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Executive Director Ramsey,

Please accept this letter and detailed responses as demonstrated evidence of Duval County Public Schools' adherence to section 1008.33(4)(b), Florida Statutes which states 'the district must contract with an outside entity that has a demonstrated record of effectiveness to operate a school', as well as the assurances articulated in the district's 2018-2019 Turnaround Option Plans (TOP), submitted on behalf of Lake Forest Elementary, Northwestern Middle, and Matthew Gilbert Middle Schools.

Adhering to all currently adopted district policies and procedures for contracting with external service providers, Duval County Public Schools, through a request for information process and a fact finding committee, researched external providers that had a proven track record of success in turning around elementary and/or middle schools similar to Lake Forest Elementary, Matthew Gilbert Middle School, Northwestern Middle School and the community of students they serve. This process began with establishing a timeline that would support the guidelines from FLDOE that the contracted external operator would be well positioned to assume the transition of all operational management and instructional oversight of the identified schools, in the event that any/or all of the three schools failed to earn the necessary grade of "C" or higher, at the end of the 2017-2018 school year.

Below you will find our detailed responses to the questions presented in the Florida Department of Education memorandum dated April 23, 2018.

Provide the outside entity/external operator's evidence of a demonstrated record of effectiveness per statutory requirement.

Educational Directions, Inc. ("Educational Directions") presented data from eleven Florida schools for review along with other documentation of their demonstrated record as evidence of their record of prior effectiveness. While not all schools served had identical demographics to our identified TOP schools, more than ninety percent of the schools supported by Educational Directions demonstrated improved academic performance in multiple school grade components. More specifically, one hundred percent of the schools improved in science, social studies, and middle school acceleration. Additionally, data presented reflected improvements in the math bottom quartile.

Educational Directions presented data which demonstrated marked increases in school performance of ninety percent or higher in seven out of twelve measured accountability areas. Under this company's management, the percentage of total points improved for all eleven schools. Ten of the eleven school grades, or ninety-one percent, showed improvement of at least one letter grade. Of the schools

reviewed, each of their school accountability grades improved to a C or higher with two schools achieving the grade of “A”.

In trying to find strong comparative data in schools which have been supported by Educational Directions subgroup enrollment data were analyzed to find similar school populations and barriers to learning. Westwood Middle School and Palmetto Elementary School in Polk County are the two schools with the closest demographics to Lake Forest, Matthew Gilbert, and Northwestern. Westwood Middle School is comparable in size and percent of students with disabilities to Gilbert and Northwestern. Palmetto Elementary School is similar to Lake Forest in size, percent of minority students, FRL students, and students with disabilities. Westwood showed growth in two-thirds of all areas of their school grade calculation from 2015-16 to 2016-17. Palmetto ES showed growth in all areas of their school grade calculation. With Duval County Public Schools having two middle schools that may require an external provider, it was very important that our external operator had demonstrated evidence of effectiveness with similar grade configurations. Educational Directions was able to not only provide evidence with elementary school success, but they were also able to provide evidence of success with middle schools which accounted for five of the eleven schools managed by Educational Directions, INC.

Explain the role of the outside entity/external operator in the recruitment, selection, and placement, of instructional personnel with proven experience and capacity to service students who may need intensive remediation and instruction. Include specific information about the external operator’s authority in this area.

The district has entered into an agreement with Educational Directions as an external operator under the district’s Turnaround Option Plan for the identified schools. The agreement provides in pertinent part that primary management of personnel, to include selection, placement and evaluation of school-based *instructional (emphasis added)*, administrative and support staff shall be provided by the Contractor. The contract further requires that all school staff will be selected through an interview protocol established by the external operator. The language specifically excludes from eligibility, any teacher with end of year state VAM data or overall summative evaluation in the Developing, Needs Improvement or Unsatisfactory range.

The district is committed to providing Educational Directions with all allowable performance and personnel information available for current employees needed to ensure that the school’s instructional personnel, as selected by Education Directions, have proven experiences of providing services to students requiring intensive remedial instruction. At a minimum, such data shall include: allowable individual teacher evaluation data and other pertinent personnel records. To assist with ensuring a sufficient applicant pool, the district has entered into an agreement with the bargaining agent for instructional personnel to be provided retention and varied performance incentives. Performance values range from \$2,000 - \$5,000 annually and an additional \$2,000 retention incentive is available to existing employees, selected by Educational Directions to remain at the current school.

The District’s Human Resources staff shall continue to provide operational services such as processing of applicants, verification of proper certification and conducting statutory background and reference checks to facilitate the onboarding or transfer of personnel at the school. Educational Directions has been provided access to all scheduled district recruiting activities, including annual transfer fairs and local hiring events. Such access allows the provider access to applicants pre-screened for certification eligibility by the district and extended interview times for TOP schools. To

further assist with staffing needs, minimum experience requirement for internal candidates have been waived to allow transfer of candidates selected by Education Directions.

Explain the role of the outside entity/external operator in the recruitment, selection, placement, training and oversight of the school leadership team, including specific information about the external operator's authority in these areas. Provide evidence the school leadership team has a proven record of success in turnaround schools and the qualifications to support the students served.

The agreement between the District and Educational Directions provides in pertinent part that primary management of personnel, to include selection, placement and evaluation of school-based instructional, *administrative (emphasis added)* and support staff shall be provided by the Contractor. The contract further requires that all school staff will be selected through an interview protocol established by the external operator.

The External Operator will have full authority and discretion in the selection and hiring of the administrative leadership team and all staff. However, the district will collaborate with the external provider to develop a candidate selection pool of possible candidates that meet mutually agreeable leadership characteristics. Characteristics will include, but not be limited to, prior experience as a school leader in a turnaround school, record of academic performance in all measurable/assessed content areas, demonstrated effectiveness with improving school culture, evidence of implementation of strategies to address early warning indicators (such as attendance, discipline, suspensions, etc.) and experience with stakeholder engagement.

The district will collaborate with the external provider to develop mutually agreeable characteristics for the leadership team. Characteristics should include, but not be limited to, prior experience as a school leader in a turnaround school, record of academic performance in all measurable/assessed content areas, demonstrated effectiveness with improving school culture, evidence of implementation of strategies to address early warning indicators (such as attendance, discipline, suspensions, etc.) and experience with stakeholder engagement.

As part of the initial assessment of each school by Educational Directions, contracted staff have worked collaboratively with current school leaders to review current professional learning opportunities being provided through district and school trainings. Additionally, staff have been afforded an opportunity to provide input regarding desired professional development for the upcoming year. The 2017-2018 state and district performance data will be used to finalize professional development offerings for the upcoming year. Such training shall be differentiated for each school based on the school's individual need and faculty/staff composition. In order to allow instructional and administrative staff time to analyze year end data and prepare for the upcoming year, each school has been allocated up to five (5) additional workdays prior to the beginning of the school year for implementation of site-based professional development to be managed and implemented by the contractor.

If the district had a partnership with the outside entity/external operator, explain the difference in the proposed services changing from a partnership to an operator.

Although Duval County Public Schools has engaged in partnership and contracted services in previous years with Educational Directions, DCPS was not currently partnering or contracting services with Educational Directions prior to our signed contract agreement submitted to BSI as a component of our Turnaround Option Plans for 2018-2019 school year.

Provide a detailed budget for the contracted amount with the outside entity/external operator.

The financial impact and budgeted scope of work with Educational Directions includes the following:

Phase I: Spring, 2018 - \$65,950 per school, not to exceed \$197,850 for all three schools for analysis, planning, and mobilization.

Phase II: Summer 2018 - Not to exceed \$32,550 per school, not to exceed \$97,650 for all three schools for external operator management services.

Phase III: Summer 2018 through Summer 2019 - Not to exceed \$242,500 per school, not to exceed \$727,500 for all three schools for external operator management services.

Maximum Agreement will not exceed \$341,000 per school for a maximum potential cost of \$1,023,000.

Education Directions Phase I–III Scope of Work and Timeline

Phase I - Initial School Assessment. Contractor will complete a comprehensive needs assessment (“Needs Assessment”) for the School. The Needs Assessment will include all available state, district, and School level current and historical data to identify root causes of barriers to student learning, teacher retention, and/or the daily learning environment. Additionally, a review of personnel data, leadership, current staffing allocation, funding (federal, state and other funds), instruction, curriculum, academic intervention systems, professional learning communities, data teams, common planning, instructional coaching, and the student assessment process will occur.

The needs assessment will also review all centralized District supports to the School, students, staff, and community which includes but is not limited to areas such as budget, facilities, supplies, maintenance, food service, transportation, IT infrastructure and resources. An additional component of the Needs Assessment will involve an on-site analysis will be conducted to identify comprehensive support and improvement needs of the School in the five essential areas necessary for increasing overall student achievement. This Needs Assessment will form the basis for the 2018-19 School Plan.

<u>Timelines</u>	<u>Phase</u>	<u>Description</u>	<u>Deliverable(s)</u>	<u>Dates of Service</u>	<u>Cost</u>
February 15 – May 31, 2018	Phase I	Needs Assessment/Comprehensive review and documents.	Executive summary will be provided to the District Leadership Team demonstrating analysis of all provided records and recommendations and propose strategies for implementation.	June 2018 presentation to Executive Leadership of Findings.	\$65,950 (\$32,975 invoiced no earlier than February 15, 2018 for purposes of Contractor’s mobilization for Phase I, and \$32,975 invoiced no earlier than May 31)
		Needs Assessment/Onsite Analysis	Executive Summary of Analysis to include: <ul style="list-style-type: none"> ▪ Summary of Areas Observed ▪ Proposed Staffing Report ▪ Review of School-Systems (and proposed recommendations) ▪ Programs ▪ Use of Resources ▪ Community/Family Engagement ▪ School Environment ▪ Instructional Systems ▪ Curriculum ▪ Resources and Materials 	Weeks of April 23 – Aprils 27 th and April 30 – May 4 th . Half day and full-day Area observations of the following: <ul style="list-style-type: none"> ▪ School Environment ▪ Current Programs ▪ Instructional Systems ▪ Daily Operational Systems (Note: No teacher, student, or parent contact outside of observation of practices school administration only from 4/23 – 4/4.)	

<u>Timelines</u>	<u>Phase</u>	<u>Description</u>	<u>Deliverable(s)</u>	<u>Dates of Service</u>	<u>Cost</u>
				<p>Onsite Focus Groups with staff and faculty. Week of May 14 – 18th.</p> <p>May 15th CAT Meeting Introductions of EO to stakeholders</p>	
		Needs Assessment/Report of Initial Findings and presentation of comprehensive School Operational Plan	<p>Operational plan for 2018-2019. The operational plan shall include the following planned processes and/or procedures for:</p> <ul style="list-style-type: none"> • Staffing plan and agenda for school site visits (include the number of days set aside in the plan; • Master Schedule and academic instructional plan which identifies specific strategies to be used as key levers in making data decisions to support changes in instructional practices, school culture, community engagement and effective resource management specific to literacy, mathematics, 	May 15, 2018 Teacher Transfer Fair Participation with HR	

<u>Timelines</u>	<u>Phase</u>	<u>Description</u>	<u>Deliverable(s)</u>	<u>Dates of Service</u>	<u>Cost</u>
			<p>sciences, social studies, and other instructional courses being offered during the 2018 – 2019 school year;</p> <ul style="list-style-type: none"> • Professional Development Plan: the plan will detail specific trainings for the School leadership and instructional staff; • Assessment and Progress Monitoring: description of the system for planning, reviewing/ monitoring student learning outcomes, developing teacher best practices, implementing teacher coaching plans, analyzing School instructional/ climate data; and plan for communicating student academic performance to parents. <p>Presentation to the School Board and District Leadership Team</p>		

<u>Timelines</u>	<u>Phase</u>	<u>Description</u>	<u>Deliverable(s)</u>	<u>Dates of Service</u>	<u>Cost</u>
June 1 – July 15 2018	Phase II	Identification and Selection of Personnel; Leadership Development and Strategic Planning	Final Staffing Plan with detailed Roster, Summary of Recruitment Efforts and Materials, and Leadership Professional Development Agendas and School Improvement Plan; Community Engagement Plan	June 8, 2018 Recruitment Fair Participation with HR	\$32,550 (\$16,275 invoiced no earlier than June 1, 2018 for purposes of Contractor’s mobilization for Phase II, and \$16,275 invoiced no earlier than July 15, 2018)
July 16 – Aug 12, 2018	Phase III (Period 1)	Contractor assumes full operation of School systems.	State Reporting as required for external operators, and providing the District a detailed executive report providing updates and next steps on the following areas but not limited to: <ul style="list-style-type: none"> • Current Staffing Status (Full Roster) • Student FTE data • Projected student enrollment to include Spring 2018 State Assessment Data • Early Return teacher and Staff Professional Development Agenda and 	Turnaround Leadership Development training July Staff Early Return August 1 st thru August 3 rd . IT and Budget and HR Access and training to internal systems if necessary for identified schools (Cocker-Daniel; Begley/Fagan)	\$40,000 (\$20,000 invoiced no earlier than July 16, 2018 for purposes of Contractor’s mobilization for Phase III, and \$20,000 invoiced no earlier than August 12, 2018)

<u>Timelines</u>	<u>Phase</u>	<u>Description</u>	<u>Deliverable(s)</u>	<u>Dates of Service</u>	<u>Cost</u>
			supporting documentation <ul style="list-style-type: none"> • Family/Parent Engagement Event Agendas 		
July 1 – Aug 10, 2018	Phase III (Part B)	Partnership Contract Negotiations	In the event the school earns a grade of “C” or higher, contracted partnership of support would finalize for Phase III implementation of services.	Tentative Board Agenda item, August 7 th	TBD
Aug 13 – Oct 15, 2018	Phase III (Period 2)	Quarter 1 Analysis	State Reporting as required for external operators, and providing the District a detailed executive report providing updates and next steps on the following areas but not limited to: <ul style="list-style-type: none"> • Staffing (Positions and vacancies) • Student FTE data • Discipline • Grade Distribution • Assessment Data for Core subjects • Professional Development agendas and supporting documents • Observational data on instructional staff 		\$45,000 (Invoice dated no earlier than Oct. 15, 2018)