



# **Oakland Unified School District**

## **Charter School Renewal Site Visit Report**

### **Monarch Academy**

**1445 101st Avenue  
Oakland, California 94603**

**Principal: Tatiana Epanchin**

**Dates of review: October 15 - 16, 2008**

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## Part 1: The School Context

### Information about the school

Monarch Academy is a kindergarten through grade 5 public charter school currently in its eighth year of operations. Founded in 2000, Monarch is the third charter school established by the Aspire Public Schools Charter Management Organization (CMO), and the first one established in Oakland by the CMO.

The school's enrollment is at 355 students, the majority (89%) are Hispanic/Latino while 10% are African-American, and 1% Pacific Islander. Almost 88% of the student population is designated as socio-economically disadvantaged, and 78% are designated English Learners (EL). Seven percent (7%) of the students at the school are designated with disabilities. Ninety-three percent (93%) of students are entitled to a free or subsidized lunch, which is a higher percentage than the district average. The student attendance rate Monarch averages at 96%. Monarch has gained a strong reputation in the community with an overall waitlist of approximately 600 students.

From the period 2005 to 2007, Monarch Academy's Academic Performance Index (API) growth has ranged between +26 and +85 points per year. However, the school's API dipped from 791 to 776 points in 2008. In 2007, the school achieved a statewide ranking of 6 and 10 among similar schools.

## Part 2: Overview

### School Strengths:

- The principal effectively implements the Aspire CMO mission and educational model by modeling high expectations and making effective management decisions for the primary purpose of raising student achievement.
- The school's assessment systems provide a range of data to drive and inform instruction.
- The school schedule provides teachers with ample time for planning and discussion of student performance. This results in a strong sense of collaboration and collegiality.
- The CMO and school actively engage the authorizer in monitoring the school's improvement strategies.
- Most staff and student embrace the C.A.R.E.S and Responsive Classroom principles and acknowledge that it creates a well-ordered environment conducive to learning.
- Relationships among students and the school staff are very good.
- Students are keen to come to school; their behavior and attendance are very good; and at the intermediate level, students demonstrate a high level of independence, responsibility and self-reflection.
- Most teachers are receptive to the numerous professional development opportunities available within the school.
- The school grounds and facilities are clean, safe, and well maintained.
- Parents appreciate the open and welcoming environment the school offers and the attention given to their children.

### School Challenges:

- There is inconsistency in teachers' questioning skills, use of time, pace and rigor.
- There is a lack of a broad-based science curriculum in upper grades.
- The Advisory School Council is not currently operational as outlined in the petition.
- High staff turnover impacts the consistency in building staff leadership and instructional capacity.

## **Part 3: Main Findings**

### **Overall Evaluation: The school's overall performance**

**This is a proficient school with excellent features overall.**

### **Is the School An Academic Success?**

Monarch Academy maintains high academic and behavioral expectations for its students, and most of its students reach these expectations. Students in the primary grade-levels (kindergarten through grade 2) are making good progress on meeting school-wide goals while most of the students in the intermediate grade levels (grades 3 through 5) have proficient achievement in mathematics and with some progress in English language arts (ELA). The school is developing strategies to support students particularly in writing as a number of students have not achieved above basic levels in comparison to state and similar school averages.

From the period 2005 to 2007, Monarch Academy's Academic Performance Index (API) growth has ranged between + 26 and +85 points per year. However, the school's 2008 API dipped from 791 to 776 points as a significantly high number of English learners (EL) not achieving ELA proficiency. In the 2008 CST ELA tests, 37% of students achieved proficient or above compared to 76% in mathematics. Sixteen percent of grade 5 students achieved proficient, or above, in the 2008 CST science tests.

Monarch Academy implements a rigorous, standards-based curriculum, although the science curriculum is not as strong as other core subjects. The quality of instruction varies from class to class and some of this variance can be attributed to the significant staff turnover. Yet, in the best practice, there are good opportunities for students to improve their learning and to think critically. There are good support structures, which include after-school tutoring and a summer bridging program in place to prepare and help students improve their learning. The school provides a well-structured physical education program, dance, and music in addition to the core academic subjects.

Monarch Academy's culture is underpinned by its focus on college readiness, including goals for students in their early stages of learning. The school has a 96% attendance rate which is above similar and Oakland Unified School District schools.

### **Is the School an Effective, Viable Organization?**

Organizational management at Monarch Academy is very effective, so that the school functions efficiently on a day-to-day basis. The principal provides strong leadership and is supported well by the school's leadership team. Together, they successfully focus on improving the quality of the school's work, with particular focus on student achievement and the quality of their classroom experiences. Parents and staff support the decisions and changes made by the school leadership and CMO. They appreciate the fact that the principal is a very good communicator and is very approachable.

Monarch Academy's fiscal and operational health is helping to ensure all students are served well. The school's finances are strong and healthy, as evidenced by the previous two years of clean, unqualified audits. There is a good level of financial expertise on the CMO governing board. The CMO provides expertise in school finance and has systematized many aspects of the financial operations to run efficiently with minimal staff.

### **Has the School Remained Faithful to the Terms of Its Charter?**

The school meets the terms of its charter in all areas relating to student achievement, its curriculum delivery, and fiscal accountability. CMO board governance of the school is also effective, with the expected policies and practice securely in place. However, some change in the composition of the

Advisory School Council is necessary to guarantee effective practice with respect to school's charter alignment.

In alignment with the Aspire charter petition, Monarch Academy maintains a safe and secure environment, which is supportive and enables learning. Expectations of student progress are becoming more consistently high and the curriculum and extra-curricular opportunities provide many avenues for students with diverse interests and needs to progress in their learning.

There is alignment in charter petition to the school's implementation of the Aspire differentiated instructional model by using grouped centers and varied learning activities to deliver a standards-based curriculum. However, for a few teachers, instruction lacks consistently effective practice in a few classes. Implementing consistent, strong classroom management and center activities that tap into higher order thinking skills are areas which require fuller examination and strategic development.

As outlined in the charter petition, the school leadership analyzes student assessment data and provides regularly scheduled time for teachers to discuss and analyze this data. Teachers plan lessons collaboratively and use data in this planning. However, there is much variance in how effectively teachers' use of a range of data to inform and differentiate lessons to meet all students' needs fully. Students are assessed constantly through individual teacher assessments, Aspire-wide benchmark assessments, the school's own assessments, and by the state standardized tests. In meeting the school's agreed goals, there are good structures for collaboration and planning.

### **Criterion 1: Improving Student Achievement**

*A charter school promotes student learning through a clear vision and high expectations. It achieves clear, measurable program goals and student learning objectives, including meeting its stated performance standards, state and federal performance standards, and closing achievement gaps of students.*

#### **This area of the school's work is proficient.**

Monarch Academy implements clear and measurable program goals and student learning objectives, including meeting its stated performance standards. The school has made good API growth in past years, but dipped from 791 to 776 in 2008. The school did not meet its 2008 API growth target for Hispanic, special education, and socio-economic disadvantaged subgroups.

Children in kindergarten make good progress in learning to read, write, and count. Although many reach expected goals by the time they start grade 1, a significant number have still to do so, especially in aspects of English language learners (ELL) developing literacy skills. Results for 2008 in both grades 3 and 5 in mathematics are in line with State averages and above district average. However, the majority of students tested performed mainly at basic to below basic in ELA. Few students in grade 5 (16%) met this year's state averages or above in science. State tests indicate that students do not perform well in writing. Students who have learning or other needs receive prompt and sensitive help and as a result achieve well. The school has responded quickly to the needs of special education students. These students are given good support, make good progress, and achieve well. There is a whole school focus on expository writing and the improvements needed for students at all grade levels to improve their writing skills.

With high staff turnover, the school faces the challenge of ensuring that all teachers maintain high expectations. The teachers are supported by the leadership team, through intense professional development and by standards-based literacy and numeracy resources, including technology to demonstrate their lessons and to enhance students' learning. With the exception of science, the school's curriculum clearly identifies essential skills and knowledge to move students' learning forward with rigor and good pacing. The core curriculum is structured in a coherent grad-by-grade sequence, scaffolding language and mathematics skills with assessment effectively implemented to support students' mastery across all subjects.

The school has put in place effective strategies to meet the full range of abilities and needs of students, including those students who are English language learners, those with special educational needs, and high achievers. As shown in academic results, the school is effectively closing the achievement gap for most students. For those students who fall behind or require support, the school implements effective strategies to address their needs, such as targeted reading

groups and support of assistants or volunteers. Technology is used well to enhance student learning. Students show a high level of enthusiasm for their learning across the curriculum, reflected in their positive responses in lessons, participation in after-school programs, and their diligent efforts to learn more and to do well.

The school has ample space conducive to learning with welcoming and well-resourced classrooms. There is good maintenance of the school site with watchful security ensuring the safety of students, including rigorous emergency procedures and crisis plans. There is mutual respect and trust among adults and students. There are no issues of violence or bullying among students who demonstrate good citizenship to exemplify the whole school C.A.R.E.S (cooperation, assertiveness, responsibility, empathy and self-control) principles. The school makes a concerted effort to address the healthy eating and well-being of the students. Policies are effectively implemented to sustain students taking responsibility for their behavior.

The school leader and staff clearly articulate the school's mission of raising student achievement in daily practice. The school had developed effective systems for ensuring that all stakeholders receive consistent and clear communication on a regular basis through frequent newsletters, workshops, and events to draw parents into the life of the school. Parents and students are clear that the school expects its students to be prepared for and to go to college. Parents praise the availability of teachers and the principal regarding their attention to their children's needs.

While the school's vision and mission are clearly communicated to all stakeholders, the school leadership recognizes the need for parents to be more active as part of the school's support system. Few parents actively engage in the daily life of the school or play an explicit role in monitoring and using assessment data relating to their own children's progress and achievement. The principal has put greater focus on formal monitoring and evaluation of the school's programs, especially in the review of the school improvement plans, in observations of teaching and learning, and in the teachers' use of disaggregated data to better inform classroom practice.

## **Criterion 2: Strong Leadership**

*The leaders of a charter school are stewards of the charter's mission and vision and carry out their duties in a professional, responsible and ethical manner. Charter school leaders use their influence and authority for the primary purpose of achieving student success.*

### **This area of the school's work is proficient with excellent features.**

The school leadership fosters learning, a strong community and positive behaviors. The school facility is organized and structured so that it is safe, orderly space where students are the priority. The principal adheres to high standards for academic achievement and behavior and utilizes systems of "non-negotiables" which drives the culture to positively impact on learning. The school has worked extensively and with success in developing positive student behavior through the responsive classroom model. In turn, students know what is expected of them. The school's C.A.R.E.S. motto is evident in all areas of the school with a signed commitment from students to live by the C.A.R.E.S (Cooperation, Assertiveness, Responsibility, Empathy and Self Control) lifestyle. Students have a real working knowledge of the motto and know how it is manifested daily in their behavior. When working together, the various aspects of C.A.R.E.S help students to assist each other and problem solve collaboratively. Students, staff and parents are proud of the school. Students discussed the importance of community within the school and the independence fostered. However, the opportunities provided for students to demonstrate the C.A.R.E.S principles from class to class are varied.

The school establishes and maintains regular teacher collaboration. Teachers understand, and for the most part adhere to, the high expectation set by the school principal. Teachers also meet often to discuss student achievement, school events and data analysis. To increase instructional effectiveness and consistency of expectations helped by the weekly professional development, peer observations, and through shared strategies. The teachers express that they are given a degree of flexibility within the established Aspire model and value the opportunities to work together in teams.

The principal expresses concern about staff turnover which has been detrimental to the school maintaining a stable teaching force and expertise needed, especially in addressing the needs of

English language learners. However, contingency plans are in place to ensure that students receive comprehensive and coherent learning opportunities with supporting after-school programs to address the learning needs of all students. The Aspire CMO does not implement exit interviews for departing staff or make recruiting strategies explicit.

There is respect for the diversity and needs of the staff, students, parents, and community. The school has little student attrition. Yet there is limited celebration of the school's ethnic diversity and cultural sensitivity to raise student, staff, and parent awareness of the school as part of a global community as evident in the lack of cultural diversity in class libraries' reading material and explicit displays, posters, and information in Spanish or other ethnic representations. Recruitment plans focus on inclusive principles to attract a diverse and range of learners to the school. The school has clear and open enrollment procedures, with an adopted public lottery policy.

The school is beginning to productively engage a greater number of the community members and partners as part of the school's support system, as exemplified by the effective contributions of volunteers who regularly come into school to support students' academic and social skills. This is making an impact on raising students' interest in books and in improving their reading skills.

### **Criterion 3: A Focus on Continuous Improvement**

*A charter school engages in a process of continuous self-improvement in order to increase the effectiveness of its educational program. The school regularly assesses and evaluates student learning based on stated goals..*

#### **This area of the school's work is proficient with excellent features.**

The teachers at Monarch Academy use a variety of student assessments, which include their own classroom assessments, Aspire-wide benchmark assessments, school interim assessments, and the state standardized tests to assess how their students are achieving. The results of these assessments are collected regularly; and formal, structured time is set aside for grade-level teachers to review student achievement data and to discuss lessons. In most cases, adjustments to the teachers' planning are made based on the information collected. Teachers report that the data analysis has been helpful and that the collaborative planning has been effective in planning learning activities and in providing consistency across each grade-level. Teachers also share the results of student achievement data with parents at conferences.

Teachers regularly review how they assess students and collect data to understand the performance levels of their students. Rubrics are consistently broken down into the distinct skills to help teachers understand the levels of students work while teachers are working to improve how this is communicated to students who currently are not always clear as to what skills they need to develop and the steps they need to take in their next stages of learning. They are developing the instructional strategies they need to improve student performance. However, some assessments do not directly link back to the state standards. For example, reading tests delineate the proficiency levels of their students on the mechanics of reading; but not necessarily on their reading comprehension levels – particularly for the EL students.

The school has formal systems for reviewing data and for developing short and long-term plans. For example, the teachers regularly engage in a "cycle of inquiry" discussions in which the school teaching community pull out trends and evidence in student achievement overall. Specific instructional strategies or skills focus areas are then developed and applied within and across grade-levels based on this examination.

The Aspire CMO provides the school with a comprehensive summary of its annual state STAR data, outlining trends and disaggregated significant subgroup performance. The school principal shares analysis of this information with the teachers. There are good systems implemented for the management of student information and assessment data. The school administers the mandated State tests and carries out its own interim assessments. Instruction is data driven, with modifications made in response to student performance.

Teachers know their students well, and lessons are pitched at the correct levels to help students progress at a rate comparable to their abilities. Teachers group their students based on their prior knowledge and understanding with good opportunities to differentiate group tasks to address students' varied needs. Teachers regularly confer to track students' progress through subject

content and skill-based assessment. As needs arise, students receive additional support in areas where improvement is needed, and teachers adapt their approaches to address individual needs. In addition, grouping is very deliberate and facilitates intense focus on areas that need improvement.

#### **Criterion 4: Responsible Governance**

*A charter school board and administration establish and implement policies that are transparent and focused on student achievement. Charter school board members and administrators have a cogent understanding of and comply with the laws that govern charter schools.*

##### **This area of the school's work is proficient.**

The Aspire CMO governance of the school is aware of the school's needs and effectively carries out data analysis and monitoring of CST and interim assessment of students' academic results. The Board identifies key priorities and primarily liaises with the CMO management team in providing a clear mission for the Aspire schools. Board members' visits to the school-site are variable, and dependent on each member's available time. There are clearly defined complaint and conflict resolution procedures which are documented and accessible. There are adopted set of bylaws which include policies for meeting protocols, procedures, and formal financial systems within the school. Policies and procedures have been developed and duly adhered to, as noted in board minutes. The Aspire CMO thoroughly monitors the likelihood of any board members' conflict of interest.

The school leadership works close with the Aspire CMO to ensure that information and professional development opportunities are provided relating to charter operations and laws. However, the school-site governance is less rigorous. The school does not have an operational on-site Advisory School Council to meet the requirements of the charter petition, lacking representation of parents and members of the community on in its committees.

The Board receives monthly fiscal reports and CMO updates. There are sound legal and financial structures delineated in the CMO to ensure that the Board effectively carries out its duties. The budget is adopted according to the district requirements and interim reports created in a timely manner. However, the Board does not receive regular Monarch updates regarding the school's strategic plans and actions. Thus, there are well-defined means of evaluating the effectiveness of the school's improvement strategies and progress made in addressing identified priorities, such as the school's proposed curriculum changes in its forthcoming new petition.

#### **Criterion 5: Fiscal Accountability**

*A charter school fulfils its fiduciary responsibility for public funds and maintains publicly accessible fiscal records. The school conducts an annual financial audit which is made public.*

##### **This area of the school's work is excellent.**

The principal's on-site operational management and CMO's financial overview of the school is very good and the finances are secure. The school is in full compliance with financial reporting and management. The school has maintained yearly positive balance sheets, a 7% reserve, long range budget projections, and grant development which demonstrate its financial viability. The principal receives updates and timely budgetary information and demonstrates her involvement in monitoring the working budget accordingly. Such careful scrutiny allows the school to support student learning through funding ample classroom resources and academic staffing support.

Ongoing financial management practices are comprehensive and transparent. Good communication ensures the school's fiscal integrity and sustainability. The school supports an environment conducive to student learning by maintaining a spacious and accommodating facility. This allows for the flexible use of space for varied student groupings. The budget is well-managed to provide necessary classroom resources and supplies within a clean and safe school site. There has been effective budget spending to employ teacher aides in most classrooms. Recognizing the need for

the strategic allocation of resources, the principal carefully aligns the budget with its explicit educational goals.

The CMO provides the principal with a comprehensive set of fiscal policies governing the fiduciary responsibilities within the school. In turn, the school aligns its mission and vision with fiscal policies and procedures. The establishment of an Advisory School Council is yet to be formalized to help the school align its governance to its charter petition and in creating its vision for strong ties to families and the community. As a result, there is a lack of stakeholders' input, such as parent representatives from the Advisory School Council, in the budget planning and review process.

Internal controls are deeply embedded in the school's financial systems and procedures. The addition of dual signatory on checks and signed bookkeeping of petty cash are needed to enhance financial controls.

Communication is maintained with the authorizers and district policies. Regardless of where the Aspire documents reside, it is clear that internal controls are deeply embedded in the principal's understanding of fiscal matters. Annual audits are available and transparent for OUSD and the public to be aware of the school's financial status. The most recent audit indicates that the school is in compliance with all of the district's required documentation demonstrating the leadership's strong commitment to ensuring that finances support the drive to achieve the school's mission and goals.

# School name: Monarch Academy

School Quality Review	5	4	3	2	1
Overall evaluation score		X			

Criterion 1: Improving Student Achievement: A charter school promotes student learning through a clear vision and high expectations. It achieves clear, measurable program goals and student learning objectives, including meeting its stated performance standards, state and federal performance standards, and closing achievement gaps of students.		5	4	3	2	1
Criterion 1 overall score:			X			
1.1	Achieves clear, measurable program goals and student learning objectives, including meeting its stated performance standards, and state and federal standards		X			
1.2	Achieves comparably improved student learning outcomes relative to students in traditional public schools that students would have otherwise attended	X				
1.3	Demonstrates high expectations for student achievement	X				
1.4	Provides a challenging and coherent curriculum for each individual student		X			
1.5	Implements and directs learning experiences (consistent with the school's purpose and charter) that actively engage students	X				
1.6	Allocates appropriate resources in the way of instructional materials, staffing and facilities to promote high levels of student achievement		X			
1.7	Promotes academic risk taking by supporting students in a safe, healthy and nurturing environment characterized by trust, caring and professionalism		X			
1.8	Productively engages parental and community involvement as a part of the school's student support system		X			
1.9	Shares its vision among the school community and demonstrates its mission in daily action and practice		X			
1.10	Involves staff, students, parents and other stakeholders in its accountability for student learning and in the school's program evaluation process			X		
Criterion 2: Strong Leadership: The leaders of a charter school are stewards of the charter's mission and vision and carry out their duties in a professional, responsible and ethical manner. Charter school leaders use their influence and authority for the primary purpose of achieving student success.		5	4	3	2	1
Criterion 2 overall score:			X			
2.1	Effectively communicates and engages stakeholders in the vision mission of the school		X			
2.2	Consistently puts into practice the educational program outlined in its charter.		X			
2.3	Generates and sustains a school culture conducive to staff professional growth	X				
2.4	Actively monitors and evaluates the success of the school's program	X				
2.5	Provides regular, public reports on the school's progress towards achieving its goals to the school community and to the school's authorizer	X				
2.6	Treats all individuals with fairness, dignity and respect		X			
2.7	Has a cogent understanding of the laws that govern charter schools and monitors the trends, issues and potential changes in the environment in which charter schools operate		X			
2.8	Makes management decisions and uses his/her influence and authority for the primary purpose of achieving student success		X			
2.9	Abstains from any decision involving a potential or actual conflict of interests	X				
2.10	Respects diversity and implements practices that are inclusive of all types of learners consistent with the school charter		X			
2.11	Engages community involvement in the school		X			

<b>Criterion 3: A Focus on Continuous Improvement: A charter school engages in a process of continuous self-improvement in order to increase the effectiveness of its educational program. The school regularly assesses and evaluates student learning based on stated goals.</b>		<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
<b>Criterion 3 overall score:</b>			<b>X</b>			
3.1	Uses information sources, data collection and data analysis strategies for self-examination and improvement.		X			
3.2	Establishes benchmarks and a variety of accountability tools for monitoring student progress and uses the results of these assessments to improve curriculum and instruction	X				
3.3	Establishes both long and short term goals and plans for accomplishing the school's mission as stated in its charter.	X				
3.4	Uses student assessment results to improve curriculum and instruction.		X			
3.5	Uses the results of evaluation and assessment as the basis for the allocation of resources for programmatic improvement.		X			

<b>Criterion 4: Responsible Governance: A charter school board and administration establish and implement policies that are transparent and focused on student achievement. Charter school board members and administrators have a cogent understanding of and comply with the laws that govern charter schools.</b>		<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
<b>Criterion 4 overall score:</b>			<b>X</b>			
4.1	Ensure that policies are implemented in a fair and consistent manner.		X			
4.2	Monitor the trends, issues and potential changes in the environment in which charter schools operate.		X			
4.3	Seek input from impacted stakeholders.		X			
4.4	Enact policies that respect diversity and implements practices that are inclusive of all types of learners consistent with the school charter.		X			
4.5	Actively engage the school's authorizer in monitoring the school's educational program and its fiscal status.		X			
<b>Criterion 5: Fiscal Accountability: A charter school fulfils its fiduciary responsibility for public funds and maintains publicly accessible fiscal records. The school conducts an annual financial audit which is made public.</b>		<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
<b>Criterion 5 overall score:</b>		<b>X</b>				
5.1	Creates and monitors immediate and long-range financial plans to effectively implement the school's educational program and ensure financial stability.	X				
5.2	Conducts an annual financial audit which is made public.	X				
5.3	Establishes clear fiscal policies to ensure that public funds are used appropriately and wisely.	X				
5.4	Ensures financial resources are directly related to the school's purpose: student achievement of learning goals.	X				