



2017-2018 ANNUAL REVIEW

CAREER ACADEMY SOUTH BEND-MIDDLE SCHOOL

Evaluated By:

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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 thirteen 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	Approaching Standard		

Performance Targets	Is the school’s educational program successful?	
	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
	Instruction	MS
	Attendance Rate	MS
	IDOE Accountability Grade	ES
	State Assessment Growth Model: English/Language Arts	DNMS
	State Assessment Growth Model: Math	AS
	State Assessment Legacy Data: English/Language Arts	DNMS
	State Assessment Legacy Data: Math	DNMS
	State Assessment Participation Rate	MS
	Benchmark Assessment Value Added: English/Language Arts	AS
	Benchmark Assessment Value Added: Math	MS
	Benchmark Assessment Legacy Data: English/Language Arts	DNMS
	Benchmark Assessment Legacy Data: Math	DNMS
Comparison to Local Schools	MS	

Instruction: High quality curriculum, coupled with highly effective teachers, ensures a student’s academic success. Therefore, Education One evaluates each of the schools in its portfolio to measure the quality of the school’s instructional practices. Does the school effectively implement its curriculum? Does instruction focus on core learning objectives? Are lessons appropriately paced to ensure high levels of rigor and challenge? Are there a variety of differentiated strategies to engage a wide range of student interests, abilities, and learning needs? Does classroom management increase the engagement of students in the lesson? Are students provided with timely feedback in order to help improve their instructional practices? These items were measured through monthly school site visits, which included classroom walk-throughs and observations.

Based on the qualitative evidence collected throughout the 2017-18 school year, Career Academy South Bend-Middle School (CASB-MS) receives a rating of **Meets Standard** according to their Accountability Plan Performance Rubric.

Attendance Rate: Starting at the age of seven, students in Indiana are required to attend school regularly. The Indiana Department of Education defines habitual truancy as ten or more days absent from school, meaning students are required to attend school for 95% of the 180 days in the school year.

Education One requires an attendance rate greater than or equal to 95%. CASB-MS has an aggregate attendance rate of 95.4%, and thus, **Meets Standard** according to their Accountability Plan Performance Rubric.

Grade Level Attendance Breakdown		
6 th Grade	95.8%	✓
7 th Grade	95.6%	✓
8 th Grade	94.8%	✗
Overall Average	95.4%	✓

IDOE Accountability Grade: In Spring 2017, 41.7% of CASB-MS students passed the English/Language Arts portion of ISTEP+, while 37.3% of students passed the mathematics portion.

In English/Language Arts, the school earned 92.5 points for Top 75% growth and 102.3 points for Bottom 25% growth, giving them 97.4 points for Overall Growth. In Math, the school earned 117.5 points for Top 75% growth and 104.6 points for Bottom 25% growth, giving them 111.1 points for Overall Growth.

The Indiana State Board of Education (SBOE) awarded CASB-MS with an ‘A’ for its 2016-17 school year performance. Due to the school receiving an accountability baseline reset in 2015-16, the school’s accountability grade only accounts for growth, which helped the school improved two letter grades from its 2015-16 accountability grade of a ‘C’ to an ‘A.’

Thus, the school receives a rating of **Exceeds Standard** on 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>

State Assessment Growth Model: Under the Indiana Growth Model, the IDOE compares each student’s growth on the state assessment from one year to the next and determines whether students made low, average, 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 growth percentile of students achieving growth in both English/Language Arts and Math to ensure that students are making adequate or substantial gains over time in comparison to whether or not students are considered proficient on the state assessment.

English/Language Arts: In 2016-17, 47% of CASB-MS students outgrew their peers at the same achievement level in English/Language Arts, which earns them a rating of **Does Not Meet Standard** on their Accountability Plan Performance Rubric.

Math: In 2016-17, 63% of CASB-MS students outgrew their peers at the same achievement level in math, which earns them a rating of **Approaching Standard** on their Accountability Plan Performance Rubric.

State Assessment Legacy Data: When calculating State Assessment Legacy Data, Education One looks at students who have been enrolled in the school for two or more years and how this group of students compare to the state’s summative assessment passing percentage.

English/Language Arts: The passing percentage for Indiana as a whole on the state’s summative assessment was 64% in English/Language Arts for students in fifth through eighth grade. CASB-MS legacy students had a passing rate of 36.4%. With a difference of 27.6% from the state’s average passing percentage, the school receives a rating **Does Not Meet Standard** on their Accountability Plan Performance Rubric.

Math: The passing percentage for Indiana as a whole on the state’s summative assessment was 57.7% in math for students in fifth through eighth grade. CASB-MS legacy students had a passing rate of 37.1%. With a difference of 20.6% from the state’s average passing percentage, the school receives a rating of **Does Not Meet Standard** on their Accountability Plan Performance Rubric.

State Assessment Participation Rate: The state assessment participation rate is used for state and federal reporting and accountability determinations. Education One requires a state assessment participation rate of at least 95% in order to meet standard. CASB-MS had an average participation rate of 98.6% for the 2016-17 school year, and thus, **Meets Standard** according to their Accountability Plan Performance Rubric.

Benchmark Assessment 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 Five-Star Pivot to effectively measure student achievement at the beginning, middle, and end of the school year.

The following tables indicate the percentage of students enrolled for at least one semester that met growth targets (an increase of 10%) on the Pivot assessment from the beginning to the end of the year in reading and math. The charts below indicate the average performance in each grade level at CASB-MS.

Key			
Exceeds Standard	Meets Standard	Approaching Standard	Does Not Meet Standard
✓	✓	✗	✗

Pivot Data: Reading				
Grade Level	Number of Students Enrolled in at Least One Semester	Number of Students Meeting Growth Goal	Percentage	Met Growth Target
6 th Grade	99	71	71.7%	✓
7 th Grade	83	55	66.3%	✗
8 th Grade	103	64	62.1%	✗
Whole School	285	190	66.7%	✗

Pivot Data: Math				
Grade Level	Number of Students Enrolled in at Least One Semester	Number of Students Meeting Growth Goal	Percentage	Met Growth Target
6 th Grade	99	70	70.7%	✓
7 th Grade	83	61	73.5%	✓
8 th Grade	103	71	68.9%	✗
Whole School	285	202	70.9%	✓

English/Language Arts: 66.7% of students met their growth goal on Pivot Reading. Therefore, the school receives a rating of **Approaching Standard** on their Accountability Plan Performance Rubric.

Math: 70.9% of students met their growth goal on Pivot Math. Therefore, the school receives a rating of **Meets Standard** on their Accountability Plan Performance Rubric.

Benchmark Assessment Legacy Data: When calculating Benchmark Assessment Legacy Data, Education One looks at students who have been enrolled in the school for two or more years and their grade level proficiency.

The follow tables indicate the percentage of students enrolled in at least two years that met proficiency targets on the end of the year benchmark assessment in reading and math.

Key			
Exceeds Standard	Meets Standard	Approaching Standard	Does Not Meet Standard
✓	✓	✗	✗

Pivot Data: Reading				
Grade Level	Number of Students Enrolled in Two or More Years	Number of Students who Scored a 45% on Pivot	Percentage	Met Proficiency Target
8 th Grade	91	40	44%	X

Pivot Data: Math				
Grade Level	Number of Students Enrolled in Two or More Years	Number of Students who Scored a 45% on Pivot	Percentage	Met Proficiency Target
8 th Grade	91	30	33%	X

English/Language Arts: 44% of legacy students were considered proficient on Pivot Reading. Therefore, the school receives a rating of **Does Not Meet Standard** on their Accountability Plan Performance Rubric.

Math: 33% of legacy students were considered proficient on Pivot Math. Therefore, the school receives a rating of **Does Not Meet Standard** on their Accountability Plan Performance Rubric.

Comparison to Local Schools: The following local comparison of schools was used to compare the results of the Spring 2017 ISTEP+ assessment. Therefore, 2016-17 enrollment data from IDOE Compass was used to compile the list of schools. Comparison schools were chosen based on their distance from CASB-MS and similar demographics in student population (i.e., Free/Reduced Lunch, Special Education, and English Language Learners). In 2016-17, CASB-MS was a 5-8 building.

School Name	E/LA Pass	Math Pass	E/LA Growth	Math Growth
Career Academy South Bend-MS (5-8)	41.8%	37.3%	47%	63%
School #1 (5-8)	38.4%	28.5%	46%	44%
School #2 (5-8)	17.5%	11%	27%	26%
School #3 (5-8)	22.9%	11.7%	44%	30%

CASB-MS performed better than local comparison schools in both proficiency and growth. Education One measures whether or not each of its schools outpaces local schools that students may have been assigned to in both proficiency and growth. Therefore, CASB-MS receives a rating of **Meets 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	Approaching Standard		

Performance Targets	Is the organization in sound fiscal health?	
	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, CASB-MS has not submitted a copy of the school’s completed audit for Fiscal Year 2015/2016 or 2016/2017. Without these documents, Education One is unable to determine whether CASB-MS showed 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.

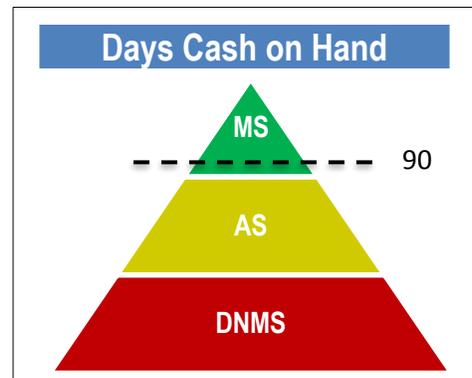
For these reasons, the school receives a rating of **Does Not Meet Standard** for the 2017-18 school year.

Enrollment Variance: Indiana calculates its state tuition support for schools one time per year. According to the Indiana Department of Education, CASB-MS had an enrollment count of 328 students as of September 2017.

Education One requires that each of the schools in its portfolio are within 98% of their budgeted enrollment in order to meet standard. As a whole, CASB-Network had an enrollment count of 1,276 in September 2017, with a budgeted enrollment of 1,225. This equates to a positive enrollment variance of 104%. 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 2.92 and therefore, the school receives a rating of **Meets Standard** on 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, 2018, 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**.



Debt Default/Delinquency: This metric is determined by analyzing the quarterly financial statements and contact with the school’s creditors. In the case of CASB-MS, neither its financials nor its creditors provided any indication that the school had defaulted on its debt obligations to date. 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	Meets Standard		

Performance Targets	Is the organization in sound fiscal health?	
	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
	Academic Leader Review		MS
	Governance		MS
	Charter Accountability Reporting Requirements		MS

Academic Leader Review: CASB-MS is a part of the Career Academy South Bend Network (CASB-Network), which oversees three schools in South Bend. During the 2017-18 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.

During the 2017-18 school year, Principal 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. Principal Jagger has experience teaching and leading within and outside the network, and has demonstrated strong academic outcomes for the students of CASB-MS. Through her leadership, the school has maintained stability in key administrative and teaching positions.

Ms. Jagger has continuously proven to be an excellent communicator, consistently providing information to and consulting with the schools' board of directors, Education One, and other key stakeholders. In addition, she attends all CASB-Network board meetings as well as meetings with the Education One team. During these meetings, she provides detailed updates pertaining to student performance, student recruitment and retention, school initiatives and major events.

In her time as School Leader, Ms. Jagger has engaged her staff in a continuous process of improvement and has established clear systems and processes for addressing areas of deficiency in a timely manner. Under her leadership, CASB-MS has undergone drastic improvements, including maintaining a high attendance rate and increasing student proficiency and growth. Ms. Jagger's academic expertise, high expectations for staff and strong organizational skills have allowed her to lead the implementation of effective strategies in response to data at every level.

Overall, due to the Principal's experience and demonstrated ability to achieve results, CASB-MS receives a **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 nine 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 as well as developing a self-assessment system to further identify areas of deficiency.

During the 2017-18 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 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 the operations of the board, meetings were scheduled monthly; however, meetings were routinely cancelled. At the time this report was written, the board had 11 opportunities to meet, but only met 63.6% of the time. However, when regularly scheduled board meetings did take place, the CASB-Network board 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, multiple deadlines related to quarterly financials, school audit, and School Leader evaluations were not met during the school year, making it difficult to effectively evaluate the network in real time.

The CASB-Network board has created a positive and collaborative working relationship with the network leadership team and Education One. Therefore, the board receives a rating of **Meets Standard** according to their Accountability Plan Performance Rubric.

Charter Accountability Reporting Requirements:

During the 2017-18 school year, Ms. Jagger, CASB-MS School Leader, and Kim Richardson were primarily responsible for submitting compliance documents to Education One. Documents such as employee spreadsheets, board meeting minutes, and academic data were routinely submitted on time. However, quarterly financial reports were often incomplete. Financial statements were brought up to date by April 2018. 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 and actively engaged in meetings with Education One and maintained sufficient communications 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
	Approaching Standard	Meets Standard	Does Not Meet Standard		

Performance Targets	Is the organization in sound fiscal health?	
	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.

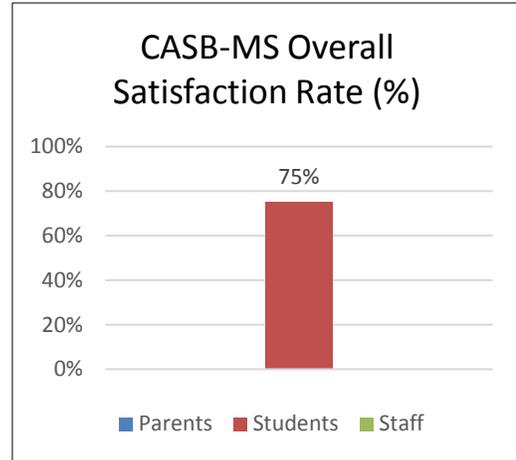
Sub-Indicator Ratings	Sub-Indicators	Rating
	School-Wide Satisfaction	DNMS
	Survey Participation	N/A

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 survey, conducted during spring 2018, indicated that CASB-MS was **approaching standard** regarding student communication, with 75% of students reporting overall satisfaction with the school.

Survey results for parent and staff satisfaction were unable to be processed for CASB-MS as survey results for CASB-MS and CASB-HS were populated together, which **does not meet standard**.

Overall, CASB-MS **Does Not Meet 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. Population size and sample size are listed for CASB-MS stakeholders in the table below.

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**	302	242	80.1%
Staff	N/A	N/A	N/A

*Please Note: The Parent group utilized the total number of families surveyed, rather than total number of individual parents

**Please Note: The student group includes students in grades 6-8.

Education One needs to see individual surveys for CASB-MS for parents, students, and staff from this point forward. 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 2017-18 school year. There was noted improvement in the established collaborative leadership method.

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 development of staff and implementation of instructional best practices as it relates to rigor, differentiation, and project based learning methods