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Loudoun County School Board, Specialized Programs & Centers Committee Meeting, Tuesday, March 21, 2023

Date Tuesday, March 21, 2023
Place Loudoun County Public Schools / School Board meeting (see BoardDocs / LCPS-TV)
Length 1h 3m (video)

- Official meeting video (Vimeo / LCPS-TV): <https://player.vimeo.com/video/810597734?rel=0>
- BoardDocs (School Board): <https://go.boarddocs.com/vsba/loudoun/Board.nsf/Public>

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Speech-to-text: whisper.cpp, model large-v3-turbo. Produced 2026-10-22. Each paragraph starts with its time [HH:MM:SS] in the meeting video.

[00:00:00] and centers committee meeting I am joined by Mr. Morse and Mr. Beatty and we'll go to our first item of business which is public comment did anyone sign up for public comment do we know I could jump up no public comment thank you so we'll move to item three the approval of the draft minutes for the February 21st 2023 meeting is there a motion so moved second second so moved in second is there any discussion on the minutes seeing none all in favor of the motion to adopt the minutes please

[00:00:39] raise your hand and say aye aye that will carry three zero we'll move to our information items 401 from business and financial services Middleburg Community Charter Schools audit report Ms. Willoughby thank you so as a recap back in December I brought forward to this committee concerns regarding the audit findings and discrepancies and the ongoing concerns that that I had with Middleburg Community Charter Schools on January 10th the Loudoun County School Board approved the MCCS corrective action plan which is

[00:01:17] also included in board docs as a reference that included as part of the action LCPS performing two unannounced on-site financial audits so we have conducted the first on-site unannounced financial audit and unfortunately I wish I had better information to report the report is included in board docs as well and I will go over what that includes so one just to reiterate the scope of the report and so we had our two internal

[00:01:52] auditors go out to the school and their scope was to review the deficiencies that had been identified by the external auditor however if anything else happened to be discovered just as our external auditor in terms of what they do with their audit that they would you know report that as well so on the first page of the audit report there are is a recap of the seven items from the external auditor report and so this was the scope of what our internal audit team was reviewing so quickly we had the material misstatements requiring adjusting journal entries

[00:02:30] cash disbursements incomplete cash receipts documentation concerns regarding the bank reconciliation deposits in excess of federally insured limits posting of expenditures and unavailable and untimely produced financial information we then outline financial audit severity which is a level one level two and level three which mirrors the severity and practice in terms of how we issue letters from business and finance to our to our actual lcps schools based on what their external audit reports disclose and so the report is structured

[00:03:09] by those seven items so beginning on page two the first deficiency which was the material misstatement requiring adjusting journal entries so the check mark notes a positive improvement that there was no concern identified in terms of recording payments made by by M CCS however the fair market value the rental space has not yet been recorded and so we will note though that they have until June 30th to complete this. This typically would be a year-end entry so this is more of just a reminder

[00:03:46] and so the severity would be if this was not completed by June 30th this would be a level three and this is a level three because of the reoccurring nature of this finding. The second item which was the cash disbursements lacking proper documentation and approvals and I'll just digress really quick if I had to pick my top two out of these seven items item four regarding Baker conciliations and item two regarding the proper documentation of cash disbursements and approvals are the two highest because those really support having proper internal controls and having an

[00:04:23] environment that we lower the risk for possible fraud so unfortunately there were several items as listed under section 2 of items lacking the proper documentation or the approvals so for example there were two instances of checks over 2,500 which according to the to M CCS's own financial policies that they would have two signatures for those checks but there was only one authorized signer there was an instance where a reimbursement for the principal

[00:04:57] was approved and signed off by the principal and then several others as noted on here I won't go individually so we have what the corrective action items are next and this again just mirrors a lot of what we have been discussing all along regarding so for like that first item any checks over 2,500 should have you know two signatures approving that the principal should not be approving reimbursements to himself so we have those outlined and then the severity here is listed as a level three because again this would be one of my highest concerns this is the

[00:05:36] repetitive nature again and then the lack of controls item three incomplete cash receipts so we're happy to see that m CCS did implement a cash transmittal form however we still did discover that there was one instance where money was collected at the school and not deposited in timely manner as well as the cash receipt documentation not being uploaded into QuickBooks so the action items are listed the financial audit severity here is a level one this is a lower risk item for item number four again this was so

[00:06:13] this would be the the top of my list this is the failure to obtain proper approval of bank bank reconciliations so we are not seeing that the principal is signing off on all the bank reconciliations or approving the bank reconciliations in a proper manner. Specifically, the September bank reconciliation was completed before the end of the month and prior to receiving a bank statement. And if I could kind of put this in layman's terms, to perform a bank reconciliation, you're going to have two pieces of information.

[00:06:42] You're going to have your monthly bank statement, and then you're going to have your report from your general ledger system, and then you're going to reconcile those. Similar to your personal checkbook you would have your personal check register and your monthly bank statement you would reconcile and so specifically this there was sign off that the reconciliation had occurred prior to the receipt of the monthly bank statement so for that reason again this is a level three and I'll just to be very candid I even have like an explanation at excellent and exclamation point

[00:07:20] after it because again this really is the the backbone of trying to make sure that you've got the proper internal controls to make sure that you don't have an environment where fraud could occur number five is one of the items that was cleared and that was the deposits in excess of federally insured limits so we're happy to report that they have established the proper accounts to make sure that anytime that they have funds approaching over 250,000 that a new account is set up I'll also share that our internal auditor was very helpful in providing information and helping them set those up.

[00:08:00] Number six was inaccurate posting of expenditures. We did identify one instance where an expenditure was posted against a revenue account. This is just in accordance to what we call our gap or our generally accepted accounting principles. So the action item again there, as well as this would be a level two.

[00:08:19] and then the seventh item was cleared which is the information financial information was readily available and we appreciate their cooperation with our staff being out there so there's no further action there in summary when I look at the seven items two have been cleared three have a level three severity and two of which are of the utmost importance and then there's one item that

[00:08:50] a level two and one item that had a level one so i would again express my concern regarding the repetitive nature and the lack of controls again i know i sound like a broken a broken record but it really does set up the environment for where fraud can occur i am absolutely not suggesting that that is what is occurring but even in terms of protecting the principal and the bookkeeper at the school they would want these to even protect themselves to make sure that they do have adequate controls in place and especially just concerned because MCCS

[00:09:27] knew that we would be coming out to check and so I'm just not sure what else what else to recommend regarding making an improvement I will also briefly touch on the other items that were in the correction act the corrective action plans have all been met that where the principal and the bookkeeper are attending our monthly fast forums the principal has attended at least one monthly account manager meeting that LCPS provides the principal and bookkeeper have also intended the individual quarterly meetings and then the last item and I'm not sure if this has it has occurred but the

[00:10:04] bookkeeper was to attend the government finance officers Association accounting Academy at its earliest offering and I think that the earliest offering wasn't even going to be until later this spring so I wouldn't be surprised if that had but not been met but the other items have been met thank you for the

report back to the committee and I just when you say reoccurring this is the fifth time and my is my recollection correct that this is already in December it was the fourth so this would be the fifth time this has been brought to our

[00:10:39] attention I have the first audit begin beginning in 2018 19 20 21 22 and then this as a separate so so this is number five that you've brought this to our attention actually be six six kind of i guess five official from the external and then i guess after the letter was was sent this is would be six right so would your expectation have been that they would have met all of the items in the first with the exception of the item that isn't available

[00:11:18] to the bookkeeper yet until spring that would have been my expectation and that would be your expectation if this was at any other school as well right i pulled just in terms of wanting to make sure and I know this had come up before regarding how we manage and provide oversight to the schools that are directly under our authorization and so I looked at we do have a structure with our level one two and three and that what we do letters and require training depending on the severity so I looked at what we had for FY22 which was the last fiscal year which

[00:11:53] what we have been performing under for mcs and we had out of our 98 schools 11 schools that received a level one letter and we had three schools that received a level two letter and we had zero schools that received a level three letter and i think that i look at those numbers as evidence regarding the expectations that we expect from our schools and that the support that we also provide in that wanting to make sure that we don't have an abundance of findings or anything I

[00:12:29] also wanted to check back because knowing that I am so sensitive to the bank reconciliation and none of the deficiencies that the auditors had identified at our other 98 schools none of them were related to a bank reconciliation or the items that I would consider a higher risk thank you back in December I had suggested that it was time to put the school I believe probation was the first step is that that accurate am I remembering that correctly is it probation yes all right so I was ready in December this is very disappointing as far as I'm concerned to see that we still have any findings from

[00:13:07] you let alone the level 3 ones so I'll open it up that's where I'm at I would open it up to the other committee members to see what their opinion is unfortunately I have to agree I we have been at this a long time I've been on on the finance and or charter committee for many years and we have beat this drum.

[00:13:33] And I think our message has been consistent to the school that we must have accountability in the gap and the generally acceptable accounting procedures. And time and time again, we continue to not only miss the mark, but this was significant.

[00:13:51] I mean, there were a lot of, and you know, when I think about the audits that are being performed, I guess my question is the auditors that we're using, do they go in and are they as extensive in their audit as we were in this audit? Because my understanding is that they are going in to see if we're complying. They're not going in to do a bookkeeping check.

[00:14:20] So what I'd like to know is when our auditor who audits everything we do, when they go in, are they applying the same level of scrutiny that we're applying here? Yes, and I'll also just highlight, too, that they don't go through every transaction.

[00:14:37] They're pulling a sample. And so just to further kind of highlight the concern, because out of that sample, if you're finding things, then it just makes you wonder about what you're not testing. And this was, this was, this audit was sampling?

[00:14:55] Correct. Wow. Okay. It could be worse. It could be worse. There could be more. There's likely there is, because if we're just doing random sampling. So I don't see us making the progress that we absolutely must make.

[00:15:14] So I will support that. Mr. Beatty. Thank you. I guess a couple questions just for historical, filling this in for me. So about the fair market value, are they saying that it's too high or too low?

[00:15:32] And then how does that fit into the bookkeeping as an expense? so what had been happening is that they hadn't been reporting the fair market value and one of the things that the auditors do they they're they're testing internal controls and looking at procedures and looking at the financial reporting because if you think in the in the private world a lot of decisions are going to be made by shareholders or whatever and so the they rely on the accuracy of the financial reports and so when errors are found that impact the financial

[00:16:06] report in terms of maybe understating assets or overstating revenues for example that that becomes a concern um and so that's why that finding even though we're a public jurisdiction we're still follow the same auditing requirements and we still want to make sure we have solid financial reporting so they had not reported the fair market value of that building which would have impacted the um it was material enough to impact the financial statements i understand that My question was, are they over-reporting the rent?

[00:16:40] Are they under-reporting the rent? And again, like, how is that affecting it? Does that mean, because it... So they have until June 30th for this year to report the fair market value. What had been happening in the past several audits is that the external auditor at year-end was discovering that the entry had not been made to report the fair market value.

[00:17:02] And what was concerning about that, like the first year probably would have been a level one, But the fact that it becomes repetitive, and I'll give the example for ourselves, what I expect from the accounting team in our business financial services is any discussion or feedback that's included in the audit report, that that's where you start your fiscal year because you want to make sure that we have addressed those concerns going forward.

[00:17:30] And so I think that's where the concern is. The fact is that the repetitive nature and, I don't know how else to put it, maybe lack of attention to the detail of what needs to be done. Again, I appreciate that, but that's not my question. My question is, are they under-reporting or over-reporting?

[00:17:47] I don't understand. You said they owe \$1,000 and then they're putting \$800 to \$500 expense on the books? They weren't reporting a value of the assets at all previously, so they were under-reporting the value of their assets. So it's not an income or an expense.

[00:18:04] It is an asset. It's a balance sheet item, which comes into looking at it. I understand that the lease is a liability, but you're saying they own something and they're leasing that to someone else? Sorry. I'm going to ask our internal auditor who could probably provide some additional information.

[00:18:25] No, I understand what a fair market value is. My question is, and I guess, do they own something that they're leasing out, or are they paying for something? They pay a dollar to rent the building, but you still have to state the actual value so every year, so your books are accurate. It's a journal entry that has to be done, which in this case would be material because it's over \$260,000 that they don't have to pay, but they're getting.

[00:18:50] So that's what they're not doing. Every year over year, the external auditor is actually telling them to do the journal entry for fair market value. And I believe he performed it last year. Okay, so that is revenue, essentially, that they don't have to pay for it.

[00:19:08] Okay, that helps. Thank you. yes um and i did want to pass it over to uh to the principal and yeah well i mean i'm sure there are a lot more questions but i'm at this point i'm kind of stuck so at this point i'll mr robinson did you want to speak uh thank you so much so um i definitely agree as far as the situations from and this auto was taken from uh july 1 through december and so some of the actions some of the

[00:19:46] concerns were you know post action plan um i think excuses for the previous thing some of those things as far as they couldn't be changed so for example if reimbursement was taken for you know back in august i couldn't go back you know and fix the books or something like that to make that i guess i'd probably you know go back and actually reimburse some people as well but there's some things after the action plan was put in place in december that we couldn't go back and and change if that makes sense um stop you right there okay can staff speak to whether or not those items could have been corrected and notated in their books i believe some i believe some of them could

[00:20:26] have been corrected as well as some of them could have at least a notation addressing an awareness that that this was a concern and exactly what you were describing that maybe if it's not something that could have been corrected like if it was the month had already closed perhaps or i'm trying to think of an example but at least a notation because what also would concern me is that we're doing these individual unannounced audits but at the end of this fiscal year our external auditor would be coming in and sampling your whole entire year and could have picked the exact same samples that that we had and so without there even being a notation that you addressing that I know this is this was improperly this is how we would have done it like just something to address

[00:21:06] that this had been recognized versus it being pulled as a sample as if as just just showing um the deficient and i just want to ask a question because i was and again i was you know they were very great omar and also why they were in our in our office the whole entire time and and maybe i got a misunderstood as far as whole time as far as sampling because i could be wrong but it felt like it was going through every single act every single light item for every single from jane from july 1 through december 31st i felt like every single transaction and i'm not saying that there was not an issue here or there and that's kind of my question when i spoke to

[00:21:43] omar before and i said yeah definitely there's there's a thing that was sales tax that was reimbursed to a staff member we acknowledge that but there was many other you know reimbursements that that was that didn't take place and so from my understanding it was not just a sampling it was more like every single line i was taking was taken was observed every single because i was in my office when i was coming through was just like go through this it was like every single thing in our quickbooks was

being checked i could be wrong but that was my own personal observation that may have been the perception, but it was a sample size

[00:22:18] okay, I mean I guess, again, I can't speak to that as well, I mean I felt like it was from the, because like I said in my office we have all the binders for documentation for all transaction all that things are assigned as well and so I gave them access free access to our entire books as far as which is required, it's not a gift that you gave us, this is a requirement 100% agree with that, I signed that letter yeah, 100% agree with that And so, and again, if I'm wrong, I'm wrong.

[00:22:53] I'm not going to sit there and send that wrong. I'll be honest. I think, quite frankly, it's preposterous for you to sit there and accuse them of not being honest in how they did your audit when it is what they do every single day. And you're making excuses, and I'm going to bring it back to the committee to have further discussion.

[00:23:09] Mr. Beatty, did you have more questions? Yes, thank you, Chair. Do they have a full-time bookkeeper, or is it a part-time bookkeeper? She is part-time off-site, which is part of our action plan moving forward.

[00:23:25] And then for all the other schools, do they have full-time bookkeepers, or does it get kind of shared inside the admin building? So, again, the difference with the charter school is they have their setups differently in terms of how our other 98 schools are.

[00:23:43] So we have a staffing standard for our 98 schools to make sure that they have adequate staffing and support. And so there is there's our schools probably every single one probably has a dedicated a dedicated financial technician except for maybe some of the small elementary schools or maybe some shared responsibilities in terms of the funding as you're aware we provide funding based on their enrollment and our cost per pupil in the budget that we then that they use then to provide support for their school.

[00:24:15] So I will just say that it's at their discretion in terms of what level of support to staff their bookkeeper. Thank you. I have another question. So when your team does audits at the schools, it isn't just for a certain period.

[00:24:34] It is when an audit is performed, it's the whole year. So there should be an expectation that all of your records are going to be looked at. Absolutely. When our external auditor comes in, it's for the full year. when we assign out our internal auditors to look at specific things they're looking at the entire year I'll also just share in terms of our attention to recognizing and trying to minimize risk like a standard practice for us is anytime there's a turnover in a principal or a financial tech at a school we do an audit internally because that that opens the door for an opportunity you

[00:25:13] for risk you've got different players coming in coming out so that's like a standard operating procedure for us in terms of the importance of those two roles so in addition to that the expectation from your office would have been that anticipating that you would come for an unannounced audit that they would have gone back to July 1 and checked all of their records to ensure they were in compliance that that would have been an expectation and not an unreasonable one that is what I would have done thank you mr. Morse what was the time frame when we mentioned the fact that we were going to go back we're going to do two audits

[00:25:48] when did we make that agreement do you remember the agreement was approved by the school board on January 10th the scope of the corrective action plan does not outline that it would be like a January going forward that that would be the window of the records and I would and even if I had been brought up I would not have supported that because at the end of the day we're trying to help the charter school in preparation of the official external audit that's going to come up at the end of this fiscal year which is fast approaching and that external auditor would have been looking at the entire school year so I think we would have been doing a disservice

[00:26:25] had we limited our scope and I think of um how we limited our scope right I I'm curious as to how much of this was water under the bridge that that we I agree that we need to go back and we need to correct issues all the way back from July.

[00:26:43] But what I'm most concerned about is, is it on track? Are they doing the right thing now? Now, we can go back and we can correct the problems that were in July. Unfortunately, because we've been through this a couple cycles now, there is no real start time for when the books should have started to be corrected.

[00:27:02] I mean, you'd have to go back three, four years to the point where they should have started. But I am a little concerned that a lot of this may have been before all of the training started and the people were in place and they started looking from here forward and didn't go back to July.

[00:27:23] So I'd love to hear their thoughts on that. Before you answer that, I would like to know from staff, this training is provided every year to all bookkeepers. Is that correct? And that the charter schools are invited and included in that and to the principals? that this is something that in particular to this school because they were having findings that they would have been trained.

[00:27:43] Is that not what you told us last time? That is correct. And also we hold individual, we were holding and had been and continue to hold individual meetings, quarterly meetings, with each individual charter school, which is something that is extra above and beyond.

[00:28:01] We don't do individual meetings with our schools. So while I can appreciate the expectation and thinking of looking forward, again, I can't help but think, though, the auditor, we're discounting six months' worth of work that at minimum, again, the external auditor, you're not going to be able to explain and provide excuses.

[00:28:25] they're going to just look at the material like what what we have and without again without going backwards and even notating or acknowledging that this was something that was not handled properly we've made corrections this is how it should have been here's an addendum memo something to acknowledge that this sample item we know it's wrong but we're fixing it going forward would have would have really altered this report Mr. Robinson thank you and my

[00:29:02] apologies again I'm gonna go back in time I wasn't making any kind of assumptions about the credibility of their team they were fantastic on site as well again I'm not gonna go back make excuses that's not who I am again I believe that the things we put in place from in December after that meeting of country action um that we are on the right track that we are doing as far as the policy as far as the policies action plans um again whether in the system that I'm going to come back to my bookkeeper

[00:29:35] tomorrow as far as the going back and kind of correcting those those concerns um my my desire was to ensure that we are doing we're doing the right thing moving forward uh currently and from

the action plan which i think was very very uh insightful and also supportive and we've had a kind of conversations with the finance team over LCPS as well as our own, the person who does our audit for our school as well, and checking in, making sure that we are going by the book, making sure that we are following those plans of actions. Again, I can't speak into the future, obviously,

[00:30:13] but my desire, my intention is that the next internal audit will be a lot cleaner based on that things we've done since January 1st, after that, or either January 10th, when it was approved by the board, the things that we put in place have been corrected.

[00:30:31] Even when we had the conversation with the finance team, we asked questions to kind of get some clarity on some things. Obviously things that we were doing are not always in line with LCPS's schools because we are a charter school, so things are different as well. But I don't anticipate as far as our second internal audit to be an issue moving forward.

[00:30:53] - If this was the first time this had come back like this, I might feel a little bit differently, but this is now five audits and a surprise audit. So what would be the appropriate motion?

[00:31:09] 'Cause I intend to make the motion to put them on probation, but I'm assuming it has to be for something. What would be the appropriate language? - So I think the language we could pull directly from this item, and then you would make the motion to send it to the committee, I'm sorry, send it to the the committee would make them vote to send it to the full board for their approval so it's actually the full board that has to put a charter school on probation understood I just want to know what motion I should make right now that would cover correctly besides sending it like do I need to say

[00:31:47] for financial reasons or that's my question I would think it had to go for

[00:32:18] I do have some information from the last time from mr. Falcone kind of piecing together some information he had provided I'm thinking the motion could be in terms of placing MCCS on probation for failing to take corrective measures regarding the corrective action plan and then in terms of next steps I think that is up at your discretion and I just have to note that there had been discussion I think that the last time we brought this up about the possibility of suspension of payments I'm not sure about like the consequence piece I think

[00:32:54] that is maybe for you to fill in the blank for up to the board or would the committee make that recommendation be a board discussion yes ma'am all right so I'm going to move that the SPC committee recommend to the full school board I'm going to need a little help with the language that the can you just fill in the blank for me MCCS be put on be placed on probation for failing to take corrective measures per the corrective action plan and the date of that plan

[00:33:28] was january 10th january 10th 2023 so if we can piece that motion together for me i would appreciate it is there a second been seconded by mr morse is there any further discussion mr morse so remind me what the status of being placed on probation implies uh is there specific action items or is that all still left up to the board as well my understanding and i would want to confirm this with division council but my understanding is that it would be up to the board so given whatever the

[00:34:05] the vote is Ms. Willoughby and I would then work with Mr. Falcone to draft a letter that the board could vote on that would include terms. And with possibility for obviously discussion in what terms the board actually wants to move forward with. Yes. Okay and options I guess was the word I was looking for like what would actually be. And the last time this occurred the charter school had to submit a written

remedial plan for consideration within 30 days of being placed on probation and then the board received that remedial plan and took action after that to remove

[00:34:45] the probation okay thank you so any further discussion all in favor of the motion please raise your hand and say aye aye that will carry three zero thank you for your help getting me through the motion I appreciate it just want to make sure it was correctly documented all right we're going to move to item 402 academies of Loudoun admissions data Dr. Ellis believe you're taking this one? Thank you. Actually, before we move on to that, I do want to just acknowledge that your team behind you, Ms. Willoughby, is here to help answer questions, and thank you for

[00:35:22] the assistance and the work that you did, and I assume you'll continue to do with Middleburg, so thank you. Sorry, Dr. Ellis, I interrupted. Thank you. All right, we'll do a little changing of the guard here, and this evening, our next information item is an update on Academies of Loudoun Admissions, and with me I have Dr. Tyler from the Research Office, I have Ms.

[00:35:53] Gonzales-Sales from the High School Office, and Mr. Livesay from the Academies of Loudoun Admissions Office. And I'm going to run through a lot of data slides, I apologize in advance for doing so much talking, and then the team and I are happy to answer any questions.

[00:36:14] So we wanted to start this presentation with grounding in the strategic plan, and specifically we wanted to focus on goal one, empowering students, and even more specifically the strategic action 1.1, core academic excellence, and the strategies listed under action 1.1, as well as aligned action 1.2, multiple accessible pathways to student success.

[00:36:47] So since we last had this conversation, which we, as you all know, have done annually, we have gathered -- we've continued to gather data on the process, and we have added additional information for your review this year, including information regarding Monroe Advanced Technology Academy and JROTC.

[00:37:09] So there's a lot of data, and we really see this presentation shifting from specifically an AET and AOS data presentation to special programs more broadly as we move forward and expand special programs across the division. So the first thing you will see is demographic information for each of the last four admission cycles for AET, AOS, and MATA, including middle school representation for AET and AOS.

[00:37:38] You will not see that for MATA because AET and AOS are four-year programs starting in ninth grade, and MATA consists of one- and two-year pathways for rising juniors and rising seniors. You'll also see data broken down by economically disadvantaged students, English learners, students with disabilities, and racial groups for all three academies.

[00:38:03] The data will show you the three phases of admissions, including the first phase, the students who applied. So these are the students who completed an application for admission. This does not include the students who may have started an application and changed their mind before they finished.

[00:38:25] The next category is the students who were offered admission. And then the third category is the students who actually accepted that offer and are enrolled in the program. This last category of accepted students, we do not have for the coming 2023-24 school year.

[00:38:43] As all three of you know, having been on the board for a while, that is ever evolving until the first day of school when students show up. So students have been offered admission for the 2023-24 school

year at this point. They are in the process of accepting, and as you all know, many of these students apply to multiple special programs, and it sometimes takes them a while to choose and settle on one.

[00:39:12] And for a variety of reasons, whether they choose another program or decide that a special program is not for them, they can change their mind at any time. So we will present the accepted data for the 23-24 school year after the first of the year, the school year.

[00:39:28] So we'll start with the category of applied, the students who apply to these three programs. And we'll start with the data broken down by middle school. And again, this is a lot of information.

[00:39:45] You have these slides in front of you. I will not read the entire tables for you. And Dr. Tyler and I will just share overall themes. So one of the goals, particularly after the Attorney General's inquiry into our admissions process, was to make sure we were having an equal representation across middle schools.

[00:40:06] So we share this information for that purpose. Just a few notes, EHL is the category for students who were not enrolled in an LCPS middle school. However, students who do decide to enroll in LCPS in ninth grade can also apply to an academy.

[00:40:25] The percent is of the grand total for each category, and as you'll recall, Mercer Middle did not have an 8th grade class during the 2019-20 school year, and so that's why they are at zero right there. So you'll see overall we are moving toward more equal representation for middle schools in AET.

[00:40:50] Slide 10 shows the same information with the same notes for the Academy of Science. And then we will, so just a summary statement, student representation from the middle schools were evenly distributed in essentially all three categories for AET and AOS in 2023 compared to 2019.

[00:41:20] So before I move on to other demographic groups, I did want to start with the overall demographics of LCPS. So that is what slide 12 is, and that data is current as of March 17th when this presentation was posted.

[00:41:38] So these are the demographics and subgroups for the entire student population right now. That, as you know, changes over time, but this is just to give you sort of a place to start. So now we'll do the, this next slide is for the AET program for English learners, students with disabilities, and economically disadvantaged students.

[00:42:08] I'll pause here, and I'll mention that we're sharing the trends over time. A couple things to note. We changed the admissions process in the middle of this time period, and we also had a global pandemic.

[00:42:27] So things happened, right? The goal when we set out to change the admission process was to make it more equitably accessible for all student groups. People might say, in a perfect world, we would want the demographics of the academies to match the demographics of our overall student population.

[00:42:48] So that's sort of the North Star. So you can see that first category. Then the same information for AOS is on slide 14. And then this information on slide 15, you may not have seen before.

[00:43:14] This is the applied information for Monroe Advanced Technical Academy. So one thing I did want to point out, and Dr. Tyler wanted to point out, is that the representation of EL students, students with disabilities, and economically disadvantaged students increased among students who applied to the three programs over those series of years.

[00:43:49] So now we'll shift to racial groups. First slide is for AET, the students who applied.

[00:44:10] Similarly, this information is racial groups for students who applied to the Academy of Science. And then third, students who applied to a MATA program.

[00:44:29] And also just a reminder, there are multiple MATA programs, so this is any application to any MATA program. And then a summary statement, particularly for AET and AOS.

[00:44:46] since 2019 the representation of racial groups in the applicant pools more closely resembled the representation of racial groups in the total LCPS student population with obvious areas of continued continued areas of improvement so we're moving in the right direction we haven't necessarily reached that North Star so now we'll shift and I'll go through the same information but this time we're shifting to the students who were offered admissions so our

[00:45:21] amazing outreach and admissions team works year-round not just during the admissions process but year-round to provide recruitment and outreach opportunities for all three programs and I think you'll see the benefits of having of having all of that effort in place so this first slide is the students who were offered a seat at AET broken down by EL students with

[00:45:52] disabilities and economically disadvantaged. Of particular note you'll see the jump for our EL students and our and the big jump for our economically disadvantaged students. Slide 23 has the same information for the Academy of Science. These are students who were offered STEETS and again you'll see

[00:46:25] jumps in all three categories. So several years ago we had a hunch that many students did not know about the opportunities available to them and I think the academies admissions team would agree that that was true and their outreach efforts have really helped to to make the programs available and at least an awareness for all students so I'm really proud of the work that

[00:46:58] they've done and then this data is fascinating to me slide 24 shows the offered data for Mata students over the past four years the 2023 data isn't isn't finalized for Mata yet which is why that's not on the slide one thing that is also interesting to me is the jump in the number of students who are applying to these programs Mr. Morrison Ms. Sheridan you'll

[00:47:33] probably remember several years ago we were talking about programs that were really struggling to have participants in them at all and I believe Nettie and Joe correct me if I'm wrong this year was the first year we actually had every single program full with waiting lists for MATA yes that's accurate and it's looking like that for next few years so we're really proud about that too again awareness is is a really important first start right you can't apply to a program that you

[00:48:07] that you don't know about so just a couple summary statements the representation of EL students students with disabilities and economically disadvantaged students increased among the students who were offered admissions to AET and AOS and the representation of those groups decreased among students who were offered admissions to MATA and now we will shift to the same

[00:48:39] information broken down by racial groups so these are students who were offered a seat at AET and offered a seat at AOS I do want to point out particularly because we've had so many conversations really important sometimes very

[00:49:16] difficult conversations about black students and Hispanic students and their access to these programs again we are moving in the right direction we are pleased with that and we haven't yet reached that North Star of equal representation that mirrors representation in in the entire LCPS student body and

just just a note for you all and for the record in case anyone goes back to listen to this some people may ask why the numbers of offered the

[00:49:54] the offered numbers differ that goes back to that waiting list concept it if If people don't accept, then we continue to offer seats until they do. So if someone who received an offer but did not accept, they are still included in this count.

[00:50:12] They're just not included in the accept category. So the same information for MATA. These are students who were offered seats in MATA. Again, I wanted to point out the increase in the total number of seats offered at MATA.

[00:50:27] That's really exciting to us. And the 2022 data is pretty close to matching the demographics of the entire LCPS student body. So here's a summary of basically what I just described.

[00:50:49] I won't read that to you. So movement in the right direction and still areas of improvement. And then finally, thank you for bearing with me, we will move to the students who accepted their offers in these special programs.

[00:51:07] So this slide 31 is for AET. Pretty similar to offered. You'll see, it's pretty close. You'll see AOS, we added seats to AOS.

[00:51:24] I believe that was at Board Direction last year. So that's the jump from 126 to 150. And then MATA as well. And then finally moving to students by racial group who accepted their offers.

[00:51:54] Again, this mirrors, not mirrors, but it's very close to the numbers you saw in the offered category. progress is being made with work to do. Here it is. Slide 35 is for AOS and slide 36 is for MATA.

[00:52:21] So what do we notice? The trends and representation of groups in students who accepted offers are similar to the applied and offered categories, which is great. It means that students who were interested at first remain interested that's that's great because recruitment is working you'll also notice that the populations of students who applied were offered and accepted for AET and AOS is shifting more closely to resemble the overall population and the population

[00:53:00] of students in those categories for MATA really does pretty closely resemble the overall student population and I did want to mention before we shift and talk a little bit about our outreach and recruitment efforts I did want to share the NJROTC enrollment data by these three categories so we will continue to track this and analyze it and share it with you next year we'll also add international baccalaureate and data on our dual language immersion as well so here's the

[00:53:36] students who are enrolled in NJROTC by English learners, students with disabilities and economically disadvantaged, and also by racial group. So while this information was not part of the Attorney General's inquiry, we do think it's important to keep track of all of this admissions data moving forward. So I wanted to spend a couple minutes sharing some of our outreach and recruitment

[00:54:13] efforts, and I'll do a high-level summary, and then I'll ask Nettie and Joe if they want to add anything to this or if you have any questions for them I know they're excited to talk about it so I won't go through the entire list of outreach and recruitment efforts that have been going on and I do want to hit some of the highlights that are new this year so COVID as you know was was challenging for recruitment and outreach they had to pivot and think of unique ways to recruit students. And they did. I think we learned a lot of lessons and some of which have actually stuck

[00:54:48] even when we've returned to school. So, and we are thrilled that we're able to now provide these in-person. So we provided in-person recruiting visits with every eighth grade, eighth grader through 11th grader at each middle and high school. This team is busy all the time. They also chartered an elementary National Society of Black Engineers Junior Club for third, fourth, and fifth graders. They attended an LCPS family and community engagement night at John Champ High

[00:55:23] School. They presented at a virtual family and community engagement night at the family room that I think you saw a one LCPS spotlight on one of those a couple weeks ago. That was done in English, Spanish, and Arabic, and they provided outreach at elementary and high school PEP events throughout the fall. Additionally, they hosted outreach recruitment and admissions information sessions to K-12 family liaisons, which then enabled the family liaisons to work with the families they work with most closely to share all of that information. Again, if students don't know

[00:56:02] about a program, they won't apply to a program. They provided outreach at elementary STEM nights and elementary and middle school career days. I love that this team, we talk all the time about the timing of these recruitment and outreach efforts.

[00:56:18] By the time a student reaches eighth grade, they've already decided really what their path is gonna be and we need to get them excited in elementary school. And so those outreach and recruitment efforts, I think are really paying off. They also hosted a special education transition teacher presentation with a tour of the academies.

[00:56:36] They shared at the elementary and middle school Hour of Code event, so getting out to activities and events that are already taking place, people are already there, excited and passionate about STEM, so they have a captive audience. They also shared at a middle school Parks and Rec family night information session, and one thing that went away during COVID and we have been able to bring back is the tours of the academies for each high school, so we were excited about that.

[00:57:05] So, like I said, a small but mighty team, they are busy, busy, busy. I did want to mention briefly and for the record the resolution agreement. So, we haven't necessarily talked about this recently, and it is always top of mind, and we continue to comply with all of the provisions outlined in the February 21 resolution agreement that was provided to us by the Office of the Attorney General.

[00:57:36] That information is still posted on the superintendent's webpage for everyone to see. So what does compliance mean? It means that we continue to monitor and receive feedback from stakeholders on the admissions process for the Academies of Loudoun and for the Elementary Gifted Identification Process.

[00:57:56] We provide admissions data when it's available to the Office of the Attorney General. And we also continue to revise policies as outlined in that resolution agreement, submit the policies to the Office of Attorney General for their review. We did that last in November.

[00:58:14] I'm pleased to say they had no feedback on the policies that we submitted. And then just as a reminder, the resolution agreement is in place through June 30, 2024, so we will continue to comply with those provisions outlined in that agreement.

[00:58:30] So in terms of ongoing work related to the strategic plan, we will continue to monitor the admissions processes, again, not just in the two STEM programs at the academies, but all of our special programs.

[00:58:47] We will continue to provide data to the Office of the Attorney General. We continue to speak with the board about access and opportunities through additional special programs. We look forward to launching the pre-IB program as soon as we get designated and our two new dual language immersion programs and potentially exploring new special programs as we move forward.

[00:59:14] So with that, I will turn it over to you, Ms. Sheridan, and the team and I are happy to answer any questions. Thank you so much for the extensive presentation. We'll give you a chance to have a water break. It's really remarkable, like you said, the outreach really has paid off, and when students know about our programs, they're interested in applying, and I think it's really great.

[00:59:39] So I'll open it up to any other committee members who have questions or comments. Thank you, Madam Chair. Looking at slide, we don't have slide numbers, AET offered data. So 2019, there were 322, and then in 2022, there were only 206.

[00:59:57] is that because no one was accepting slots in the aet in 2019 because that is a huge that's a 50 drop can you say the slide i wish i could tell you the slide or the title at least aet offered data it's about uh halfway through presentation got it no offer data english learners students with disabilities economically there we go okay so 2019 you have 322 offered 2022 you only had

[01:00:35] 200 offerings does that mean nobody accepted in 2019 or is there something else at play it could yes it could mean that students were not accepting those offers but like they were in 2021 and 2022 50 though i mean could we just take a look at that just dr tyler could you see if there was anything else that you might be able to pull out of those numbers as to why that could i mean was

[01:01:10] that i didn't see those numbers at a os i didn't see those numbers at mata so some of this has to do with the number of students who apply to the academies and to thomas jefferson for example and i remember early on thomas jefferson had an offered cycle that was a month or two after hours so we would have anywhere from 25 to 30 students who would suddenly decline so we could look at students who applied to both Thomas Jefferson and our academies. And I know, I know we did have a

[01:01:46] lot of what I would call attrition early on with the large number of kids who got into both the academies of Thomas Jefferson. So yeah, if there were changes in the underlying assumptions, that would, that would help to make, make sense out of that. So in the NROTC, what we talked about was the number of that applied and they were roughly 180 to 200. What is the number of seats allocated

[01:02:12] each year for NJROTC? I couldn't be that high. That might be the whole unit. Oh, you mean seats for non-Lavon County High School? Seats for each year for NJROTC. I'll have to go back and get that number for you. Yeah, it's between 35 to 50 depending on their enrollment. And they had 187 apply yeah so we continue to struggle with the number of people interested versus what we can

[01:02:48] provide thank you any other questions or comments from the committee all right well thank you so much we look forward to seeing more numbers and the 2023 data and the progress moving forward it really has paid off all right is there any new business seeing none we are adjourned thank you all very much and have a good evening



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