

Report on Feasibility Study

Prepared
for

Education Committee
Lake Wales Area Chamber of Commerce

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Lake Wales Collegiate School System, Inc.

Innovation . Choice . Achievement

TABLE OF CONTENTS

	<u>Page</u>
Preface to Report	iii
Map of Florida’s Charter Schools	iv
Introduction	1
I. BACKGROUND: THE DECLINE OF LAKE WALES SCHOOLS	1
A. History of Good Schools	1
B. Objective Measures of Decline	1
C. Adverse Economic Impact	2
D. Community Feels Powerless	3
II. COMMUNITY STRENGTHS	3
III. PURPOSE OF STUDY	4
IV. STUDY METHOD	5
V. RESULTS	5
A. Community Consensus	6
B. Leadership	6
C. Teaching is the Key	7
D. Curriculum: The Lake Wales Demographic	8
E. The Basics	8
F. Career Paths	9
G. Inevitability of Adulthood	10
H. Arts and Music	10
I. More than High School	11

	<u>Page</u>
VI. RECOMMENDATIONS	11
A. Responsibility: Local Governance	11
B. Innovation: The College Component	11
C. Choice: Career Paths	12
D. Student Achievement: Measurable Outcomes	12
E. Private Financial Support	13
VII. BRIDGES TO CROSS	13
A. Funding	13
B. Financial Analysis	13
C. The Veteran Teacher	14
D. Good Communication and Full Disclosure	15
E. School Board and District Staff	15
VIII. IMPLEMENTATION	16
IX. PROGRESS TO DATE	18

PREFACE TO REPORT

On January 15, 2003, the Lake Wales Area Chamber of Commerce, operating through the Florida not-for-profit corporation known as Lake Wales Collegiate School System, Inc., released an Interim Report on a feasibility study being conducted with regard to Lake Wales area schools. The report was sent to all those interviewed, as well as a number of individuals in the community who had been identified during the course of the interviews. The recipients were asked for their suggestions as to how the final report should be changed or improved.

The suggestions for amendments and corrections have been gratefully received and have resulted in substantial improvement to the final product. This Final Report could not have been made without the dedication and commitment of all the Lake Wales citizens who are so vitally interested in improving the quality of schools in the community.

This Final Report replaces the Interim Report.

Respectfully submitted,

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INTRODUCTION

Members of the Lake Wales community contend that the quality of Lake Wales area schools has been declining. If so, the Lake Wales Area Chamber of Commerce is concerned about the negative effect on students and their families, as well the community's quality of life and the local economy. The Chamber commissioned Robin Gibson to assess the status of the eight Lake Wales area schools (Babson Park Elementary, Hillcrest Elementary, Janie Howard Wilson Elementary, Polk Avenue Elementary, Spook Hill Elementary, McLaughlin Middle School, Roosevelt Academy, and Lake Wales High School) and conduct a feasibility study concerning possible methods for improvement. This is the report of the results of that study.

I. BACKGROUND: THE DECLINE OF LAKE WALES SCHOOLS

A. History of Good Schools

Lake Wales has been a stable community where a number of families have existed for generations. The great-grandparent and grandparent generations attended schools in the 1930s and 1940s when Lake Wales had its own school district. The community valued education highly and voted to tax itself to finance the construction of facilities and provide the means for a quality school system. In 1947, all the city school districts were consolidated into one county school district. Succeeding generations in Lake Wales continued to benefit from the facilities that had been constructed by the local district. In all, the area enjoyed good success with its efforts to maintain its tradition for quality.

During the desegregation era of the 1960s and 1970s, Lake Wales schools – clustered closely together – were fully desegregated. Lake Wales has one of the longest experiences in the county with full desegregation. City commissioners, community leaders, school administrators, and coaches of athletic teams have been positive influences. The community has moved from a time of tension and unrest to the good race relations prevailing today. As stated by a retired teacher: “We found that the likenesses outweigh the differences.”

Lake Wales has historically relied on its own public schools to educate its children. Private schools have never been much of a factor. A strong Catholic school closed its doors approximately 25 years ago. A K-12 Christian school opened during desegregation times. It closed its doors about 20 years ago. From the beginning through the 1980s, most Lake Wales families were content to enroll their students in Lake Wales schools.

B. Objective Measures of Decline

Babson Park Elementary School has always been a barometer for the quality of Lake Wales schools. The community is located between Lake Wales and Frostproof. Babson Park families can choose to continue their children's education by going north to Lake Wales, south to Frostproof, or to private schools. The principal reports that years ago, virtually all of the Babson Park graduates opted to go north to Lake Wales schools, mainly because "most of our families liked what the high school offered, especially the band." Today he reports that "most of our kids go to Frostproof." Those families who can afford private schooling have enrolled their children in All Saints Academy. One family enrolled their children in private schools in Tampa.

While Lake Wales schools fully desegregated years ago, schools in Bartow and Winter Haven did not. In order to achieve racial balance, the District allocated greater resources to create superior magnet schools for these towns. The magnetic pull has convinced a number of families to leave Lake Wales schools and enroll their children in these out of town schools. Other families have even left town entirely and moved their homes to these communities. At least one of these families – after their children graduated from a preferred high school – moved back to Lake Wales.

The International Baccalaureate program in Bartow has attracted some of Lake Wales' top students. The Harrison School of the Arts in Lakeland has attracted other top students, particularly musicians who would have been available to further the Lake Wales tradition for top concert and marching bands. The result has been to fragment the community. The families that have been drawn away are just as distressed about the lack of advantages in Lake Wales as are the families that have been left behind.

FCAT scores for Lake Wales schools have not been favorable. Parents report a reluctance to enroll their children in a school that has been officially branded as mediocre or failing.

All this has resulted in a downward spiral: the community perceives a decline, concerned parents enroll their students elsewhere, the schools lose concerned parents and good students, the defections fuel the community's perception of further decline – and the whole spiral continues. This means that the students who remain are being educated in typical East Area schools without the advantages existing in the private schools and superior public schools.

Educators contend that the quality of education offered by Lake Wales schools is better than the community's perception. While there has been considerable concern about the plight of Lake Wales students, very little recognition has been given to the loyal core of talented educators who have been called upon to compete with the rest of the county on a playing field that is not level.

C. Adverse Economic Impact

Community and business leaders are alarmed because of the negative effect that the decline of Lake Wales schools is having on the local economy. Real estate brokers report lost residential sales because families do not want to enroll their children in Lake Wales Schools.

Those in residential construction and finance report that a big part of where parents decide to live is determined by the quality of the schooling available for their children. The areas served by good schools are more desirable, causing property values to increase. Property values suffer in areas containing what are perceived to be mediocre or poor schools. City officials are concerned about school quality because they know that the city's tax base depends on property values.

The City of Lake Wales has made a substantial investment in the new 165-acre Longleaf Business Park. The park is designed to contain over 20 structures with an average size of 50,000 square feet that could provide 1,400 new jobs at build out. The success of the business park depends in part upon the willingness of families to come to the area and enroll their children in Lake Wales schools. The professionally-prepared marketing materials that extol the virtues of the area are telling. All of the community's assets are listed. With regard to public schools in Lake Wales, the materials are silent.

D. Community Feels Powerless

Educators feel unfairly rejected by the defections of the families who have left Lake Wales schools. They resent some of the state programs, particularly the "FCAT, which has become the almighty." Educators realize that the school board and the superintendent have been elected by a countywide vote and are resigned to the fact that the political balance of power lies elsewhere. The feeling is that the population centers enjoy greater educational resources and that East Polk is a neglected part of the county. One teacher summed it up this way: "We know the money goes where the votes are."

Parents, with a few courageous and devoted exceptions, are mostly apathetic. They feel that administrators and teachers are locked in by rules and regulations and burdened by excessive paperwork from, as one parent put it, "a monstrous bureaucracy." Some parents have, over the years, tried to represent Lake Wales interests at the district level. They have little to show for their efforts, except discouragement, and now spend their time elsewhere. The prospects for curing the local shortcomings were evaluated by another parent this way: "the thing is too big to fix – Polk County is as large as Rhode Island."

Community leaders are by nature activists and participators. Most have extensive experience with the schools through their own families. They are alarmed at the trends, but at the same time discouraged about further participation. Their experience is that decisions about governance, personnel, curriculum, and programs are all being imposed from elsewhere. "If we had local control, the incentives would be in the right place. If we messed up, we'd hurt our own kids."

II. COMMUNITY STRENGTHS

Lake Wales is a cohesive community. The town is in the corner of the county and hasn't lost its identity because of extensive sprawl. A visitor can tell where it begins and ends. Its separate and more remote location has promoted a measure of self-sufficiency. The community supports its own hospital, newspaper, and businesses. The professional community consists of banking, accounting, law, medicine and its specialties, clergy, architecture, dentistry, veterinary medicine, morticians, optometry and ophthalmology, education and post-secondary education, journalism, engineering, and surveying, among others. Agri-business is a big part of the economy which also includes building and construction, technology, retailing and merchandising and all the trades necessary to fully service the community.

Culture and education are highly valued. Advanced degrees are a hallmark of the community. Two fine institutions of higher learning – Warner Southern College and Webber International University – are integral parts of the community and are staffed with individuals who value education and are themselves highly qualified. The community is inspired by the Historic Bok Sanctuary and supports the Lake Wales Arts Center, Lake Wales Museum & Cultural Center, the Lake Wales Little Theatre, the Lake Wales Chorale, and a number of church-based cultural programs. The high school has had a reputation for outstanding marching and concert bands.

The schools are centrally located. Four elementary schools, a middle school, a special education academy, and the town's high school are all located in a tight cluster within the historic city limits.

The area schools are of manageable size. The enrollment of the eight area public schools – including Babson Park Elementary – is approximately 5,000 students. This is, coincidentally, the size of Broward County's very successful Pembroke Pines charter school system located near Hollywood, Florida.

The city's government consists of concerned city commissioners and a cost-effective city administration. The town's population is less than 12,000. The city is not large enough to support two tiers of administration – where upper management interacts with lower management and lower management interacts with citizens. City administrators are in direct contact with citizens.

The city has a number of assets that could be beneficial to schools. The city library is an excellent resource. The city also maintains a number of athletic fields, facilities, and has renovated several unoccupied historic structures. Some of the structures were originally school buildings.

III. PURPOSE OF STUDY

Lake Wales citizens are convinced the community has the ability and capacity to accomplish what it wishes – provided there is a consensus as to what needs to be accomplished.

As one teacher and community leader said, “If the community is united, there’s the money and the backing to get it done.” Thus, the purpose of this study is to see if such a consensus exists, and if so, to accurately describe that consensus.

The consensus reported upon here is based upon the community’s perception. Some may contend that reality is different from the community’s perception. Such contentions are hardly relevant. In the eyes of the beholder, perception is reality. Members of the community form their opinions and make their decisions for action based on their perception of reality. This report describes the perceptions of those interviewed as reported to the interviewer. Quotation marks have been used to report actual statements.

IV. STUDY METHOD

The study began November 13 and was conducted for more than two months. The method consisted of a series of personal interviews. Thus far, interviews have been conducted with one hundred and fifty-two members of the community most affected by Lake Wales area public schools. All eight principals have been interviewed. To date, interviews have been held with seven of the eight School Advisory Committees and all but three teacher groups from each school. The teacher groups have usually included the last three Teachers of the Year. Most of the individuals in the community who have been most frequently named as having the highest credibility and respect by the educators have also been interviewed.

The interviews consisted of the following three questions:

1. Needs and Goals. What do you feel are the needs of the Lake Wales area schools and what should our goals be in order to meet those needs?
2. Obstacles. If we were to undertake something innovative and different, what do you believe are obstacles that would have to be overcome in order to achieve success?
3. Leadership. Who are the people in the community who are most respected and perceived as having the greatest credibility, so that – if they were involved in the effort for improvement – the community would have confidence in their decisions and direction?

The questions posed were designed to be open questions so that the answers could not be steered or influenced by the interviewer. Those interviewed were asked to speak their minds. The responses to each of the three open questions were then collated, producing a reliable compilation of community consensus to this point. More interviews will be conducted in the future.

V. RESULTS

The most surprising aspect of the study was 1) the level of agreement, and 2) the extent and depth of the constructive thought for improvement. Also significant was the fact that the suggested strategies were essentially the same – whether they came from trained educators or parents and community leaders who are untrained in education matters.

With the open format, not everyone spoke about the same thing. Some covered points not mentioned by others. When the same subject matter was discussed, there was really no disagreement or controversy. The collective opinion of those interviewed was clear.

A. Community Consensus

Seven points were usually addressed by most of those interviewed. Those seven points are listed here as the consensus of the community. After that, there were areas of agreement that were not mentioned as frequently as the seven points. Those areas of agreement will be addressed below. The seven points are:

1. No one is content with the status quo. Lake Wales is considered to be a wonderful place with many attributes, but events have progressed to the point that public education has become the community's Achilles heel.
2. All students, regardless of starting point, should experience gains. Those who elaborate on the subject feel that the pure academic curriculum that has been used for decades is not the way to get there.
3. All Lake Wales area schools should benefit. The community feels it has been burned by superior schools elsewhere. Community enthusiasm for the project falls away if the result were to create one or two elitist schools and leave the others as also-rans.
4. Accept responsibility. Blaming others hasn't worked. The community feels that it has the talent, credentials, and commitment to operate its own schools and to set policies and rules for curriculum, teaching style, personnel, and discipline that would meet the needs of the unique Lake Wales demographic.
5. Ensure all students have the basics – reading, writing and math – especially reading.
6. The curriculum should be more practical and provide real-world educational choices that are relevant to local families and the local economy. A strong academic program should be one of the choices.
7. The effort should result in substantial improvement. In the words of a former city commissioner: "We should provide an education for all Lake Wales area students that is second to

none.” There was no interest in mounting a huge community effort if it only replicated what is already being done by the county school district.

As those interviewed elaborated upon the seven points above, the conversations went into different areas. When the same areas were discussed, however, there was still agreement within the particular area. The elaborations concentrated on 1) the importance of leadership, and 2) how the curriculum could meet the needs of the Lake Wales demographic.

B. Leadership

A great deal of comment was reserved for educational leadership. Parents and teachers in particular mentioned the importance of leadership. “Improvement starts with strong leadership that can communicate vision, goals, and expectations – otherwise teachers will tend to give up

and not keep trying.” As one businessman said, we need “creative and credible people to lead and take us to defined target levels – obtain the best talent level possible.” As explained by an official in the Pembroke Pines Charter School System, “the trick is to delegate responsibility to outstanding principals.”

Concern was expressed because a number of principals and assistant principals in the Lake Wales area are nearing retirement. These principals will be lost and the question turns to the selection of their replacements. Several mentioned the need for principals to live and be involved in the community. A retired principal stated that he learned “more about how to help my students and families by standing in line at the supermarket, being at athletic events, and attending church in the community.” The feeling was that a principal is a very important person in the community and – like it or not – is on duty seven days a week. The more the principal knows about his or her people, the better job the principal is capable of doing at school.

Teachers stressed the importance of having an outstanding principal. Top principals have a way of recruiting, motivating and retaining top teachers. They hold teachers accountable and are willing to give good teachers the maximum latitude for innovation. An exceptional principal can make the school environment fun and exciting.

C. Teaching is the Key

The main purpose of educational leadership is to recruit, motivate and retain the best teachers. Teachers stressed that they are no different than parents and students – they also want an exciting and successful school environment where learning and achievement is paramount. The appreciation that an involved parent has for a good teacher for their child cannot be overstated. Parents realize that “the light gets turned on in the classroom – and the good teacher is the one at the switch.”

“Attracting quality teachers” was mentioned time and again as one of the biggest challenges for the future. Most teachers are proud of what they do and look to school and community leadership to enhance the profession by finding ways to attract quality teachers to the fold. Administrators were concerned about the harsh realities of recruiting. The raw numbers are that there will not be enough graduates from the colleges of education to fill the projected openings for new teachers. Teachers will be in even greater demand as the constitutional mandate for smaller class sizes phases in.

A few teachers cautioned that it might be even more difficult because some new, young graduates may not be attracted to a small town environment.

Local governance would bring with it control over salary and personnel matters. An experienced educator with charter school experience felt that “creative, private sector techniques such as signing bonuses and additional incentive pay could be given while a teacher’s base pay is guaranteed. All bonuses would be based on a positive model instead of being negative or punitive. The possibility of lower pupil teacher ratios, student and teacher technology programs, classroom materials and supplies, teaching environment conducive to optimum learning and strong community support, could be used as attractors.”

D. Curriculum: The Lake Wales Demographic

Everyone – particularly the educators on the front lines – thought that the curriculum should be designed to meet the needs of the demographics of Lake Wales. Lake Wales area students don't fit a statewide mold – or even a countywide mold. The Lake Wales economy is still very dependent on agriculture. Educators feel that community leaders are not fully aware of the number of poverty level, at-risk students enrolled in Lake Wales Area schools. Eighty-three percent of the students at Polk Avenue Elementary, for example, are on free or reduced lunch. Educators are called upon to deal with children of families in crisis. Much of the poverty is generational and the children from these homes have little in the way of mentors or inspirational role models.

Some of the administrators interviewed felt that it was time to stop blaming the home for lack of student achievement and to start accepting responsibility for teaching students as they are. As one principal put it, “Parents send us the best kids they have. They don't keep any at home. If they are the product of drugs, crime, and unemployment, they only mirror the community we serve. They are not separate from the community.”¹

More than 75% of Lake Wales students will not be heading off to a conventional four-year residential university. The majority of students and their families see no relevance or practical benefit in a pure academic curriculum. At the same time, the burning issue with the parents of top academic students – and many of these parents are university educated community leaders – is the failure of Lake Wales schools to provide a challenging curriculum for university preparation. The trick is to design a curriculum that meets the needs of the Lake Wales demographic profile and complies with the community's emphatic requirement that “all children be moved forward.”

An experienced educator felt that “Curriculum development should be relevant with specific benchmarks that are attainable for each student. The curriculum should not hold students back unless it is in their best interest. The curriculum should address and challenge academically gifted students in addition to children who are talented in the arts. It should address all student ability levels to ensure each child's success. Academic accountability is paramount to the success of all students.”

E. The Basics

Those interviewed felt that the early years were critical for making sure children had the basic skills – especially reading.² They also felt this was where teachers and students needed

¹ A former high school principal spoke about evading responsibility this way: “The high schools blame middle schools for sending students that are ill prepared. The middle schools blame the elementary schools for not teaching the basics. The elementary schools blame the kindergartens for failing to get students ready to learn. The kindergartens blame the parents. The mothers say, ‘If you could meet the father's family, you'd understand the problem.’”

² This is right in line with the results of research: “A child's initial experience in school also often shapes future academic success or failure. As researchers such as Nancy A. Madden point out, ‘Clearly, the time to provide additional help to children who are at risk of school failure is early on, when they are still motivated and confident

smaller class sizes, teacher's aids, and paraprofessionals. A retired elementary school principal was eloquent and passionate about seizing the opportunity available during these formative years. "We let too much slip from early childhood. Kids must master certain skills before they move from grade to grade. English, writing and math. Start at Pre-K and kindergarten with basic skills, including social skills not taught at home – character, respect, appreciation." He also suggested that schools could go as far as to "provide parent training, so that together, the schools and the parents could help students become productive citizens."

F. Career Paths

There was little sentiment for "academic tracking" programs. This complies with the conclusion reached by education authorities who feel that such programs result in a built-in failure for many students whose interests and talents in non-academic fields go unrecognized and undeveloped.³ A high percentage of those interviewed believe that Lake Wales area students would benefit from the existence of "career paths" early in the education process. A challenging academic path would be one of the career paths.

A high-ranking educator stated that he didn't "see vocational and academic paths as all that different. Cosmetologists need much more chemistry these days. Auto mechanics deal with a higher level of technology – cars are now loaded with computers." The feeling was that school-to-career education and a challenging academic education could be conducted simultaneously in the same schools.

Teachers stressed that the core curriculum of reading, writing, and math can be taught in ways that enable students and their families to appreciate the relevance and practical benefits of the subject matter. A dedicated teacher of agriculture told how he taught fractions to students who are thought to be deficient in math. "I give them the instructions for mixing fertilizer. They take to it quick – and hardly realize that they're learning fractions."

Educators and non-educators alike felt that the key to maintaining an interest level was to find a career path that interests a student and tailor the core curriculum to meet the needs of that path. In the words of the same high-ranking educator, "Teach the core curriculum in each career

and when any learning deficits are relatively small and remediable.' Virtually all children enter 1st grade enthusiastic, motivated and expecting to succeed. By the end of 1st grade, however, students who struggle begin to form negative self-images, become unmotivated and do not participate in the very activities that they need most. These children develop attitudinal handicaps that lead to a pattern of continued academic frustration and are at high risk to fail throughout their education. After the 3rd grade, academic achievement levels appear to remain remarkably stable throughout the school years. These findings make it imperative that schools do whatever is necessary so that students stay at pace in the primary grades." ROBERT H. MCCABE, SEWING A SEAMLESS EDUCATION SYSTEM (Education Commission of the States ed., April 2001).

³ "The tracking system that is so ingrained in high schools is unfair, discriminatory and wastes human resources . . . it assigns self-fulfilling low expectations to students and effectively discards them as valueless. This oppressive practice is damaging to the nation's future, is contrary to fundamental American values and must be terminated. A high school's primary responsibility is to see that every student learns essential core competencies and skills." ROBERT H. MCCABE, SEWING A SEAMLESS EDUCATION SYSTEM (Education Commission of the States ed., April 2001).

path, then the student is free to change paths and still have the core curriculum for the different path.”

It was also pointed out that a collateral benefit of having a number of different career paths is the fact that they also create a number of different ways for more students to succeed. Success promotes self-esteem and healthy self-esteem during these young ages is very important.

G. Inevitability of Adulthood

Consistently mentioned was the motivation most students receive from learning about where they were headed as adults. Educators were big advocates of field trips and other techniques to open students’ eyes to the outside world. They repeated many times the fact that most children are not shown the wide array of available employment opportunities by their parents. As one school official said, “The best field trip we ever had was to Ridge Vo-Tech, where students saw the practical benefit of what we were trying to teach them in the classroom.” As students move up in school, educators spoke of the motivation provided by work-based experiences such as job shadowing, internships, and selected part-time work.

Many comments were made about a student’s need for a “role model” for inspiration and discipline. If a role model is not to be found at home, then the student will often make their own selection – for good or ill. Teachers recognize that they are often looked upon in this way, but stressed the effectiveness of a one-on-one relationship with a trusted mentor in the community who becomes a partner in the education effort. One teacher made an interesting suggestion: “Have a phone in each classroom. If a student acts up, the teacher can right then call the parent or mentor and put the student on the line for a little talk.”

There was a strong consensus that guidance departments are understaffed, spend too much time with test administration, and are woefully inadequate. The feeling was that guidance counselors should help students with career awareness and exploration, identification and pursuit of career goals, field trips, mentors, work-based experiences, academic advising, and assistance in meeting the needs of the student as a whole person. Education reform for Lake Wales schools would have to involve much more attention and support for guidance departments.

H. Arts and Music

Educators and parents alike spoke against cutting arts and music from the curriculum. As documented earlier, the history and tradition of Lake Wales includes substantial participation and achievement in the visual and performing arts – particularly marching and concert bands and choral music. One elementary school principal lamented the loss of a “strings” program that had been cut from her budget. Regular mention was made of the fact that most students need and appreciate this exposure and don’t receive it at home. The loss of arts and music was considered a false economy.

I. More than High School

Those interviewed also felt the need to integrate post-secondary education into the K-12 curriculum. As stated by one educator: “Ninety percent of careers today need some sort of post-secondary education, whether vocational, technical, or academic.” From a teacher: “A good education should have post-secondary training for all career paths – take advantage of Polk Community College and Ridge Vo-Tech.”

A curriculum specialist felt that “high school classes and schedules should mirror college classes and schedules at the 11th and 12th grade. Students should specialize in a particular career path with the ability to change career paths without being penalized. Graduation requirements should be increased with required courses of study designated for each different career path.”

VI. RECOMMENDATIONS

In general, the community would support an innovative curriculum to increase student achievement and provide educational choices so that the students and families within the Lake Wales demographic would gain the lifelong benefits that come from a quality education.

Charter schools offer the community an opportunity to meet these goals. Charter schools are public, non-sectarian schools that operate under a written contract, or *charter*, from the school district. These contracts specify how the school will be held accountable for improved student achievement, in exchange for a waiver of most rules and regulations governing how the schools are operated. Charter schools acquire control over their own budgets, curriculum, and personnel. If the schools do not meet their student achievement goals, their contracts can be revoked by the District. The charter for each Lake Wales area school could specify that it would be operated by the same board, thus forming a charter school system.

Florida’s charter school law calls for responsibility, innovation, choice, and student achievement. The Lake Wales community could meet the intent of the law in the following manner:

A. Responsibility: Local Governance

Charter schools offer the community the opportunity to stop making excuses by blaming others and start accepting responsibility for providing quality education. The parents, teachers, administrators, and community members of the greater Lake Wales area have the talent, credentials and personal commitment necessary to successfully administer the local schools. Charter schools offer the community freedom, opportunity, flexibility, choice, and hope. The responsibility for educating the community’s children will require a serious commitment. Charter schools are not for the fainthearted.

B. Innovation: The College Component

The career paths chosen earlier in the public schools would merge into the community college offerings for the same careers. Community college curriculum advisors would be involved in the design of the middle and high school curriculum to make sure that pre-college

requirements were met in the earlier grades, making remediation unnecessary at the college level. Dual enrollment would allow credits earned in the high school years to go toward both diplomas. Community college instruction would take place on-site in Lake Wales.

The inclusion of Polk Community College as an integral part of the Lake Wales Collegiate School System would present an innovative curriculum designed to substantially enhance the educational experience of the Lake Wales student. The active and visible participation of the community college on-site in Lake Wales as a partner in the collegiate school system would set a higher standard and raise the sights of all students in the system at an early age.

In addition to the two-year curriculum at Polk Community College, the community is indeed fortunate to have available the four-year curricula available at Warner Southern College and Webber International University. The collegiate system could well include mergers of the high school curriculum with the curricula from these three institutions.

Curriculum transitions from elementary to middle, middle to high school, and high school to college would be well planned and coordinated. Pre-transfer contact between students and their next step would be arranged. Students from the next highest school would return to their old schools as mentors and counselors. Anxiety would be replaced by anticipation.

C. Choice: Career Paths

The creation of vocational, technical, and academic career paths in the public school system fits hand in glove with the same career paths available in community colleges. The partnership between the Lake Wales school system and Polk Community College and possibly Ridge Vo-Tech would produce an integrated curriculum that would progress smoothly from public school courses through college courses. The academic path would be designed to be rigorous and challenging, leading to advanced placement credits to be accepted elsewhere in four-year residential universities or here with the continuation of the curriculum in community college.

Preliminary discussions have been held with the president and top administrators at Polk Community College, as well as the presidents of Warner Southern College and Webber International University. They are all willing to investigate the creation of a curriculum beginning in the public school system that merges with the curricula at the college and university level.

D. Student Achievement: Measurable Outcomes

The charter school law is designed to improve student learning and academic achievement. The law calls for accountability and creation of innovative measurement tools to document improvement of learning outcomes. The community would expect to increase the attendance rate, reduce the dropout rate, reduce suspensions, and increase the graduation rate for

the better. A main goal of the collegiate system would be to substantially increase the number of students with college experience and credits.

E. Private Financial Support

The charters would consist of contracts between the District and the Florida not-for-profit corporation known as Lake Wales Collegiate School System, Inc. The corporation's federal status will be a qualified 501(c)(3) corporation, thereby enabling contributions to the corporation to be tax-deductible. The local community would be able to supplement public funding with private support.

VII. BRIDGES TO CROSS

A majority of those interviewed did not like the term "obstacles" that was used for open question #2. They objected to terms that might stop an effort to substantially improve schools, which they saw as essential for the betterment of the community. They preferred to characterize potential negatives as "bridges" to be crossed.

A. Funding

Every principal voiced concerns about being responsible for managing a school's finances. As stated by one principal: "We didn't choose to be business people. We're not geared that way. Our concern is for kids." Principals need to be reassured that they will be provided with the skills of a talented and experienced business manager. Virtually everyone recognized that the complexities of school finance would have to be thoroughly analyzed, understood, and mastered from the beginning.

Hardly anyone knew how charter schools are funded. This is the way it works: State law requires charter schools to be funded "the same as students enrolled in other public schools in the school district." A certain amount (approximately \$4,200 per year) is generated for the typical student. This amount is called FTE, short for Full Time Equivalent. Additional amounts, over and above FTE amounts, are generated for special categories of students, such as "exceptional" students or "Title I" students who need special attention. These and other categories create "categorical" funds. Thus, school funding is based on who the students are, rather than who the teachers are or how much it costs to administer the system.

This feasibility study identified three major bridges that would have to be crossed in order for the project to succeed: 1) a thorough and authoritative analysis of the funds that would be generated by Lake Wales area students, 2) satisfying the veteran teacher, and 3) convincing the Polk County School Board of the merit of the project.

B. Financial Analysis

The first task is to calculate the money available – a function of the number and type of Lake Wales students to be enrolled in the proposed system.

The next task is to calculate administrative costs. Roughly one-third of all funds generated by the students in Polk County are used to pay for the cost of administration. The local administration would be one-tier, less costly, and involve contact with students. (The Pembroke Pines Charter School System uses many of the city's resources and is able to administer their system for 45% of what the Broward County School Board would spend for the same thing.) Any savings in administrative costs would be directed to additional support for teachers and their instruction and guidance of students.

The best part of charter schools is that they take nothing away from other students in the District, who retain 100% of their generated funds. In fact, charter school students receive only 95% of the funds they generate. The other 5% goes to the District and can be used for the benefit of District students.

This means that the District has high expectations for charter schools. The charter contracts usually specify higher achievement for charter schools than occurs at District schools, and charter schools are given less money with which to achieve their goals.

C. The Veteran Teacher

Charter schools are given the authority to make all personnel decisions, including teachers. Veteran teachers are concerned that their higher salaries and benefits would tempt a local board to replace them with younger, less experienced teachers who cost less. They are concerned that by supporting the charter school, they might be "putting their heads on the chopping block."

Lake Wales has a number of very fine veteran teachers. Many of these teachers are now teaching the children of their students a generation ago. Most of these teachers live in the community, are well thought of, and offer a great deal of stability to the school system. School salary structure is such that, after 23 years, teachers receive no more increases. Veteran teachers, if not motivated by outstanding principals, have to be self-motivated to maintain their enthusiasm for the job. If not motivated, as one veteran teacher put it, "A veteran teacher can be like an old horse – and get smellier and smellier each year."

The feeling among administrators and teachers alike was that good faculties contain a healthy mixture of teachers at all experience levels, and that the veterans have a lot to offer young teachers and schools in general.

Those interviewed frequently stated that there is a natural "fear of the unknown." Most teachers were frank to say that they did not know enough about charter schools to be able to assess the benefits and risks that would be presented to their personal situations. Teachers would like to see all the facts presented in a written, fair and "honest" manner and would appreciate the opportunity to participate in meetings where they would be free to ask all questions and would get full and complete answers. To begin this process, a paper on teacher issues containing questions and answers has been attached as an Appendix to this Report.

The reality is that school districts all over Florida will be scrambling for teachers in the next few years. Any teachers – even bad teachers – will have jobs. That’s because the present teacher shortage will be exacerbated by the constitutional requirements for smaller class size, resulting in more classrooms and more teachers. The schools that win the competition for good teachers will be those that provide the best benefits and working conditions. It is absolutely essential for Lake Wales to take full advantage of the flexibility offered by charter schools to provide base pay as well as creative private sector incentives to attract quality teachers.

D. Good Communication and Full Disclosure

The feeling is that those proposing charter schools have a duty to fully communicate with everyone involved.

In reality, state law makes full communication an essential part of success. When applying for a charter, the school must demonstrate the support of at least 50% of the teachers employed at the school and 50% of the parents voting by ballot. A favorable vote would not occur unless both teachers and parents were fully informed and felt comfortable favoring the concept.

E. School Board and District Staff

Charter schools are governed by Section 1002.33 of the Florida Statutes. The law requires that a charter school have a sponsor. The only sponsor identified in the law is the school district. The law requires that a sponsor “shall ensure” that the charter is “innovative, and consistent with the state education goals established by s. 1000.03(5).” In addition, the policy and guiding principles for the K-20 education code are set forth in Section 1000.02 of the Florida Statutes: “. . . [t]he policy of the legislature: (a) To achieve within existing resources a seamless academic educational system that fosters an integrated continuum of kindergarten through [college] for Florida’s students.” The proposal under consideration by the Lake Wales community is in complete compliance with the state education goals and the state policy and guiding principles for education in Florida.

In the event the District denies an application, an applicant may appeal the denial to the State Board of Education. The State Board of Education will act after the Charter School Appeal Commission has made a study of the application and a recommendation to the State Board of Education regarding the decision about the appeal. One half of the members of the Charter School Appeal Commission are appointed from charter schools. The Charter School Appeal Commission and the State Board of Education are both governed by the applicable state law that has been the inspiration for the proposal under consideration by the Lake Wales community.

There are some community members who are cynical about the school board’s willingness to objectively consider a meritorious application for charter schools. They believe the school board will turn down the application even if it contains merit, simply because they don’t want to lose power. The most cynical members of the community report that the staff – as distinguished

from board members – will be dead set against an application, fearing that the loss of central administrative responsibility may result in employment cutbacks.

The majority of community members are less interested in cynicism and more interested in investigating whether applications of overwhelming merit can be submitted to the District School Board for their fair and objective consideration.

There is a desire to ask for the District's help, participation and support during the investigation. In the last analysis, as one principal said, "It's all about the kids." In the event applications are submitted, the hope is that the school board will recognize that there is no intent other than to substantially improve Lake Wales schools for the benefit of its students and their families. Better schools in Lake Wales improves county schools overall. The hope is also that the board will appreciate the credibility, commitment, competence, and community support behind the applications.

The community consensus is that the project to investigate a charter school system should go forward.

VIII. IMPLEMENTATION

The effort should progress carefully through a step-by-step process. If at any point along the way the proposal no longer satisfies the consensus of the community, the proposal should either be changed or abandoned. Provided the project continues to remain consistent with the consensus, the recommended steps are as follows:

1. The final report of the Feasibility Study should be circulated by the Lake Wales Area Chamber of Commerce to the community at large with the request for a critical assessment and suggestions for amendments and changes.
2. After the critical assessment from the community at large, the Chamber of Commerce should make the decision as to whether the Lake Wales community has sufficiently evidenced its support for taking the next step in the process.
3. If so, the next step would be for the Chamber of Commerce to appoint a seven person Steering Committee to oversee a series of subcommittees devoted to each of the segments of the charter school application. In making these appointments, the Chamber should consider 1) those having expertise and experience in the areas of accounting, finance, law, school governance, and classroom teaching, and 2) those that have been identified as having the greatest amount of respect and credibility in the community.
4. The Steering Committee should then appoint nine subcommittees devoted to each of the segments of the charter school application: 1) academic design; 2) finance; 3) personnel (hiring, recruitment, staff development, employee benefits, evaluations, and seniority); 4) governance; 5) operations (admissions and registration, student code of conduct, discipline and dismissal, special education, capacity for alternative education); 6) facilities; 7) transportation; 8)

food service; and 9) the arts. Subcommittee members should either be qualified with respect to the specific subject matter unique to each subcommittee, or be willing to spend the time to learn

the subject matter. These members should also be identified as persons having the greatest amount of respect and credibility in the community. Subcommittees will comprise the larger part of the writing teams for each of the sections of the application. Members should be willing to visit District headquarters and consult with and be guided by those staff members who have the responsibility for reviewing that portion of the application devoted to the subject matter of the subcommittee.

5. The first order of business for the Steering Committee would be to draft a Mission Statement for the Lake Wales Collegiate School System, Inc. and to obtain a comprehensive financial analysis of the Lake Wales area schools in order to determine whether the funds that are available would be sufficient to operate a charter school system.

6. Committee members must be willing to take field trips to charter school sites, including the Pembroke Pines Charter School System in Broward County, McKeel Academy in Lakeland, and Discovery Academy in Lake Alfred.

7. As soon as the subcommittees are formed, a series of small meetings should be scheduled with principals, administrators, and teachers. These meetings would be conducted in a relaxed environment for the purpose of providing full, accurate, and objective information about the consequences of charter schools. The meetings would provide ample opportunity for everyone to ask all questions and receive straightforward answers.

8. A public meeting should be held in the early Spring of this year where all affected parents, administrators, teachers, and community members have an opportunity to be fully informed, hear from the project's local and national consultants, participate, make suggestions, and recommend whether or not the project should continue to go forward.

9. If the consensus of the community is still behind the project, then the required votes among the parents and teachers of each school should be taken to determine which schools would opt to become part of the charter school system.

10. The curriculum design is for a continuous academic program from pre-kindergarten through and including community college. The curriculum requires the favorable vote of at least one elementary school and both the middle school and high school. If, after the vote, any of the three components (elementary, middle, and high school) is missing, the Steering Committee should consider whether to assure the continuous curriculum from pre-kindergarten through community college by filling the void with the creation of a start-up charter school.

11. Retain the services of a specialty firm with the responsibility for working with the subcommittees in their given specialties and preparing the applications for charter school status. The purpose of retaining the professionals in the specialty firm is to assure that the applications will be thorough, authoritative, and of top quality.

12. Applications should be completed by July 1, in time to go to the printer.
13. Applications should be submitted on the first working day in the month of August, 2003 – the earliest date allowed by law.
14. The Polk County School District will have 60 days within which to approve or deny the applications.
15. In the event an application is denied, the Steering Committee will determine whether to submit the application to the State Board of Education for reversal of the District decision.
16. Apply for federal charter school start-up grants of \$150,000 to \$250,000 per approved charter school for the purpose of assistance during the first year of operation.
17. The first students in the Lake Wales Collegiate School System should be in place on the first day of school in August of 2004.

IX. PROGRESS TO DATE

A number of preliminary steps have been taken in order to place the community in the position to further investigate the project.

1. An interim draft of this report has been distributed to: 1) all those interviewed, 2) the persons identified in the interviews as community leaders, 3) members of the School Board, and 4) the Superintendent of Polk County Schools. In addition, a copy of the interim draft was sent to the Chamber of Commerce for distribution to the community. Everyone receiving a copy was asked to check for accuracy and to make suggestions for revision and improvement.
2. A Florida not-for-profit corporation known as Lake Wales Collegiate School System, Inc. has been formed. The accounting firm of Bunting, Tripp & Ingley has applied to the federal government for 501(c)(3) status. The initial incorporators are listed as Robert L. Gibson, Jr., Clinton Horne, and Laura Hunt.
3. The estimated budget for a thorough investigation and proposal has been set at \$50,000 to meet the cost of expert consultants, application specialists, start-up expenses, and office staff for a period of seven months.
4. The Lake Wales community has responded enthusiastically by committing \$310,000 in the form of cash donations, loans, and pledges to properly explore the feasibility of operating a conversion charter school system for Lake Wales area students. Sixty thousand of this amount is in cash operating funds and \$250,000 has been pledged for a reserve fund. These amounts have come in the form of a \$10,000 grant from the Lake Wales Area Chamber of Commerce originally from Progress Energy, and in \$25,000 increments from each of the

following: Robin and Jean Gibson Fund, Herndon Charitable Foundation, Inc., Florida's Natural, American Bank & Trust, SunTrust Bank, Citizens Bank, David C. and June Carter

Ullman, Frank M. and Margaret N. Hunt, Clinton Horne, Dr. John and Mrs. Violeta B. Salud, James P. and Julie S. Seay, and Mr. Steve and Dr. Georgianna Sorensen.

5. The corporate office of the Lake Wales Collegiate School System has been opened and former teacher Mrs. Karen Williams has been hired as the office manager. The office is located at 212 E. Stuart Avenue, Lake Wales, Florida, 33853. The phone number is 734-0000. The email address is LWCharterSchools@gvalawyers.com.

6. Harold Maready, principal of the McKeel Academy of Technology charter school of Lakeland, Florida, has been retained as the local consultant for the project.

7. Dr. Robert H. McCabe, author and Distinguished Fellow of the Education Commission of the States, has agreed to serve as the national consultant for the project.

8. Assistance has been received from Dr. Cathy Wooley-Brown, the state Charter School Coordinator at the Florida Charter School Resource Center at the University of South Florida.

Respectfully submitted,

Robin Gibson
Clint Horne
Laura Hunt
Incorporators, Lake Wales
Collegiate School System

TEACHER ISSUES

Introduction

It should be clearly understood that the Lake Wales Area Chamber of Commerce and the not-for-profit corporation known as Lake Wales Collegiate School System, Inc. ("System") is only in the beginning stages of its evaluation of area schools. A feasibility study designed to identify community consensus was completed January 31, 2003. From there, the effort will progress through a careful and thorough step-by-step process. At any point along the way that a proposed solution no longer satisfies the consensus of the community, the proposal should be changed to meet the consensus or abandoned.

The project is in its formative stages. Each school has been asked to nominate two teachers to be involved at the beginning of the project. The intent is to enable the teachers to be part of forming the end product.

No decisions have been made. The following answers are only recommendations from the Chamber group to the Steering Committee. The Steering Committee's job is to supervise the possible *formation* of the school system. Once the school system is in place, it would be *operated* by a Board of Trustees. Decisions will be made by the Committee and the Board.

Recommended Answers to the Most Frequently Asked Questions

1. *What is a charter school?*

Charter schools are public, non-sectarian schools that operate under a performance contract, or charter, from the District school board. The charter school is exempt from virtually all District rules and regulations and is given the power to govern itself, including the freedom to set its own policy on such issues as curriculum, teaching style, personnel, and discipline. The District holds the charter school accountable for performance pursuant to the terms of the charter. If performance and achievement goals set forth in the charter are not met, the District school board may revoke the charter.

2. *How are charter schools funded?*

Charter schools are funded the same way traditional public schools are funded. The funds generated by students depend on the number and type of students enrolled in the school. Of the amounts – state and federal – generated by students enrolled in the charter school, 95% goes directly to the charter school, while the remaining 5% stays with the District to cover overhead expenses.

3. *How is it that charter schools have a chance to be economically feasible?*

In the Polk County School District, approximately one-third of all student-generated funds are used to pay for the cost of administration. Charter schools are smaller and more manageable.

If the charter school can be effectively administered for less than the cost of District administration, the savings can be directed to additional support for teachers and their instruction and guidance of students.

4. *What about teacher retirement?*

A charter school has the option to be either a public or a private employer. We recommend that the charter schools opt to be public employers. As such, teachers in the charter schools would remain under the Florida Retirement System.

5. *What about teacher salaries?*

The Charter's Board of Trustees has full flexibility concerning teacher salaries. The recommendation is for teacher salaries in the charter schools to be as good or better than the District schools. The Trustees would be able to guarantee a teacher's base pay and also implement creative, private sector compensation techniques, such as signing bonuses and additional incentive pay. Bonuses could be based on a positive model instead of being negative or punitive. Other non-monetary attractions could include a better working environment in the form of lower pupil-teacher ratios, student and teacher technology programs, classroom materials and supplies, an atmosphere conducive to optimum learning, and strong community support.

6. *What about insurance?*

The Board of Trustees also has flexibility to consider different insurance plans. Once again, the recommendation is for insurance plans in the charter schools to be as good or better than the insurance plans in the District Schools. The recommendation is for teachers to have medical and life insurance that is at least equal to the Polk County School Board plan. The Trustees would have the flexibility to consider superior plans as well.

7. *How will I be evaluated?*

The evaluation process would probably not be very different. Some charter schools evaluate faculty by asking each teacher to develop a list of yearly goals. At the end of the year, the faculty member receives feedback in relation to those goals. This process is a constructive way to inspire and assist a teacher with annual improvement.

8. *Is my job secure?*

The reality is that school districts all over Florida will be scrambling for teachers in the next few years. Any teachers – even bad teachers – will have jobs. That's because the present teacher shortage will be exacerbated by the constitutional requirements for smaller class size, resulting in more classrooms and more teachers. The schools that win the competition for teachers will be those that provide the best benefits and working conditions. It is absolutely essential for Lake Wales to take full advantage of the flexibility offered by charter schools to provide base pay as well as creative private sector incentives to attract quality teachers. Both the Lake Wales Collegiate School System and the teacher will have choices. The System can choose

which teacher to hire. The teacher can choose whether to work for the System, or to keep a position with the Polk County School District.

9. *What about discipline?*

Charter schools are normally schools of choice. The Lake Wales system will strive to work out an arrangement with the District where the System will not “dump” its problem students on District schools. In fairness to the rest of the District, our intent is to make arrangements to properly handle our own discipline problems.

10. *What about ESE and ESOL students and In-service opportunities?*

The ESE students will remain within the Lake Wales Collegiate School System and will be served according to their Individual Education Plans. The funding for these students will remain the same and the charter school system will receive the funds for the education of those students.

ESOL students will continue to be served and funding will remain the same.

In-service training will remain the same. Once again, the recommendation is for in-service training to be as good or better for charter schools than it is for District schools.

11. *What about class size?*

Charter schools are subject to the constitutional class size requirements. Once again, the recommendation is for class size requirements to be as good or better in the charter schools than they will be in the District schools.

Comment

We realize that there are many more questions to be answered, and that the answers to these questions will create follow-up questions. Teachers are the key to a quality school system. We have asked teachers to play an integral role in the formation of the charter system.

Meetings will be held to answer all questions. The questions and answers given above are only the beginning.