South Bend Empowerment Zone

About the Zone

June 12, 2023

Cultivate the **mind.** Inspire the **change.**

What is the "Zone"?

What is the Empowerment Zone?

- **SBEZ schools are still public schools**. While not a part of the corporation, SBEZ schools are a part of the myriad of schools choices within the wider South Bend community

- **SBEZ is also what is known as a "Transformation Zone"**
  - Transformation Zones exist in other Indiana districts and numerous states across the country

- "Transformation Zones" are **a tool to support groups of struggling public schools with resources and flexibility** that are typically not available to other district schools, including:

  - Increased state and federal funding

  - Autonomy to implement new programs and to do so more quickly than is typically possible in the larger district

- "Transformation Zones" are also intended to provide examples of new **innovations that the broader district may choose to implement**

The Zone is a common model of autonomous district schools

TRADITIONAL DISTRICT SCHOOLS	AUTONOMOUS DISTRICT SCHOOLS	CHARTER SCHOOLS

AUTONOMOUS DISTRICT SCHOOL CATEGORIES
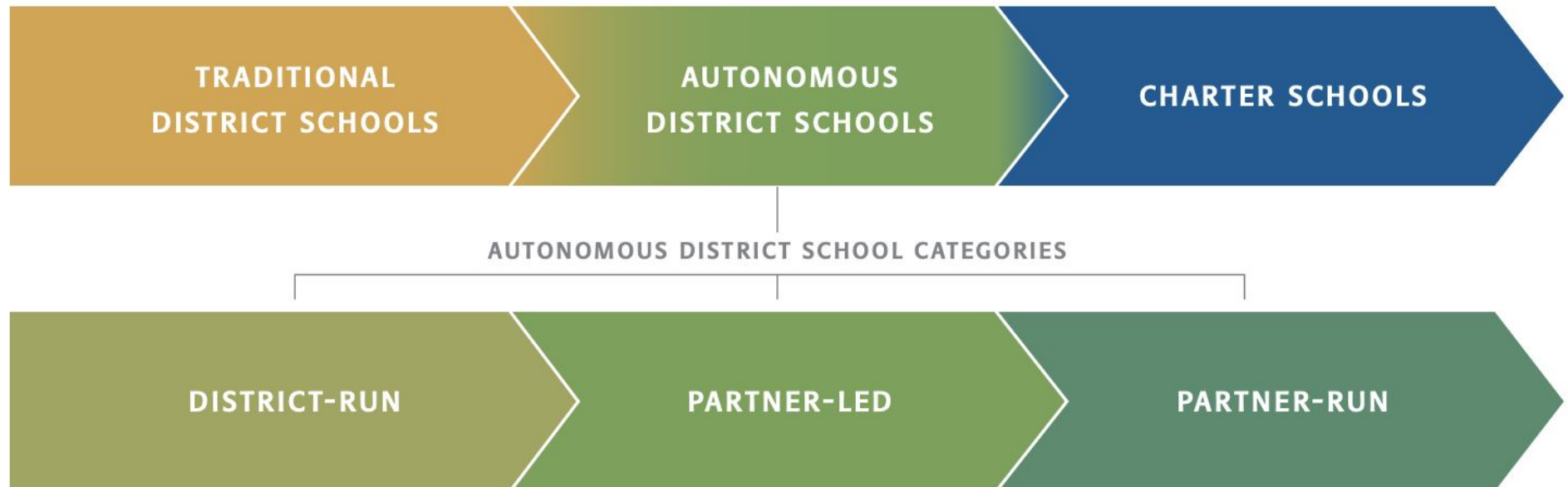
DISTRICT-RUN	PARTNER-LED	PARTNER-RUN
Schools may operate with waivers from certain district policies, collective bargaining agreements, and state laws, but district maintains traditional relationship with school leaders/staff, who remain district employees.	District transfers some operational authority to an independent organization, but maintains control over certain critical operating policies (such as adherence to collective bargaining agreement) and remains the employer of school staff.	District transfers school operational authority to an independent organization; district oversight (governance) limited to performance contract with partner organization.

For example, more flexibility and autonomy have allowed the Zone to:

Student supports

- Implement tools and systems for more supportive interventions (e.g., Promotion in Doubt)

- Increase social workers and/or other mental health supports in schools

- Implement the Q2 reset (e.g., code of conduct, vape detectors, clear backpacks) to reduce disciplinary incidents

Instruction

- Implement a different school year calendar and daily school schedule to better meet the needs of students and staff

- Implement tiered high-quality curriculum

- Increase professional development for teachers

- Design summer school programming

Resources

- Spend financial resources on what matters most for student outcomes

- Contract with third-party vendors to improve services such as transportation

As a "transformation zone" the Zone is also an incubator for innovations that can benefit SBCSC

- As a smaller and therefore nimbler portfolio of schools, the Zone is able to implement and pivot on policies and practices—and share lessons learned with SBCSC

For example

- In 2022-23, the Zone implemented clear backpacks and a new code of conduct—which SBCSC has adopted, or is currently considering

- The Zone has demonstrated the feasibility of a weekly early release increased teacher professional development—teachers at SBCSC have expressed interest in a similar approach

- Looking ahead, SBCSC has asked the Zone to pilot PowerSchool for managing IEPs and 504 plans

The Zone made progress in 2022-23, and there is more work to be done

- As presented in the "State of the Zone" presentation on May 1st, the Zone made progress across the three domain areas: Leadership, Learning, and Resources

- This progress includes, for example:

Leadership	Learning	Resources
- New handbooks for clarity of expectations and support for employees, teachers, and students/families - Building leader and teacher leader capacity with structured collaboration focused on Standards	- BOY to EOY iReady growth in all schools, grades, and subgroups 2021-22 to 2022-23 increase in proficiency across all schools in both ELA and Math - Implementation of Promotion in Doubt intervention - Increased professional development for teachers	- Increased financial transparency and reporting - Cut 2022-23 budget by $2.3M - Further reduce 2023-24 budget by $3M

Partnership = Progress

Reflections from Zone leadership team point to among various reasons for this year's progress, the partnership between SBEZ and SBCSC

- The Zone has implemented, and will continue to implement, changes based on the advice of SBCSC trustees, including:
  - Articulated a clear strategy for increasing fully certified teachers at Zone schools
  - Increased financial transparency and reporting
  - Implemented central office efficiencies
- Serving as an incubator to evaluate best and emerging practices, the Zone has implemented programs and policies, and share key findings with SBCSC for consideration to increase equitable supports for all high-needs schools
- Collaboration between Zone and SBCSC counterparts at many levels have contributed to the Zone's achievements this year, including:
  - Thought partnership and professional development opportunities provided by Dr. Cummings
  - Collaboration with Dr. White on school and student policies
  - Close working relationship between the Special Education teams (now consolidating within SBCSC)

Zone Finances

Overview of Zone funding

- The Zone receives its funding from **(1) standard state and federal grants,** based on a pro rata share per the student population, and **(2) special funding due to its status as a Transformation Zone**

- **Zone funds are held almost entirely by SBCSC (per 22-23 budget):**
  - SBCSC holds $35M (97% of Zone funds)
  - The Zone's 501(c)(3) holds $1.1M (3% of Zone funds)

- **SBCSC executes all transactions** from the $35M of Zone funds directly to vendors and other recipients (e.g., salaries and benefits, transportation)
  - The Zone decides how to spend the money, but **SBCSC completes the transactions** on our behalf; the Zone has no direct access to these funds

- The Zone receives a **separate, independent audit**, which has had no findings during the last three years
  - Zone funds are **also included in SBCSC's own audit**, and indirectly in **SBCSC's budget approval** process

School funding follows the student between schools and between districts
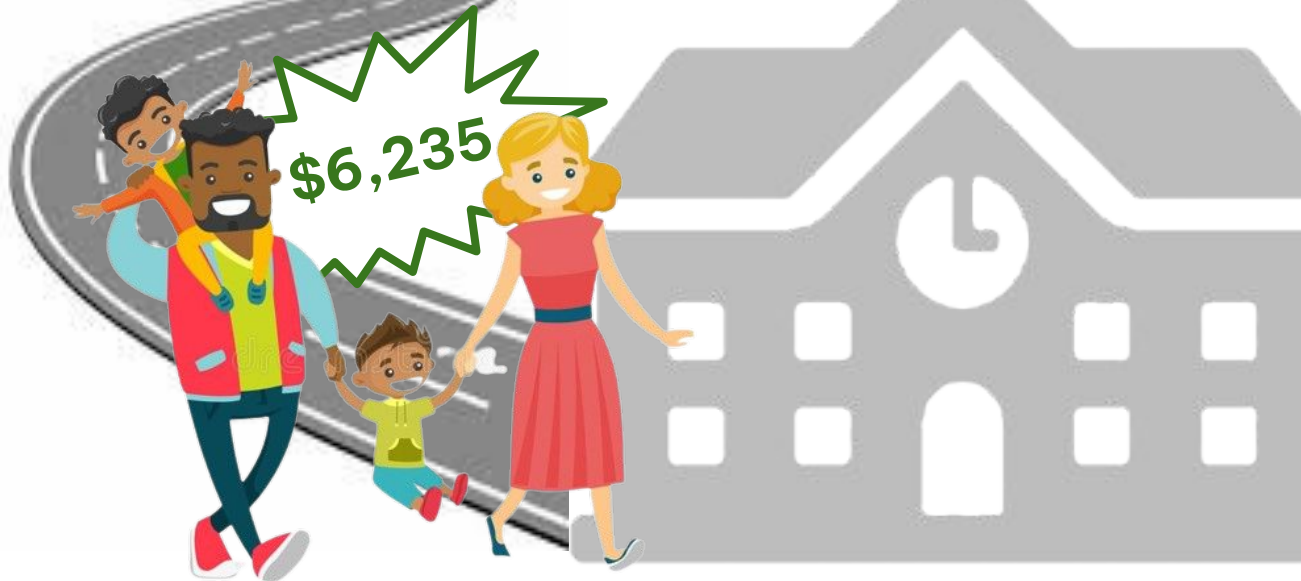
Muessel Elementary

$6,235

State funds 2023
- Basic Grant: $6235
- Complexity $3775
- SPED: $500-10,575
- CTE: Varies per value of course

Mishawaka School District

$6,235

Harrison Elementary

$6,235

Where the money comes from

TOP FUNDING SOURCES SY22-23
(not comprehensive):

- ***State tuition support*, including:**
  - Basic grant: $13M   ($6,235/student)
  - Complexity: $4M   ($3,775/student)
  - SPED: $1.2M   ($500-$10,575/student)

- **Other Funding Sources (State & Federal):**
  (Zone only receives a pro-rata share based on ADM)
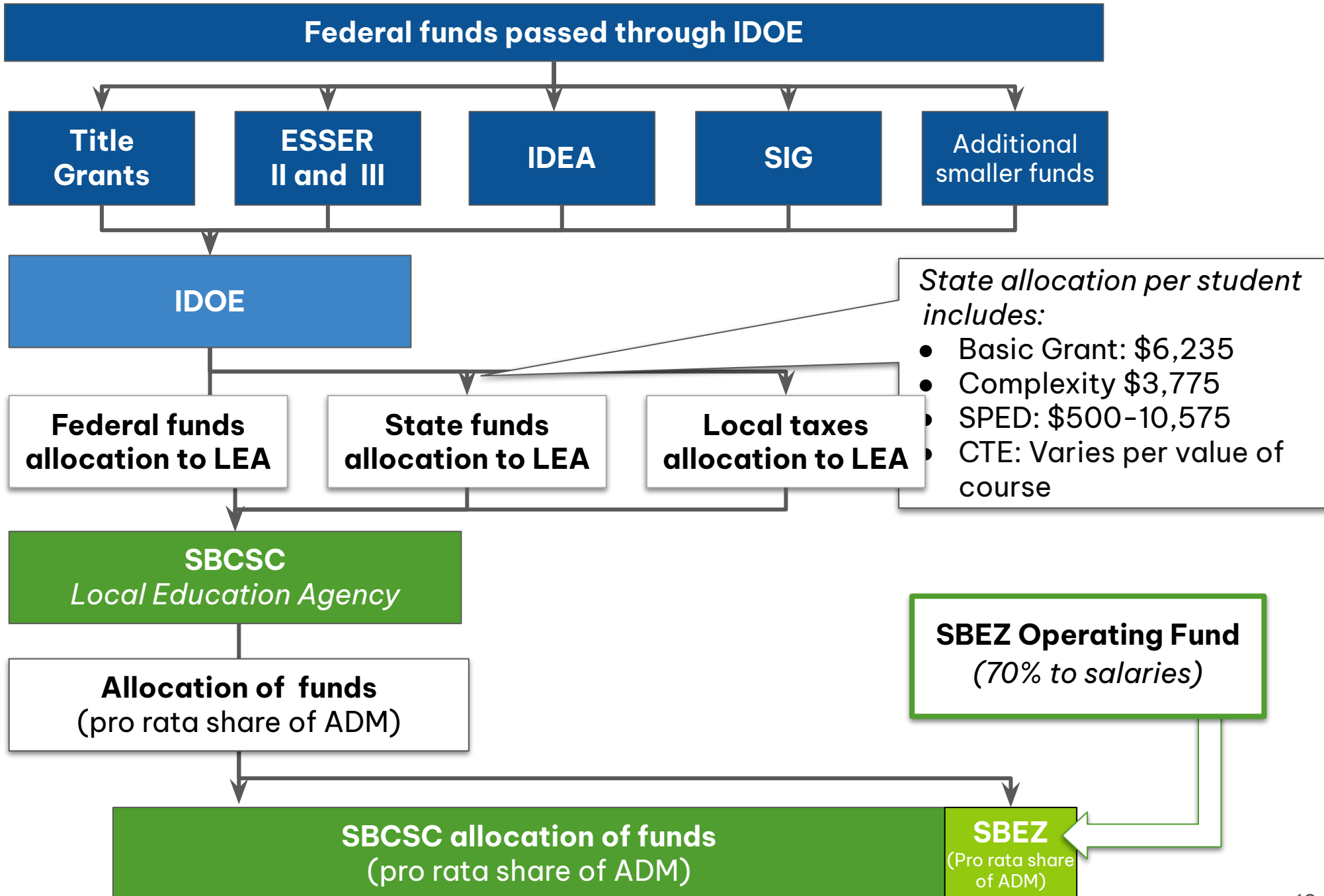 - ESSER II and III: $8.4M
  - Title I: $1.4M
  - SIG: $824K

- **Additional Funding Specific to Zone's SEL Programs**
  - Pride: $740K - *Specific to Zone's SEL programs*

- The Zone continues to **fundraise and received $460,000** in financial and in-kind donations in 2022-23

How the funding flows

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│                    Federal funds passed through IDOE                       │
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Title Grants	ESSER II and III	IDEA	SIG	Additional smaller funds

IDOE

State allocation per student includes:
- Basic Grant: $6,235
- Complexity $3,775
- SPED: $500–10,575
- CTE: Varies per value of course

Federal funds allocation to LEA	State funds allocation to LEA	Local taxes allocation to LEA

SBCSC
Local Education Agency

Allocation of funds
(pro rata share of ADM)

SBEZ Operating Fund
(70% to salaries)

SBCSC allocation of funds
(pro rata share of ADM)

SBEZ
(Pro rata share of ADM)

Zone spending: ~$6M to SBCSC for shared services (23-24 Projected)

- **Context**:
  - The Zone's students are approximately **14% of the district**
  - This payment is **18% of the Zone's total budget**

- The $6M primarily comes from the Zone's **pro rata share** of **Operations & Referendum Funds** based on ADM

- **The $6M paid to SBCSC covers:**
  - **$3M for the district's indirect costs** (e.g., share of Superintendent, CFO, SBCSC operations departments)

  - **$3M in direct operations expenses** (e.g., facilities, utilities, custodial)

Direct operations expenses are **fixed costs that SBCSC would incur** whether the schools are run by the Zone or SBCSC.

The Zone is financially sustainable

- We practice **strategic resource management** so we can focus on both **sustainability** and what matters most for improving **student outcomes**.

- In 2022-23, **we cut spending by $2.3M** by
  - Decreasing central office staff positions
  - Negotiating vendor contracts
  - Decreasing number of purchasing accounts

- For 2023-24, we project **reducing spending by an additional $3M**
  - Building a conservative balanced budget
  - Reassessing transportation (savings of approximately $778,000)

- Despite cuts, we are **maintaining a high level of student investment**–averaging $11,700 per pupil, to ensure that we continue to meet needs of your students.

Data about Student progress

2022-2023

Student behavior and disciplinary incidents have decreased since last year

Office Referrals		
School	**2021-2022**	**2022-2023**
Coquillard	1411	1315
Harrison	706	329
Navarre	1901	1320
Warren	120	59
Wilson	535	608
Total	**4673**	**3631 (22.3%)**

Suspension (In School)		
School	**2021-2022**	**2022-2023**
Coquillard	54	6
Harrison	17	5
Navarre	345	135
Warren	2	12
Wilson	15	23
Total	**433**	**181 (58.2%)**

Suspension (Out of School)		
School	**2021-2022**	**2022-2023**
Coquillard	377	379
Harrison	183	155
Navarre	563	569
Warren	141	36
Wilson	124	191
Total	**1388**	**1330 (18.0%)**

Student attendance also improved

SBEZ Attendance Data				
School	**2019**	**2020**	**2021**	**2022**
Coquillard	92.80%	80.40%	85.40%	85.90%
Harrison	89.70%	83.50%	86.30%	87.20%
Navarre	92.40%	89.60%	83.30%	85.10%
Warren	91.20%	76.60%	80.70%	84.80%
Wilson	91.60%	83.50%	87.40%	88.90%
SBEZ Overall	**91.30%**	**84.00%**	**85%**	**86.50%**

iReady results

2022-2023

The iReady diagnostic provides several metrics to assess progress

- **Placement Level**: Where a student falls relative to the expectation for the grade and subject.

- **Median Progress toward Annual Growth Goal**: For any category, this measure shows the median percentage of growth toward the annual goal. Fifty percent of students will be above this value and fifty percent of students would be below this value.

- **Percent of Students Meeting Annual Growth Goal**: This measure shows what percentage of students have already met their annual growth goal.

- **Percent of Students with Improved Placement**: Shows how many students have moved at least one level forward.

2022-2023 iReady Benchmark Academic Data Goals

#1: Reduce the number/percent of students 2 grade levels or more behind in reading and math; comparing the same children who took the iReady benchmark assessment in the fall, winter, and spring.

#2: Increase the number/percent of students on/above grade level in reading and math; comparing the same children who took the iReady benchmark assessment in the fall, winter, and spring.

◼ = 5%+ improvement in between assessments
◼ = 1%-4% improvement in between assessments
◼ = No movement in between assessments
◼ = Negative movement in between assessments

Summary Overview

1. The number of Kindergarten to 8th grade students *on grade level or above* increased **3.9x** from Fall to Spring in Reading and increased **8.6x** in Math.

2. There are **289** fewer students that are *2 or more years below grade level* in Reading and **343** fewer students in Math.

3. In Reading and Math, **48%** and **37%** of students, respectively, have *met or exceeded their annual typical growth goal.*

iReady Comparison from 2021 to 2023: two or more grade levels below

= Increase from previous year
= Decrease from previous year

Reading				Math			
SBEZ School	**2021 EOY**	**2022 EOY**	**2023 EOY**	**SBEZ School**	**2021 EOY**	**2022 EOY**	**2023 EOY**
Coquillard	35%	42%	38%	Coquillard	32%	43%	42%
Harrison	36%	35%	32%	Harrison	37%	32%	31%
Navarre	81%	79%	73%	Navarre	81%	86%	80%
Warren	32%	31%	29%	Warren	31%	31%	24%
Wilson	39%	36%	33%	Wilson	33%	34%	30%
SBEZ Overall	**47%**	**48%**	**42%**	**SBEZ Overall**	**46%**	**48%**	**43%**

iReady Comparison from 2021 to 2023: on or above grade level

■ = Decrease from previous year
■ = Increase from previous year

Reading			
SBEZ School	2021 EOY	2022 EOY	2023 EOY
Coquillard	21%	18%	24%
Harrison	21%	23%	26%
Navarre	6%	10%	14%
Warren	31%	32%	35%
Wilson	22%	25%	27%
SBEZ Overall	**19%**	**20%**	**24%**

Math			
SBEZ School	2021 EOY	2022 EOY	2023 EOY
Coquillard	12%	13%	18%
Harrison	15%	20%	22%
Navarre	5%	4%	3%
Warren	26%	36%	30%
Wilson	18%	17%	21%
SBEZ Overall	**14%**	**15%**	**18%**

May 1st iReady Comparison: Data presented on May 1st reflected only grades 3-8. Data shown as of May 22nd reflects grades K-8

Reading

% Two or More Grade Levels Below		
School	May 1, 2023	May 22, 2023
Coquillard	63%	38%
Harrison	48%	32%
Navarre	72%	73%
Warren	48%	29%
Wilson	49%	33%
SBEZ Overall	**58%**	**42%**

Math

% Two or More Grade Levels Below		
School	May 1, 2023	May 22, 2023
Coquillard	66%	42%
Harrison	46%	31%
Navarre	79%	80%
Warren	41%	24%
Wilson	44%	30%
SBEZ Overall	**60%**	**43%**

May 1st iReady Comparison: Data presented on May 1st reflected only grades 3-8. Data shown on May 22nd reflects grades K-8

Reading

% On or Above Grade Level		
School	**May 1, 2023**	**May 22, 2023**
Coquillard	15%	24%
Harrison	19%	26%
Navarre	14%	14%
Warren	32%	35%
Wilson	18%	27%
SBEZ Overall	**18%**	**24%**

Math

% On or Above Grade Level		
School	**May 1, 2023**	**May 22, 2023**
Coquillard	12%	18%
Harrison	17%	22%
Navarre	3%	3%
Warren	26%	30%
Wilson	12%	21%
SBEZ Overall	**11%**	**18%**

SY2022-23 movement from 2 or more grade levels below by school: Reading

% 2 or More Grade Levels Below				
School	**Fall '22**	**Winter '22**	**Spring '23**	**Met Goal?**
Coquillard	77%	71%	38%	**Yes -** Decreased % two or more grade levels below by 39%
Harrison	67%	56%	32%	**Yes -** Decreased % two or more grade levels below by 35%
Navarre	85%	81%	73%	**Yes -** Decreased % two or more grade levels below by 12%
Warren	65%	51%	29%	**Yes -** Decreased % two or more grade levels below by 36%
Wilson	71%	59%	33%	**Yes -** Decreased % two or more grade levels below by 38%
SBEZ Overall	**75%**	**66%**	**42%**	**Yes - Decreased % two or more grade levels below by 33%**

SY2022-23 movement from 2 or more grade levels below by grade: Reading

Grade	% 2 or More Grade Levels Below			Met Goal?
	Fall '22	Winter '22	Spring '23	
K	-	-	-	N/A
1	26%	8%	5%	**Yes** - Decreased % two or more grade levels below by 21%
2	77%	54%	37%	**Yes** - Decreased % two or more grade levels below by 40%
3	75%	58%	52%	**Yes** - Decreased % two or more grade levels below by 23%
4	57%	49%	44%	**Yes** - Decreased % two or more grade levels below by 13%
5	78%	69%	60%	**Yes** - Decreased % two or more grade levels below by 18%
6	84%	87%	78%	**Yes** - Decreased % two or more grade levels below by 6%
7	91%	86%	76%	**Yes** - Decreased % two or more grade levels below by 15%
8	79%	67%	62%	**Yes** - Decreased % two or more grade levels below by 17%

SY2022-23 movement from 2 or more grade levels below by subgroup: Reading

% 2 or More Grade Levels Below				
Group	**Fall '22**	**Winter '22**	**Spring '23**	**Met Goal?**
Black	82%	73%	47%	**Yes** - Decreased % two or more grade levels below by 35%
Two or More Races	67%	57%	36%	**Yes** - Decreased % two or more grade levels below by 31%
White	71%	63%	40%	**Yes** - Decreased % two or more grade levels below by 31%
Hispanic / Latino	71%	65%	44%	**Yes** - Decreased % two or more grade levels below by 27%
ELL	81%	74%	51%	**Yes** - Decreased % two or more grade levels below by 30%
Non-ELL	74%	65%	41%	**Yes** - Decreased % two or more grade levels below by 33%
SPED	89%	86%	68%	**Yes** - Decreased % two or more grade levels below by 21%
Non-SPED	72%	62%	56%	**Yes** - Decreased % two or more grade levels below by 16%
Male	75%	68%	42%	**Yes** - Decreased % two or more grade levels below by 33%
Female	75%	66%	43%	**Yes** - Decreased % two or more grade levels below by 32%

SY2022-23 movement from 2 or more grade levels below by school: Math

	% 2 or More Grade Levels Below			
School	Fall '22	Winter '22	Spring '23	Met Goal?
Coquillard	79%	73%	42%	**Yes** - Decreased % two or more grade levels below by 37%
Harrison	70%	54%	31%	**Yes** - Decreased % two or more grade levels below by 39%
Navarre	87%	83%	80%	**Yes** - Decreased % two or more grade levels below by 7%
Warren	67%	55%	24%	**Yes** - Decreased % two or more grade levels below by 43%
Wilson	75%	48%	30%	**Yes** - Decreased % two or more grade levels below by 45%
SBEZ Overall	**78%**	**65%**	**43%**	**Yes - Decreased % two or more grade levels below by 35%**

SY2022-23 movement from 2 or more grade levels below by grade: Math

% 2 or More Grade Levels Below				
Grade	Fall '22	Winter '22	Spring '23	Met Goal?
K	-	-	-	**N/A**
1	31%	11%	5%	**Yes** - Decreased % two or more grade levels below by 26%
2	70%	50%	36%	**Yes** - Decreased % two or more grade levels below by 34%
3	77%	51%	47%	**Yes** - Decreased % two or more grade levels below by 30%
4	68%	58%	49%	**Yes** - Decreased % two or more grade levels below by 19%
5	74%	61%	55%	**Yes** - Decreased % two or more grade levels below by 19%
6	86%	83%	80%	**Yes** - Decreased % two or more grade levels below by 6%
7	91%	88%	87%	**Yes** - Decreased % two or more grade levels below by 4%
8	84%	78%	71%	**Yes** - Decreased % two or more grade levels below by 13%

SY2022-23 movement from 2 or more grade levels below by subgroup: Math

	% 2 or More Grade Levels Below			
Group	Fall '22	Winter '22	Spring '23	Met Goal?
Black	86%	71%	47%	**Yes** - Decreased % two or more grade levels below by 39%
Two or More Races	73%	58%	36%	**Yes** - Decreased % two or more grade levels below by 37%
White	72%	62%	40%	**Yes** - Decreased % two or more grade levels below by 31%
Hispanic / Latino	73%	64%	44%	**Yes** - Decreased % two or more grade levels below by 29%
ELL	80%	70%	51%	**Yes** - Decreased % two or more grade levels below by 29%
Non-ELL	77%	64%	41%	**Yes** - Decreased % two or more grade levels below by 36%
SPED	91%	82%	68%	**Yes** - Decreased % two or more grade levels below by 23%
Non-SPED	75%	62%	36%	**Yes** - Decreased % two or more grade levels below by 39%
Male	74%	64%	43%	**Yes** - Decreased % two or more grade levels below by 31%
Female	83%	68%	42%	**Yes** - Decreased % two or more grade levels below by 41%

SY2022-23 movement to on or above grade level by school: Reading

% On or Above Grade Level			
School	Fall '22	Winter '22	Spring '23	Met Goal?
Coquillard	10%	10%	24%	**Yes** - Increased % on or above grade level by 14%
Harrison	8%	14%	26%	**Yes** - Increased % on or above grade level by 18%
Navarre	7%	10%	14%	**Yes** - Increased % on or above grade level by 7%
Warren	12%	20%	35%	**Yes** - Increased % on or above grade level by 23%
Wilson	6%	12%	27%	**Yes** - Increased % on or above grade level by 21%
SBEZ Overall	**8%**	**12%**	**24%**	**Yes** - Increased % on or above grade level by 16%

SY2022-23 movement to on or above grade level by grade: Reading

% On or Above Grade Level			
Grade	**Fall '22**	**Winter '22**	**Spring '23**	**Met Goal?**
K	11%	29%	60%	**Yes** - Increased % on or above grade level by 49%
1	3%	11%	30%	**Yes** - Increased % on or above grade level by 27%
2	1%	10%	18%	**Yes** - Increased % on or above grade level by 17%
3	9%	19%	26%	**Yes** - Increased % on or above grade level by 17%
4	9%	12%	16%	**Yes** - Increased % on or above grade level by 7%
5	8%	10%	12%	**Yes** - Increased % on or above grade level by 4%
6	6%	7%	9%	**Yes** - Increased % on or above grade level by 3%
7	5%	6%	14%	**Yes** - Increased % on or above grade level by 9%
8	9%	18%	20%	**Yes** - Increased % on or above grade level by 11%

SY2022-23 movement to on or above grade level by subgroup: Reading

% On or Above Grade Level			
Group	Fall '22	Winter '22	Spring '23	Met Goal?
Black	6%	9%	21%	**Yes** - Increased % on or above grade level by 15%
Two or More Races	9%	21%	27%	**Yes** - Increased % on or above grade level by 18%
White	10%	14%	27%	**Yes** - Increased % on or above grade level by 17%
Hispanic / Latino	8%	13%	24%	**Yes** - Increased % on or above grade level by 16%
ELL	4%	8%	15%	**Yes** - Increased % on or above grade level by 11%
Non-ELL	9%	13%	26%	**Yes** - Increased % on or above grade level by 17%
SPED	4%	5%	11%	**Yes** - Increased % on or above grade level by 7%
Non-SPED	9%	14%	27%	**Yes** - Increased % on or above grade level by 18%
Male	7%	11%	23%	**Yes** - Increased % on or above grade level by 16%
Female	9%	13%	25%	**Yes** - Increased % on or above grade level by 16%

SY2022-23 movement to on or above grade level by school: Math

% On or Above Grade Level				
School	Fall '22	Winter '22	Spring '23	Met Goal?
Coquillard	4%	4%	18%	**Yes** - Increased % on or above grade level by 14%
Harrison	3%	6%	22%	**Yes** - Increased % on or above grade level by 19%
Navarre	1%	2%	3%	**Yes** - Increased % on or above grade level by 2%
Warren	5%	19%	30%	**Yes** - Increased % on or above grade level by 25%
Wilson	1%	5%	21%	**Yes** - Increased % on or above grade level by 20%
SBEZ Overall	**2%**	**5%**	**18%**	**Yes** - Increased % on or above grade level by 16%

SY2022-23 movement to on or above grade level by grade: Math

% On or Above Grade Level				
Grade	Fall '22	Winter '22	Spring '23	Met Goal?
K	2%	16%	44%	**Yes** – Increased % on or above grade level by 42%
1	2%	7%	29%	**Yes** – Increased % on or above grade level by 27%
2	1%	4%	12%	**Yes** – Increased % on or above grade level by 11%
3	1%	5%	15%	**Yes** – Increased % on or above grade level by 14%
4	4%	11%	20%	**Yes** – Increased % on or above grade level by 16%
5	3%	6%	10%	**Yes** – Increased % on or above grade level by 7%
6	1%	1%	2%	**Yes** – Increased % on or above grade level by 1%
7	0%	1%	1%	**Yes** – Increased % on or above grade level by 1%
8	1%	5%	8%	**Yes** – Increased % on or above grade level by 7%

SY2022-23 movement to on or above grade level by subgroup: Math

% On or Above Grade Level				
Group	**Fall '22**	**Winter '22**	**Spring '23**	**Met Goal?**
Black	1%	2%	15%	**Yes** - Increased % on or above grade level by 14%
Two or More Races	3%	11%	22%	**Yes** - Increased % on or above grade level by 19%
White	3%	7%	19%	**Yes** - Increased % on or above grade level by 16%
Hispanic / Latino	3%	6%	16%	**Yes** - Increased % on or above grade level by 13%
ELL	0%	3%	11%	**Yes** - Increased % on or above grade level by 11%
Non-ELL	3%	6%	19%	**Yes** - Increased % on or above grade level by 16%
SPED	1%	2%	7%	**Yes** - Increased % on or above grade level by 6%
Non-SPED	2%	6%	20%	**Yes** - Increased % on or above grade level by 18%
Male	3%	7%	19%	**Yes** - Increased % on or above grade level by 16%
Female	1%	3%	16%	**Yes** - Increased % on or above grade level by 15%

Next steps

Where are we in the process?

- **Dr. Cummings, Dr. Lewis, and SBCSC and SBEZ boards**

- **May 2:** Presentation to SBCSC board served as the formal kickoff as to the future of the Zone

- **May 9th:** The Zone hosted a public forum at Navarre Middle School

- **May 15th**: The Zone Board met with the SBCSC Board of Trustees during its executive session

- **May 16th:** The Zone Board discussed the matter during public session

- **May 19th**: SBEZ provided school tours to South Bend Common Council

- **June 7th**: The Zone hosted a virtual public forum

- **June 12th**: The Zone will make a presentation to the South Bend Common Council

- **June 21st:** The SBCSC Board will formally discuss and vote to take action on the matter

- **June 26th:** The Zone Board will vote to take action on the matter