

Great Oaks Charter School

RESPONSE TO FOLLOW-UP REQUESTS ASSOCIATED WITH MAJOR MODIFICATION APPLICATION INITIAL REPORT

Initial Meeting: April 27, 2021
Initial Report Published: May 5, 2021
Response Published: May 20, 2021

On March 18, 2021, Great Oaks Charter School (Great Oaks) submitted an application for a major modification of its charter. On April 27, 2021, the initial meeting of the Charter School Accountability Committee (CSAC) was conducted. On May 5, 2021, the major modification application initial report was shared with Great Oaks. Responses to the follow-up requests (in **bold**) are below.

Information on how parents have responded to the school’s modification request.

Our Great Oaks parents are in support of our modification as demonstrated during our recent public comment hearing for this modification. We have announced and outlined the details of this modification request in multiple monthly public board meetings this year. We planned our modification with our current families in mind. Our plan includes a gradual transition from a middle-high school model to a high school exclusively by eliminating a lower grade each year while maintaining the enrollment of all current students. Once we have Secretary Bunting’s approval of this modification, we will accept applications for the 7th, 8th and 9th grade for this upcoming school year and 8th and 9th the following school year.

Information on recruitment process for high school students to include:

- **How they will address the large increase from 42 freshmen to 100 freshmen in only two years.**
- **An explanation of past target enrollments, actual enrollments and reasons for missing targets.**

Activity	Description	Timeline
Postcard mailers	Partnered with First Ascent to send out separate mailers. Reach over 30k households with children.	May - September
FB and IG Advertisements	Daily targeted advertising to families through IG and FB pop-up ads	Began in April ongoing
Canvassing	Volunteers canvassing through Cultural and Community Solutions.	June - ongoing
Staff Canvassing	Great Oaks leadership team and staff will canvass the City of Wilmington community.	July
Retention Phone Calls	Each family received at least one phone call every week to check-in and see if they needed any support.	May-September
Virtual Learning Q and A	Hosted virtual learning Q and A with new and returning families.	Monthly
Internship opportunities	Providing students opportunities to have access to experience working with corporate and civic partners	ongoing
Community Leader Meetings	Meet weekly with different community leaders to discuss partnerships and collaboration (for example, Bank of America, Network Connect, Teen Warehouse, Community Intervention Team, Multiplying Good, Junior Achievement, NCC, etc.)	May-September
Activity	Description	Timeline

Free chromebook and uniform	All new families receive a new Chromebook and two new uniforms.	May-ongoing
Current student outreach	Using Great Oaks database - reach out to all contacts to get referrals for possible new students.	May - September
Open enrollment for 7th, 8th & 9th	Open enrollment -accept applications for 7th, 8th and 9th grade for this upcoming year and 8th and 9th the following school year.	ongoing
Community Events	Tables at community events and community locations. Stubbs back to school event, YMCA, Epiphany Church etc.	ongoing
Parent Engagement	Began parent engagement during the summer. Formed staff committee to brainstorm best practices for engaging parents. First parent meeting was in August.	Monthly - ongoing
New Student Referral events	Great Oaks will host our current 7th, 8th and 9th grade class and invite their friends to join.	June through September

- With the guidance of the Great Oaks Board, our leadership team is committed to continue to collaborate with our partners such as the Community Education Building and other community organizations to expand our facilities as needed.
- We are reimagining our instruction and curriculum to ensure alignment with State of Delaware Standards in all core content areas. We are taking advantage of the opportunity and positive momentum that we are gaining to reset our school's academic and cultural brand. We will scale up as our enrollment increases.
- Increase outreach efforts
- Utilize teachers and staff with community relations in our recruitment efforts

It is important to note to the Charter School Accountability Committee that as of 07/01/2020, our Great Oaks Wilmington Charter Board voted to change our management from Great Oaks Foundation based out of New York to complete governance and management by our local Governance Board who are made up of Delaware stakeholders. This is significant in addressing the unique needs of this school community.

Information on their lease with the CEB. Will there be an early termination fee?

There will be no early termination fee. The lease is being amended, not terminated. CEB leadership will provide an aligned response to confirm.

NOTE: for the curriculum section, although it is not best practice to make curriculum changes in the middle of the modification process, we believe that it is in the best interest of our students to do so at this time. Please see below and linked for our thought processes and the scope & sequence documents to support our curriculum decisions.

- *ELA (7 - 8): CommonLit 360 - documents already submitted*
- *ELA (9 - 12): Engage NY*
- *Math: Illustrative Math*

Submit a scope and sequence documents for grades nine and ten from the *CommonLit 360* curriculum. The submitted link only provides these documents for grades six through eight. While this curriculum will not be fully available until June 2021, these documents were available on the *CommonLit* website.

During Summer 2020, *CommonLit 360* was selected as the official ELA curriculum for grades six through ten. Great Oaks prioritized this curriculum for several reasons, including accommodating a new educational paradigm shift of virtual learning. Here are the priority reasons listed below:

- Emphasis on solidifying foundational skills through highly-rated curriculum,
- Differentiated instruction for diverse learners,
- Attention to ELL students,
- Accessibility to students through distance learning,
- Engaging text and level

Since for 2021-22 *CommonLit 360* will not be able to offer full curricular materials through 12th grade, we identified the need for a curriculum that aligns grade levels 9-12 and create HQIM for the high school. Great Oaks ELA curriculum will be *Engage NY*, which provides high-quality content for all learners. *Engage NY* is a comprehensive, standard-aligned pathway upholding the commitment to give all students access to grade-appropriate content which has proven to close the academic gap. *Engage NY* allows for vertical alignment to occur in 9-12 grade; it creates opportunities for rigor and differentiation so that students can remain engaged on their level texts and beyond.

Great Oaks prioritizes this curriculum because it points to the connection between exposing all learners to grade-level content and high-quality academic experiences through MTSS initiatives. In alignment with MTSS, the curriculum with culturally responsive texts featuring diverse authors and protagonists, focusing on student voice, discussion, collaboration, problem-solving, and project-based learning. Additionally, the program addresses solidifying foundational skills with an emphasis on research-based pedagogical approaches aligned with the school's core standards and ELA curriculum.

Scope and Sequence:

- [EngageNY 9-12 Curriculum Map](#)

Submit one unit document from the *CommonLit 360* curriculum for grade ten. The submitted link only provides this document for grade nine. While this curriculum will not be fully available until June 2021, these documents were available on the *CommonLit* website.

ENGAGE NY Unit examples (links)

Units below engages students in rich text and engaging topics. Emphasizing learning through explicit writing, including information, argumentative, and narrative.

- [9th grade Unit 1](#)
- [10th grade Unit 1](#)
- [11th grade Unit 1](#)
- [12th grade Unit 1](#)

Submit documented alignment between primary instructional resources, assessments, academic MTSS supports, and all partner instructional supports (Tier 3).

Beginning in SY 21-22, Great Oaks will utilize *Illustrative Mathematics (IM)* for Tier 1 mathematics instruction. Our math coach will provide support in the areas of mathematics teaching practices (MTPs; Brahier, Leinwand, Huinker, 2014), philosophy and instructional routines of *IM* for teachers and school leaders, as well as ongoing professional learning (PL) in using a similar approach to unpacking units in *IM*. PL will take place from the math coach in coordination with the Director of Student Support Services to support our teachers in their alignment of MTSS with Tier 1 instruction, specifically through the use of lower grade-band *IM* units directly related to prerequisites needed for current unit of Tier 1 instruction, based on *IM* diagnostic assessment data, to support Tier 2 instruction in MTSS. All team members, including our school leaders, will work to ensure instruction is centered on the vision for mathematics rooted in *IM*'s instructional model.

Beginning in SY 21-22, Great Oaks will utilize *Engage NY* for Tier 1 English Language Arts instruction. Our Director of Literacy will provide training to support teachers through ongoing instructional coaching to support unpacking the curriculum (pacing guides, curriculum mapping, lesson planning, etc.) and differentiating for diverse learners. Professional Learning will take place from the Director of Literacy in coordination with the Director of Student Support Services to support our teachers in their alignment of MTSS with Tier 1 instruction, specifically through the use of lower grade band *Engage NY* units to support Tier 2 instruction in MTSS. All team members, including our school leaders, will work to ensure instruction is centered on the vision for ELA rooted in *Engage NY*'s instructional model.

Tier 2 academic support through MTSS will occur through lower grade-band materials sourced from *IM* and *Engage NY*.

Tier 3 academic support through MTSS come from research-based *Math Pathways and Pitfalls* (WestEd, 2010) and *Leveled Literacy Intervention*.

The team will continue to utilize NWEA/MAP as an initial universal screener. This data allows teachers to pinpoint skills needed in Tier 3 instruction. The team will utilize data from *IM* and *Engage NY* diagnostic assessments to individualize plans for academic MTSS at the Tier 2 level.

Information on the thought process in selecting “Reveal Math” as their math instructional resource.

During Summer 2020, a decision was made to officially select curriculum materials for all core content areas. EdReports’ green-rated MS/HS mathematics curricula were shared with faculty who had already been hired for the 2020-2021 school year, which included former Algebra 1/Geometry and current Algebra 2/Pre-Calculus teacher Anthony Davis, former sixth-grade teacher and recently appointed Executive Director Leland Kent, then high school Principal Amanda Taylor, and middle school Assistant Principal Tamara Price. While Great Oaks did not use a formal process to select *Reveal*, we did know that we would need instructional materials connected with a strong online platform for this year as we anticipated a year dominated by remote instructions. We believed at the time that *Reveal* would work best for our school.

However, after our team attended the Delaware Department of Education Reimagining Professional Learning Grant Summit on March 13, 2021, we determined that a more formal process needed to be conducted. Since then, the team, which includes the original team as well as Principal Samanta Lopez, Math Department Lead Teacher Michael Williams, and Math Coach Annette Roskam, has reviewed classroom visit and walkthrough data, PLC agendas and participation, coaching conversations, observations of student experience with *Reveal*’s online platform and Schoology (also new to Great Oaks this school year). Additionally, the leadership team has begun unpacking the portrait of a Great Oaks graduate, based on Great Oaks’s vision and mission, to support the development of a schoolwide instructional focus.

Although rated green on Ed Reports, curricular materials selected in August do not offer guidance for teachers on differentiating tasks, fostering discussion, providing just-in-time supports, or adapting materials for remote learning and limited classroom time. The online version of the materials adopted in August, 2020 offered an additional example for each example in each lesson and emphasized answer-getting, however, during this pandemic year where so many things were happening, it was a hardship on our teaching staff to also have to come up with engaging instructional activities. Coupled with levels of classroom discourse observed throughout the year, even with efforts to provide PLC-based professional learning and co-planning focused on posing purposeful questions and eliciting and using evidence of student thinking, this data illuminated the need for curricular materials organized into coherent learning trajectories, with rich, carefully selected mathematical tasks and purposeful discourse supports for teachers. Since the materials we used this year were not selected using a formal curriculum selection tool, as recommended at March RPL Summit, we decided to re-examine our choices while maintaining the same provider of curricular materials from Math 6 to Algebra 2.

Our current instructional practices are not aligned with our instructional vision. Mathematics instruction contains minimal opportunities for students to problem solve, think critically, or communicate with each other. Current scheduled instruction time is disproportionately spent on Tier 2 and Tier 3 instruction (approximately 180 min per week) than on access to Tier 1 grade level instruction (approximately 90 minutes per week). It also discourages academic risk taking, and promotes neither agency nor identity. Our existing curriculum materials do not adequately provide staff with ways in which to support students’ development of the habits of mind needed (the Common Core State Standards for Mathematical Practice (CCSS-MPs) to become mathematically literate. Coaching efforts this school year began the shifts needed to

change instruction: fostering students' developing CCSS-Mathematical Practices and teachers' developing mathematics teaching practices. However, having curriculum materials which facilitate this work will bolster these efforts. We need materials which:

- Are coherent across Math 6 to Algebra 2;
- Incorporate grade-level tasks which are accessible to diverse learners and learners who may not yet be proficient at grade level;
- Support teacher learning by providing mathematical and pedagogical background;
- Support enactment of high-quality instruction through well-designed lesson plans; and
- Are designed to foster academically safe classroom communities.

We returned to our curriculum selection process. Only *Illustrative Mathematics (IM)* fits all of our criteria. We will pilot *IM* across all courses Math 6-Algebra 2 (if the charter modification is approved, Math 7-Algebra 2) for the 2021-2022 school year. We also will use *IM* to create a coherent co-requisite model (similar to DelTech's revised instructional plan, informed by University of Texas's DANA Center, as outlined in Molli Carter's presentation to Delaware Mathematics Coalition, March 4, 2021) of multi-tiered mathematics instruction as part of our MTSS plan. Using *IM* for all tiers will allow us to maintain philosophy, instructional routines, and models across tiers of instruction.

This pilot will be overseen by math coach Annette Roskam in collaboration with a certified *Illustrative Mathematics* professional learning facilitator and, pending RPL Grant Award for implementation, in partnership with ANET. Final selection confirmation will be made in spring 2022. Additionally, we are planning to connect Tier 1 use of *IM* to Tiers 2 and 3 of MTSS by using the *IM* curriculum adaptation packs, and diagnostic assessment and cool down guidance to identify and implement the just-in-time supports needed for students whose unfinished learning may impact their ability to be successful in Tier 1 instruction. This will support alignment of pedagogy and approaches to content across all MTSS tiers for mathematics while ensuring just-in-time and just-enough support.

Scope and Sequence

- [IM 6-Algebra 2 Scope and Sequence](#)

Sample Units

- [Math 7 Unit 2 Introducing Proportional Relationships](#)
- [Math 8 Unit 1 Rigid Transformations and Congruence](#)
- [Algebra 1 Unit 2 Linear Equations, Inequalities, and Systems](#)
- [Geometry Unit 2 Congruence](#)
- [Algebra 2 Unit 2 Polynomials and Rational Functions](#)

Information on how Great Oaks is supporting students within their primary math instruction and how they are connecting supports from outside of their current primary math instruction.

Great Oaks is actively developing its MTSS structure. Due to a number of reasons, including a pandemic year that has impacted the learning of students across the country, many of our students perform below grade level. To address these learning needs, we are creating a co-requisite model of instruction for the 2021-2022 school year, modeled after University of Texas' DANA Center recommendations, so students will have just-in-time mathematics support and/or enrichment. We will use a combination of universal screener (MAP), SBAC and P/SAT, and curriculum-based (*IM*) diagnostic assessment data to identify content for Tier 2 supports in conjunction with recommendations from *Illustrative Mathematics (IM)* Diagnostic Assessment Teacher Guide, Curriculum Adaptation Packs, and Cool Down Guidance. Further support in identified areas of critical prerequisite content will be provided in Tier 3 middle school tutorial by AmeriCorps Mathematics Fellows, under the guidance of the Mathematics Coach and in collaboration with content teachers. Content will be aligned with content being taught in Tier 1, and every effort will be made to systematically identify instructional needs in advance enough that content of Tier 2 and 3 supports can proactively prepare students for Tier 1 content to best set students up for success. Additionally, Tier 2 and 3 supports will include targeted support of students in becoming comfortable with the instructional routines and mathematical models embedded in *IM*.

Information on how the school plans to ensure that their policies, practices and procedures for special education students are in compliance with Federal and State regulations and a plan for training staff in these areas.

The Director of Student Support Services has worked closely with DDOE during SY 20-21 to ensure policies, practices and procedures for special education students are in compliance with Federal and State regulations and a plan for training staff in these areas.

- All members of the Special Education team participated in professional development with Maria Locuniak and completed a PDMS course on Standards Based IEPs during SY 20-21. Moving forward, this PDMS course will be assigned to any teachers joining the team.
- The Director of Student Support Services coordinated with Maria Locuniak to provide professional development to school psychologists who work on a contracted basis to ensure Evaluation Summary Reports are conducted in accordance with regulations.
- The following documents have been developed in collaboration with Maria Locuniak–
- IEP from Start to Finish
 - This document outlines the timelines in which each step of the IEP process should take place, beginning scheduling the annual IEP meeting six weeks in advance and ending with quarterly progress monitoring based on the annual IEP. This document is utilized by case managers to ensure that no step of writing an IEP is overlooked or non-compliant. This supports the special education teachers, particularly newer staff, as they learn all of the regulations.
- Special Education File Management
 - This document outlines the process followed by the Director of Student

Support Services to ensure that files are maintained and compliant in accordance with regulations. This file outlines the procedure for Audit File Organization, Eligibility for Services, Summer Case Management/Planning, Fall Case Management, Ongoing Case Management, Consulting with other professionals, and Progress Monitoring.

- IEP Checklist- File Review
 - This document is completed annually by the case manager and submitted to the Director of Student Support Services for review. This document serves to ensure individual audit files are reviewed annually and remain in accordance with regulations. The grade level case manager submits this document to the Director of Student Support Services for review. The Director of Student Support Services then conducts an internal review of a random selection of files at each grade level to ensure accuracy. The Director of Student Support Services utilizes the checklist provided by the DDOE when conducting this internal audit. The Executive Director assists with this final check as well.

The Director of Student Support Services has also provided professional development to both the Special Education team and whole staff throughout SY 20-21.

- Beginning of year professional development sessions were conducted to help all staff understand and implement IEPs, improve collaboration between special education and general education teachers, understand and implement co-teaching, ensure the use of accessible instructional materials when appropriate, and train all staff on the implementation of RtI. Throughout the year, additional whole staff training has been provided on RtI, implementation of IEPs in the remote setting, differentiation, and further understanding IEPs as well as a range of common disability classifications. RtI “office hours” have also been available to all staff on a regular basis with the Director of Literacy, Math Coach, and Director of Student Support Services to ensure staff can ask questions in a timely manner and continually improve their implementation of RtI.
- Professional development specific to the Special Education team has taken place through both whole team meetings and differentiated professional development for staff as needed. The Director of Student Support Services conducted a five part training series with first year teachers to support their writing of IEPs. Weekly training topics are adjusted to meet teacher needs and have included co-teaching and co-planning, use of choice boards for differentiation, transition planning, IEP meeting facilitation, data tracking, specific utilization of NWEA/MAP data to inform IEP goals, progress monitoring, lesson planning, extended school year, and comprehensive data considerations in IEPs. Additionally, both the math coach and outside transition service providers have attended Special Education team meetings to provide relevant training in the areas of mathematics IEP goals and transition planning respectively.

An overview of how many current teachers will remain on staff during the transition.

Based on an intent-to-return survey that was given in early April and informal conversations with our teaching team, we anticipate that 19/25 of our current teachers intend to return in the coming school year.

The six staff members who have noted that they will not return are departing for a variety of reasons, including moving out of state to be closer to family and pursuing other career goals at the completion of their 2-year TFA obligations.

As we seek to hire new teachers, we will prioritize veteran teachers and teachers who have already obtained their standard certificate.

Retaining high quality teachers will be a focus in the coming year. In response to teacher feedback, we will provide additional support for all teachers, including additional support for the use of high quality instructional materials.

A plan for mentoring for any teacher that requires mentoring and ensuring that evaluations are updated, on time, in the Data Service Center.

Despite the tight constraints of this past school year, we were able to ensure that all but one of the eligible teachers received mentoring through the Comprehensive Induction Program. The one teacher who did not complete came on board partway through the school year and elected to wait until next year to start fresh.

Based on current staffing projections, we plan to have 16 teachers in years one and two of CIP for the 2021-2022 school year and eight eligible mentors. It should be noted that we are prioritizing teachers who have already acquired continuing licenses in our hiring processes for the 21-22 school year, to prevent our mentors from becoming overloaded with mentees. In past years we have filled our teaching positions with internal hires from the GO Teacher Residency, a program connected to the Great Oaks Fellows. Since we reduced the size of the Fellows cohort for the 2020-2021 School Year, we also reduced the number of Residents. We only plan to hire one new Relay Resident onto our teaching team in the coming year.

Provide data and evidence showing that attendance and engagement has increased since instituting learning pods.

When Great Oaks Charter School was unable to offer in-person learning last academic year due to the COVID-19 pandemic, attendance dropped significantly. Prior to the COVID-19 pandemic, Great Oaks was not a 1:1 school. However, the school quickly transitioned to ensure each student had access to a school-issued Chromebook.

Some of our students continued to experience difficulty engaging in online learning because of circumstances out of their control (e.g., family expectations, inconsistent WiFi). Because of this, many students completely stopped engaging in academic learning. When we partnered with WAVE and the Community Intervention Team in November 2020 to provide in-person learning opportunities during the 20-21SY, Great Oaks staff specifically invited students who had attended less than 10% of their classes this school year.

The attendance records for two students, StudentA and StudentB, have dramatically improved since Great Oaks launched the learning pods. StudentA spent the majority of last year on Homebound due to significant behavior outbursts. She had engaged in at least 3 altercations within the first few months of school. StudentB experiences significant difficulties at home and has been on her own most of her teenage life. Her attendance was often inconsistent prior to COVID. Since being invited to join the pods, both students have shown a complete turnaround.

Even though we are still working on punctuality, both students are present in the building each day. If they are not present, they will notify Great Oaks staff or their pod leader. StudentB has experienced homelessness three times this school year, but will still do her best to catch the bus before school to be present in her pod. Both students have applied for additional opportunities since being in a pod. StudentA is enrolled in a selective after-school program; she participates in weekly conversations and project planning to improve the Wilmington community. StudentB is taking additional credits through Groves to ensure she is on track for graduation. Both students would not be benefiting from these programs if they were not actively committed to attending in-person learning via Great Oaks’ learning pods.

Provide data that shows that the CollegeSpring program has had a positive effect on student academic performance.

We partnered with CollegeSpring this year in an effort to expose our students to SAT material and to ensure that our students know what to expect on test day. Roughly half of all juniors registered for the CollegeSpring after-school program which was hosted 1-2 days/ week by two teachers. Between the 1st and 2nd diagnostic, students increased their scores by an average of 105 points. In looking at improved students only, they averaged 140 points of growth. Additionally, 75% of students who took both practice tests showed gains. After the second diagnostic, 10 students reached or exceeded the benchmark score of 1010.

A plan to complete teacher observations for the rest of this school year.

To ensure the completion of DPAS II for Great Oaks, we have created a system of accountability that meets weekly to review Data Services DPAS II report, and identify action steps. During the review, we identify gaps that need to be addressed, and provide support to assist the evaluator in their completion process. We also partnered with Dr. Debbie Panchisin, DE Charter Network, as an experienced evaluator to assist us with administrative evaluations, and oversight. To prioritize checks and balances in the DPAS II completion process, one of the DASL’s coaches, Dr. Sharon Brittingham, will meet with all evaluators at the end of May to confirm the DPAS II completion of all teachers. Any additional questions or concerns with the DPAS II process will be addressed to Angela Socorso, DDOE.

A breakdown of costs budgeted under “Other Educational Program”, “Contracted Services”, and “Other”.

<u>Other Educational Programs:</u>	
Back to Basics	\$178,000
Special Placements	\$ 37,500
Learning Pods	\$ 95,000
Student Recruitment	\$ 25,000
Personal Wellness	\$ 30,000
Springboard	\$ 23,750
Edmentum	\$ 12,000
Online learning items	<u>\$ 38,350</u>
TOTAL	\$439,600

Contracted Services:

Substitutes	\$ 20,000
Tutor Fees	<u>\$122,010</u>
TOTAL	\$142,010

Other:

Tutor Expenses	\$81,208
Tuition Reimbursement	\$ 1,160
Dues & Fees	\$23,315
Drivers Ed	\$ 4,000
Miscellaneous	<u>\$15,300</u>
TOTAL	\$124,983

Confirmation that the annual audit is included under the “Other” section in the “Administrative Operations” category.

Yes, the audit fee is included in the Administrative Operations – Other along with Legal and other consultants.

Provide additional information under the non-profit grants and donations, including confirmation of confirmed amounts versus anticipated amounts, any restrictions placed on the use of each funding strand and any impact on the school’s finances should the funding not materialize.

The outstanding items under grants and donations are as follows:

- Math Coach Initiative which will be processed by IV by OMB.
- CSP grant through Great Oaks Foundation – the budgeted amount remaining is \$113,295. The school is working with the Foundation to secure these funds in a timely fashion, but it is possible that the receipt may occur in the next fiscal year. There are no restrictions on the funds as it is a reimbursement of funds already spent.

Information on teacher retention rate, over time.

From the 2018-2019 school year to 2019-2020 we retained 77% of our teachers. Between 2019-2020 and 2020-2021 we retained 67% of our teachers. We expect the retention rate to remain in a similar trajectory for the coming school year. Part of the reason for teacher attrition is related to our partnership with Teach for America, where 2-3 of our team members have completed their two year and either move on to pursue non-teaching career goals or move out of state to their hometowns to continue teaching. Reduction in student enrollment has prompted us to realign the number of teachers we employ on our staff.

Information on student retention rate over the last five years.

It is important to note to the Charter School Accountability Committee that as of 07/01/2020, our Great Oaks Wilmington Charter Board voted to change our management from Great Oaks Foundation based out of New York to complete governance and management by our local

Board of Governors who are made up of Delaware stakeholders. This is significant in addressing the unique needs of this school community.

The first three years of Great Oaks Middle School were successful leading to an immediate expansion to a high school. However, the needs of the new student population changed more quickly than the school, given its management challenges with the Foundation, could adjust to meet. As a result enrollment began to decline.

Our strategic plan of action to address enrollment began with our Leadership team who rolled up our sleeves last July through a pandemic and many internal adult professional challenges. We focused on two main components this year: customer service and professionalism to impact our culture. We are determined to improve the narrative of our school community.

We are committed to using our current resources to set high rigorous standards for students learning through intense professional development and support of our educators to assure skilled teachers, expand learning options, assess students in a manner to assist teachers, and intervene in time to improve poor performance. As an outcome, enrollment will increase.

A plan for being financially viable even with low enrollment numbers including:

- **In the short term, how will the school ensure their financial viability with limited state per pupil funding?**
- **Over time, how sustainable will that approach be? What needs to be done to ensure the school's future financial stability?**

Since state funding is based on the number and unit classification of students, lower enrollment does not imply "limited state per pupil funding". While the total revenue does decline with enrollment, the per pupil amounts do not decline.

A primary consideration of the modification request is financial viability through consolidation of resources in the high school grades, as opposed to spreading/duplicating resources across grades 6-12.

During the budget and hiring process each Spring the Great Oaks staff projects enrollment and determines the units and funding that will result. Based on the Delaware funding model, it is important to remain within the allowable units provided by the State. In addition, federal grants fund additional positions. It is important for the school to continually look ahead at projecting future years to manage its cash flow. The school may decide to use one-time funds (e.g., ESSER) to staff foundational, temporary positions.

Great Oaks has been very successful at receiving additional grants outside of the Consolidated Grant funding through DEDOE. Examples are Educator Prep Partners, Math Coach Initiative, 21st Century Learning, DCF/HighMark, and Longwood Foundation. The school is continuing this practice (e.g., ESSER, RPL) with good results.

One of the keys to success in financial viability is to foster a partnership in the budget preparation and monitoring and cash flow management between Operations, Academics, and Finance. Under the previous management by the Great Oaks Foundation, there was a disconnect between the budget process and management and the staff at the school. In the last year, this disconnect has been repaired and there is collaboration and transparency for all

fiscal matters (including bi-weekly reviews with Brook Hughes throughout the year.) The result is greater awareness of the importance of following the budget plan and making adjustments during the year when needed and viable.

In summary, budget development and monitoring include all stakeholders and resource allocation is determined through data analysis and collaboration.

Great Oaks is taking numerous approaches to ensure financial viability.

1. As an evidence-based solution to address learning loss, Great Oaks will lean in to its tutoring model and enhance the program. The school will use some ESSER funding to cover these existing costs.
2. Great Oaks will continue to robustly partner with the Community Education Building to help secure benefactor funding, identify promising grant opportunities, and relentlessly find operational efficiencies in the areas of facilities, food services, and transportation.
3. Great Oaks will seek to continue its partnership with the State's AmeriCorps program and recruit approximately one dozen members to serve at the school in strategic capacities. AmeriCorps members serve at virtually no cost to the school, so this is an exceptional method to provide school and student support while maintaining viability.
4. Great Oaks' older scholars (11th/12th graders) have shown interest in DART passes. The school will analyze the costs/benefits of offering DART passes to certain scholars while optimizing the number of buses.
5. Great Oaks Charter School-Wilmington will continue to partner with the Great Oaks Foundation to identify multi-year grant opportunities for the school, to obtain high-quality and "free" professional development from the Foundation, and to receive donations/gifts for the school.
6. Great Oaks plans to partner with local high schools to provide high-quality, low-cost options for the scholars. Preliminary conversations with William Penn High School have been initiated with the intent of pooling resources to help every rising senior succeed. High-level conversations have occurred with local charter high schools to "share seats" (virtual or in-person) in certain classrooms between schools; this will increase course options for scholars without increasing the number of teachers.

In terms of financial awareness and transparency, Great Oaks has made significant strides. The school has a financial consultant who serves as an independent set of eyes to review monthly numbers and reports. The Great Oaks Board reviews detailed financials each month, that include monthly updates in year-end forecast; this is above and beyond the required communications. Great Oaks adopted a PCard this year to increase transparency and accountability; PCard reports are shared with the Board and the CBOC each month. Additionally, Great Oaks leadership meets with the Charter School Office every other week to review financials and other matters.

Great Oaks is conservative with its financials and intentionally lives within its means. In November 2020, school leadership put plans in place to decrease the number of school staff based upon student enrollment and worked with the CEB to optimize costs associated with the lease. These actions were based upon viability.

A plan to address student attrition due to transportation reasons.

Great Oaks has instituted an accountability tracker with its transportation vendor to continuously improve service to students. The school has also taken a more hands-on stance in the design of bus routes to ensure that students do not spend undue time sitting on a bus each morning and afternoon. As noted above, we will also be utilizing the ability to provide annual student DART bus passes. We believe that this practice of providing not only transportation to and from school, but the opportunity for transportation for many other aspects of life, will be an incredible benefit and incentive for our students to remain with us.

Information on the school's plan to use any of its cash reserves to pay for costs associated with the modification. What are the school's targeted financial reserve levels during the transition period and thereafter.

There are no plans to utilize cash reserves for the modification. There are no direct expenses associated with the modification, and the school strives not to deficit spend in the future years. At a minimum, the school will maintain funding to meet the accrued/summer payroll.