 2017, were generally positive. While a survey for CASB-MS was not individually conducted, an average of the SASB and CASB-HS results show that CASB-MS was **meeting standard** regarding communication with parents and students, with 90.8% of parents and 87% of students reporting overall satisfaction with the school.

The survey results showed that 76.3% of staff reported feeling a sense of job satisfaction, which was **approaching standard**.

Overall, CASB-MS receives a rating of **Meets Standard** according to their Accountability Plan Performance Rubric.



Survey Participation: While survey participation is not a metric that is calculated in the Accountability Plan Performance Rubric, understanding the survey's population size as well as sample size is valuable in determining the validity of the overall survey. A school's population size is the total number of people in the group you are trying to reach with your survey. The sample size is the number of completed responses the survey receives. Unfortunately, survey results for grades 5-8 were not available for CASB-MS for the 2016-17 school year, as 5th-6th grade results were compiled with the results of Success Academy South Bend and 7th-8th grade results were included in Career Academy South Bend High School's results.

CASB-MS Survey Participation			
Stakeholder Group	Population Size Total # of Possible Respondents	Sample Size # of Respondents	% of Survey Participation
Parents*	N/A	N/A	N/A
Students**	N/A	N/A	N/A
Staff	N/A	N/A	N/A

Education One would like to see an individual CASB-MS survey conducted in the next school year. The school receives a rating of **Not Applicable** for this sub-indicator.

PART V: Next Steps

Does the school or organization require interventions moving forward?

Overall, Career Academy South Bend Middle School made positive gains towards the improvement of processes, procedures, and instructional practices during the 2016-17 school year. There was noted improvement in the established collaborative leadership method. However, Education One looks forward to the 2017-18 school year where middle school grades will be housed in the same building with only one school leader overseeing daily operations and instructional practices.

At this time, no significant recommendations for school improvement are required, however, considerations for improvement in the following areas should be noted in the coming school year to ensure continued progress:

- Continued board development, including the addition of further highly qualified members to the board; the implementation of board self-assessment procedures; strengthened communication between the board and Education One; and maintaining a consistent and regularly scheduled board meeting calendar
- Improved processes and procedures to strengthen Special Education services, including clear and concise communication of services to families
- Continued development of staff and implementation of instructional best practices as it relates to rigor, differentiation, and problem based learning methods