APPENDIX A

1. Recommendation Report

2. Scoring Rubric

ARIZONA STATE BOARD FOR CHARTER SCHOOLS

CHARTER SCHOOL APPLICATION RECOMMENDATION REPORT 2018

NOVEMBER 16, 2018

New Charter Application for

Copper State Academy of Business and Design

Submitted by

Copper State Academy of Business and Design

Report Summary

	Recommendation:	Deny
Applicant Name:	Copper State Academy of Business and Design	
Proposed School Name:	Copper State Academy of Business and Design	

Grades Served Year 1:	9th -10th	Grades Served Year 2:	9th – 11th	Grades Served Year 3:	9th – 12th

Location:	Phoenix, between Northern Avenue and Van Buren and from Central Avenue to 44th Street.
Mission Statement:	We believe that all students have natural abilities and talents for creating sustainable solutions to real-world challenges. We provide a business and design focused curriculum that is engaging and relevant for the 21st century workplace. We provide a structured and safe learning environment that encourages all students to be entrepreneurial. We strive to impart a life-long pursuit of business and design innovations that help to make our lives and other people's lives better.

Section Scores

A substantively complete application package meets the following scoring requirements:
- No evaluation criteria receive a score of falls below the expectations; and
- No more than one evaluation area in each section is scored as approaching; and
- 95 percent of the evaluation areas in each plan (educational, operational, business) score at the meets level.

	Preliminary TRP Scores		Revised TRP Scores	
Any falls below the expectations ratings?	No		No	
More than one evaluation area in each section scored approaches?	Yes		Yes	
		Section Score		Section Score
Educational Plan Score ≥ 95%?	No	63%	No	80%
Operational Plan Score ≥ 95%?	No	77%	Yes	95%
Business Plan Score ≥ 95%?	No	85%	No	91%

In-Person Interview Summary

The Capacity Interview was attended by the following individuals. Both their current and future roles are listed.

- Mrs. Pamela Houlden - Authorized Representative, Charter Principal, Proposed School Director
- Mr. Mark Houlden – Charter Principal, Proposed Director of Operations and Management
- Mrs. Anne Ferraioli – Charter Principal, Proposed Chair of Student Opportunities

Pamela Houlden answered the bulk of the questions with the other two team members interjecting information as was appropriate to the question. Prior to the interview, the TRP had significant concerns about the lack of a curriculum, the overload of work that will be placed on the teaching staff, and the lack of leadership experience from the team members. The TRP's questions to address these concerns were asked, clarified when not addressed by the Applicant and then reworded to help the Applicant understand exactly what we were attempting to discover through their answer. Information was gathered from these answers, but nothing was addressed to a deep level that would convince the TRP that the Applicant had the

knowledge or capacity to operate this charter school.

During the closing statement, Mrs. Houlden indicated that they believed in Copper State and helping students be prepared for life after high school. (Capacity Interview 1:12:35). She also indicated they were excited about the possibilities and the opportunities they will be able to offer the students that are not offered anywhere else in the target population area.

TRP Qualitative Analysis Summary

The TRP recommends that the application for Copper State Academy of Business and Design be denied because neither the educational plan nor the business plan met the criteria, even through the revision and resubmission phase of the process. The educational plan lacks specific information regarding the curriculum; specifically, there is very little information regarding the possible curriculum that will be utilized. The bulk of the responsibility for development of the school curriculum will rest on the shoulders of the teaching staff. Additionally, the business plan does not provide sufficient information to conclude that the Applicant is able to operate this business model with any degree of success.

While the philosophy and mission statement of the proposed charter school are sound and the target population is well defined, the educational plan does not identify a curriculum, nor does it identify possibilities that are being considered. The Applicant did discuss the curriculum during the Capacity Interview and noted that they had looked at Springboard from College Board. Essential questions are written for each subject area and the curriculum must be able to answer those questions and address the state standards. Mrs. Houlden indicated that they were in the process of researching options. (Capacity Interview 10:11 – 25:50) Because there is no specific curriculum, the bulk of curriculum design work will fall on the teachers. The Academic Systems Plan loosely defined the process in which curriculum will be developed. This process is heavily weighted on the teachers, from development of curriculum maps, extensive lesson plans, leadership reports, and updating interactive notebooks. This method is not setting the teachers, students, or charter school up for success.

While the operations plan met the criteria with the resubmission of the application, there are still concerns about the leadership capacity of the team. Mr. Houlden has three years of experience as a Dean of Students in a local school, but Mrs. Houlden's only semi-administrative experience is leading the accreditation team for a high school. While this is an important task, it does not make one qualified to take on the role of School Director.

The Applicant has begun the process of recruiting for school governing board members. Presently, the Corporate Board is acting as the governing board, which is not uncommon at this point in the application process, but it does not appear that there is much solid movement towards securing individuals to fill specific needs on the governing board. Since the Applicant team does not have needed experience in the areas of leadership, finance, or business practices, it would be beneficial to have individuals secured for these roles. During the Capacity Interview it was noted by Mrs. Ferraioli that they were reaching out to local businesses with one commitment from a small business owner and a commitment from an ASU professor. (Capacity Interview 41:00 – 45:17)

The business plan did not meet the criteria during either submission. The concerns in this area include the lack of understanding about the facility costs to bring a building up to specifications, the thought process surrounding ways in which to cut expenses if needed, and the budget, which has calculation errors.

The Applicant was indecisive during the Capacity Interview regarding the cost of bringing this building up to the specifications described in Section C.1 of the application. There was no additional funding added in the Start-up budget for building and land improvements. The Applicant assumed that these costs are taken care of by the owner. Mr. Houlden indicated that he has made some assumptions about repairs and innovations of the building so he has now added money into the budget for these costs. (Application Section C.4 Revised Page 9) (Capacity Interview 38:26 – 41:00) This lack of knowledge and experience on the part of the Applicant team is problematic moving forward.

When asked what would happen if the actual student enrollment on the first day of school is 50% of the projection, the answer provided did not promote confidence on the part of the TRP. Mr. Houlden responded that he and Mrs. Houlden would have to take on teaching roles and trim the fat off the budget. It was also discussed that when teacher evaluations had to be completed they might have to hire a substitute teacher to fill in so Mrs. Houlden could do that part of her job. While Mr. Houlden did state that he would surround himself with good people so that all necessary jobs could be completed, the overall answer was not sufficient. (Capacity Interview 32:00 – 38:26)

Educational Plan

	Preliminary TRP Scores			Revised TRP Scores		
Educational Plan Score ≥ 95%?	No	26	of	41	No	33	of	41
Number of "Falls Below" ratings	0			0		
Number of "Approaches" ratings	15			8		

Plan Summary

The Applicant intends to serve a racially diverse target population of students looking for a high school experience in the business and design area who will leave high school prepared for entry-level positions, post-secondary education and with the ability to pursue business opportunities. This charter school will be located in the East/Central area of Phoenix in the ZIP codes of 85008, 85014, 85016, and 85018. (Revised Application Section A.2 page 2) The proposed charter school will serve students in grades 9 and 10 in year one and add an additional grade level until they offer a full high school experience. The educational philosophy is to provide real world experiences within the classroom by providing students with the opportunity to gain knowledge in the business and design arenas. An Interactive Notebook will be utilized to provide students an opportunity to create a portfolio of their learning. (Application Section A.3 Revised, pages 7 – 8) The school calendar is traditional in that students will attend school 180 days. The daily schedule is different in that the delivery is based on a trimester schedule in which students take 5 courses each day and change courses three times during the year. The school day is 6.5 hours long with Wednesday being less than 5 hours to allow teachers time for professional development. The curriculum plan is vague at best. Essential questions will be created for each grade level/subject area that will guide the selection of curriculum. Assessment will be woven throughout the curriculum to monitor the Success Expectations of the students. There is no mention of AzMERIT exams in the application. (Application Section A.5 Revised, pages not numbered)

Analysis

The educational plan approaches the criteria for approval because the Applicant fails to define a curriculum plan or to tie this curriculum to the philosophy and mission of the charter school. Because there is no specific curriculum defined, except to note that the Applicant stated during the Capacity Interview that they were looking at Springboard from College Board, it is difficult to determine how the needs of this student population, relative to a business and design education, will be met. (Capacity Interview 16:11 – 22:20) According to Mrs. Houlden, essential questions have been developed for each subject and the chosen curriculum must be used to answer these questions and address the state standards. (Capacity interview 22:20 – 25:50)

The TRP has major concerns about the number of responsibilities asked of the teaching staff and the time it will take to complete these tasks well. When asked during the Capacity interview the Applicant stated that there is an early release day once a week where professional development (PD) will occur. This PD will include an agenda planned by the School Director. After the PD, the Director will conduct weekly walkthroughs to monitor whether the subjects learned in PD were being implemented in the classroom. The TRP asked the question again and it was said that teachers will have 30 minutes of office hours after school each week to meet with students. When these teachers meet with students they must keep a log of the student concerns. Additionally, teachers will have one prep hour a day that they can use however they see fit. Without a well-defined curriculum, teachers would likely struggle to completely develop the curriculum, plan daily lessons, fill out the Leadership Reports required of each teacher by the school leaders, and look at the Interactive Notebooks from their students. Responsibilities for instructional planning, rigor, assessment and management are outlined in the Program of instruction. These requirements would be daunting even to a seasoned teacher. (Application Section A.3 Revised Pages 6 – 10)

Operational Plan

	Preliminary TRP Scores			Revised TRP Scores		
Operational Plan Score ≥ 95%?	No	17	of 22	Yes	21	of 22
Number of "Falls Below" ratings	0			0		
Number of "Approaches" ratings	5			1		

Plan Summary

The corporate board and school governing body will be separate entities upon the opening of the charter school and the recruitment of individuals for specific roles on the governing body is complete. During the planning phases, the corporate board will operate as the school governing body. The organizational structure consists of the corporate board overseeing all operations with the governing board responsible for the School Director. The Director is directly responsible for the other school leaders and the teaching staff. Contracted services will be utilized for the following areas: Special Education, legal, internet and communications, custodial services and business consultants.

Analysis

The operational plan meets the criteria for approval because the applicant's organizational structure is

explained in detail in the application. (Application Section B.1 Revised) The separation of the corporate and governing boards is discussed, with the two boards acting as one during the planning phases. There is concern regarding definitive individuals who will make up the composition of the school governing board. While the Applicant has discussed the possibility of certain people being members of the board, there is only stated commitment from a small business owner and an ASU professor. Finding qualified individuals with the necessary skill sets to sit on a school governing body is difficult, and the Applicant does not seem to have made much progress in this very important area. (Capacity Interview 43:00 – 45:17)

The Applicant has delineated the areas in which outside vendors will be necessary. The preferred qualifications of individuals within each area are listed along with estimated costs. There are companies named in the application that are possible sources as vendors, with most having had experiences within the charter sector.

There is a serious lack of leadership experience among the leadership team. The Proposed Director has little leadership experience outside of leading the accreditation team for her school. (Application Section B.3 Pages 7-8) While this is an important role, it in no way compares to the day to day operations of a charter school. Each member of the team claims to be ready to open a charter school. However, outside of Mr. Houlden spending three years as the Dean of Students at a local school, there are no experiences that would make the team members qualified for the positions they will be occupying. (Application Section B.3 Pages 7 – 15) The corporate board is comprised of the three individuals that will operate this school. With little experience in these endeavors and no other members on the corporate board with valid experience, this does not present itself as a successful endeavor.

Business Plan

	Preliminary TRP Scores			Revised TRP Scores		
Business Plan Score ≥ 95%?	No	28	of 33	No	30	of 33
Number of "Falls Below" ratings	0			0		
Number of "Approaches" ratings	5			3		

Plan Summary

Proposed Location: East/Central Phoenix with boundaries of Central Ave to 44th St between Northern and Van Buren

Facilities Requirements: Within the first three years of operation, the Applicant will need ten general education classrooms, two art studios, an incubator lab, a multipurpose room, restroom and reception area for a total of 16,850 square feet. The art studios will be located in a separate building from the general education facilities.

Budget Summary

	Startup Period	Year 1	Year 2	Year 3
Projected Enrollment:	0	200	275	350
Total Revenue:	200,000	1,168,176.75	1,697,906.52	2,309,295.70
Total Expenditures:	177,287.25	1,163,604.23	1,402,349	1,768,183.64
Ending Balance:	22,712.25	4,572.52	295,558.02	541,112.06

The Applicant has identified a geographic area in which to locate the charter school and has provided a timeline that assumes the facility will be ready for occupancy in July 2019. Projected enrollment figures indicated on the cover page begin with 200 students in year one and growing to 300 in year 3. The budget is built on the assumption that 75% of these target numbers will enroll each year. A marketing plan consists of the Applicant attending local events to distribute promotional flyers, going door to door, and a social media presence in order to meet the goal of enrollment of 150 students in year one. The Applicant indicated during the Capacity interview that a model classroom will be set up so that people can come for a tour in hopes of signing up for attendance. (Capacity interview 47:45 – 52:45) Recruitment of teachers will be conducted by the corporate board members with the intention of all individuals being in place by July 1, 2019. Teachers will be sought for their expertise in business and their ability to bring real world situations into the classroom.

Analysis

The business plan approached the criteria for approval because of the calculation errors in the budget, and the fact that the Applicant failed to include the cost of building improvements in the start-up budget. While the Applicant presented conservative budgets, there are still some concerns about the overall depth of knowledge related to the inner workings of a charter school.

During the Capacity interview a question was asked about the cost of renovations/improvements to an acquired facility. Mr. Houlden indicated he made some assumptions about repairs and innovations being included in the lease so he had not included funding for that in the budget. After the application was submitted he did add these costs to the budget. (Capacity interview 38:26 – 41:00) This type of mistake supports the thoughts of the TRP about the lack of capacity to operate a school.

During the opening remarks, Mrs. Houlden indicated that the decision was made to open a charter school with her experience in business and teaching students how to open a business, along with Mr. Houlden's art experience it seemed natural to offer a program that is not offered anywhere in Phoenix. (Capacity interview 05:15 – 07:04)

The Applicant team was asked what would be done if enrollment was only 50% of projections. Mr. Houlden indicated that he and Mrs. Houlden would have to take on teaching roles with the idea to make sure everything else gets done, even if it means working very long hours. (Capacity interview 32:00 – 38:26) This answer demonstrates the Applicant's lack of knowledge of the inner workings of a charter school – the many reports that must be done, ensuring teachers are being supported and students are being monitored.

Because of the lack of leadership capacity within the finance area, it is difficult to make the assumption that this endeavor would have a positive outcome. Additional experiences with school leadership as well as budget and finance would be beneficial.

Evidence of Capacity

Applicant Summary

Name	Role	Attended Interview?
Pamela Houlden	Charter Principal, Charter Representative and Proposed School Director	Yes
Mark Houlden	Charter Principal, Proposed Director of Operations and Management	Yes
Anne Ferraioli	Charter Principal, Proposed Chair of Student Opportunities	Yes

Analysis

The TRP concluded through the reading of the application, the revision, and conducting the Capacity Interview that the Applicant seriously lacks the leadership capabilities and overall management skills and knowledge to open and operate this charter school. There is little leadership experience amongst the proposed school leaders and without information concerning individual members of the school governing board and the specific skill sets they bring to the organization, it is difficult to determine whether the board could effectively govern this school.

The proposed School Director failed to sufficiently answer the questions asked about curriculum, assessment and teacher workload. (Capacity Interview 25:52 – 32:00) Additionally, the proposed Director of Operations and Management did not fully address the questions regarding the acquisition of facilities and the activities that would take place if enrollment was significantly lower than expected. (Capacity Interview 32:00 – 41:00)

The Capacity interview demonstrated the scattered thought processes of the Applicant. When asked to explain the roles and responsibilities of the founders now and how they will change when the school opens, Mrs. Houlden discussed her job as director as making sure teachers have what they need and that all activities evolve around the mission. She discussed ECAP which is a state mandated process by which high school students track their courses, extra-curricular activities, college prep test scores and other aspects of planning for post-high school years. At no other time during the interview was ECAP discussed, and very little information was given in the written application. Each member of the Applicant team took the opportunity to respond to the steps that would need to be taken to ensure the school was ready to open on time. No team member discussed the recruitment of teachers until asked. (Capacity Interview 1:09:50) This oversight speaks volumes about the capacity of this team to open and operate a successful charter school.

CONSENSUS REVISED SUBSTANTIVE REVIEW RUBRIC FOR THE ASBCS 2019-2020 CYCLE

Applicant Group	Copper State Academy of Business and Design
Proposed School Name	Copper State Academy of Business and Design

REVISED APPLICATION RATINGS					
Part A	**Educational Plan**				
A.1	Educational Philosophy	F	A	M	Technical Assistance / Comments
A.1a	Provide a clear and comprehensive overview of the school's philosophical approach, describing how students will learn and what the teacher's role in that learning will be.			1	Meets the Criteria
A.1b	Incorporate the elements fundamental to the school's program of instruction.			1	Meets the Criteria
A.1c	Include a mission statement that is clear, cohesive, comprehensive and has a focus on outcomes rather than inputs.			1	Meets the Criteria
A.1d	Articulate how the school's educational philosophy is aligned with the mission statement of the proposed school.			1	Meets the Criteria
A.1e	Present a rationale that clearly supports how the selected approach improves pupil achievement in the target population, including research and/or experience.			1	Meets the Criteria
A.1f	Ensure the mission statement on the Target Population Page is consistent with the narrative.			1	Meets the Criteria
A.1 Total		0	0	6	
A.2	Target Population	F	A	M	Technical Assistance / Comments
A.2a	Identify the target population consistent with the information provided on the Target Population Page, demonstrating a clear understanding of the students and community the school intends to serve, including current levels of academic performance of the surrounding schools.			1	Meets the Criteria
A.2b	Present an explanation of how the implementation of the program of instruction described in A.3 meets the needs of the target population including improving pupil achievement and providing educational choice.		1		Revised submission addresses criteria, but lacks sufficient detail in: Providing details explaining how the school's proposed program of instruction improves pupil achievement in the target population. Providing details explaining how the school's proposed program of instruction improves educational choice in the target population.
A.2c	Describe the class size and teacher-student ratios and clearly explain how these address the needs of the target population for improved pupil achievement and educational choice.			1	Meets the Criteria
A.2 Total		0	1	2	
A.3	Program of Instruction	F	A	M	Technical Assistance / Comments
A.3a	Describe the curriculum for the core academic content areas, which clearly demonstrates alignment to the Educational Philosophy and Arizona State Standards.		1		Revised submission addresses criteria, but lacks sufficient detail in: Describing the curriculum for core academic content area(s): ELA, Math, Science and Social Studies. Clearly demonstrating alignment of the curriculum to the Educational Philosophy in core area(s): ELA, Math, Science and Social Studies.
A.3b	Demonstrate clear understanding of methods of instruction key to the program of instruction, including formative assessment strategies, which clearly demonstrate alignment to the curriculum, assessments, and Educational Philosophy.		1		Revised submission addresses criteria, but lacks sufficient detail in: Demonstrating understanding of methods of instruction key to the program of instruction. Demonstrating understanding of methods of instruction which clearly demonstrate alignment to the curriculum, assessments, and Educational Philosophy.
A.3c	Present a rationale for the selected curriculum, methods of instruction and assessment that support improving pupil achievement in the target population.		1		Revised submission addresses criteria, but lacks sufficient detail in: Presenting a rationale for the selected curriculum that supports improving pupil achievement in the target population. Presenting a rationale for the methods of instruction that supports improving pupil achievement in the target population. Presenting a rationale for the assessment that supports improving pupil achievement in the target population.

		F	A	M	
A.3d	Explain how the Program of Instruction will result in achieving the outcomes described in the school's mission.			1	Meets the Criteria
A.3e	Ensure the Program of Instruction is consistent with the Academic Systems Plan.			1	Meets the Criteria
A.3 Total		0	3	2	
A.3.2	Course Offerings and Graduation Requirements	F	A	M	Technical Assistance/ Comments
A.3.2a	Identify graduation requirements for the school that will meet A.R.S. 15-701.01.			1	Meets the Criteria
A.3.2b	Describe a comprehensive viable and adequate process that includes clear criteria and conditions for awarding course credit.			1	Meets the Criteria
A.3.2c	Provide a rationale for the selected criteria and conditions for awarding course credit and how they represent student capacity to pass the end of the course State assessments.			1	Meets the Criteria
A.3.2.d	Provide a menu of course offerings which include course titles and brief descriptions of classes consistent with State requirements and clearly demonstrate alignment to the Program of Instruction.			1	Meets the Criteria
A.3.2.e	Ensure consistency with the program of instruction and alignment with the Business Plan as presented in the application package.			1	Meets the Criteria
A.3.2 Total		0	0	5	
A.4	School Calendar and Weekly Schedule	F	A	M	Technical Assistance / Comments
A.4a	Provide the length of the school day (approximate start and dismissal times) and how many minutes will be designated for each core academic subject that clearly demonstrate compliance with hours/minutes of instruction for each grade level served for the proposed school calendar (standard or extended) pursuant to A.R.S. 15-901.			1	Meets the Criteria
A.4b	Include a school calendar with the total number of days the proposed school will be in session, early-release days, scheduled holidays and additional days off.			1	Revised Submission Meets the Criteria
A.4c	School calendar clearly demonstrates compliance with A.R.S. 15-341.01.			1	Meets the Criteria
A.4d	Provide a rationale for the selected weekly schedule that clearly supports improving pupil achievement in the target population.			1	Revised Submission Meets the Criteria
A.4e	Identify professional development opportunities consistent with the information provided in Area IV of the Academic Systems Plan.			1	Meets the Criteria
A.4 Total		0	0	5	
A.5	Academic Systems Plan	F	A	M	Technical Assistance / Comments
A.5a	Provide predicted target figures for Percent Passing in Mathematics and Reading aligned with target population information provided in Section A.2			1	Revised Submission Meets the Criteria
A.5b	Provide a clear description of the basis for setting baseline figures that aligns with Section A.2.			1	Meets the Criteria

A.5c	Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive curriculum system (Area I): i. Adoption of curriculum aligned to Arizona State Standards; • adopting new and supplemental curriculum, • gathering curriculum options, • evaluating proposed curriculum programs and materials, and • verifying the curriculum is aligned to Arizona State Standards. ii. Implementation of curriculum to include; • integrating curriculum into instruction consistently, and • implementing the curriculum with fidelity to the design of the curriculum and program of instruction. iii. Evaluation of curriculum to include; • determining if curriculum is effective based on criteria set by the school, • ensuring that the curriculum allows students to meet the standards, • verifying whether curriculum is aligned to student needs, and • identifying if a curricular gap is preventing the students from mastering a standard. iv. Revision of curriculum to include; • making revisions to existing curriculum, and • replacing/supplementing existing curriculum through adoption of new curriculum. v. Adaptation to address the curriculum needs of subgroup populations by; • ensuring that implemented curriculum and supplemental curriculum meet the identified needs of students in subgroups.	1	Revised submission addresses criteria, but lacks sufficient detail in: Providing sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive curriculum system (Area I): iv. Revision of curriculum; • making revisions to existing curriculum, and • replacing/supplementing existing curriculum through adoption of new curriculum.
A.5d	Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive assessment system to assess student performance (Area II): i. Developing the assessment system; • creating a data collection system that involves both formative and summative assessments, • ensuring the assessment system is aligned to the curriculum, and • the instructional methodology/program. ii. Analyzing assessment data; • students are performing, • whether instructional methodology and curriculum are meeting the needs of all students, and • what adjustments are made when methodology and/or curriculum are not meeting student needs. iii. Adapted to meet the needs of subgroups; • evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group. iv. Year to Year comparison; • determine what data will be collected to allow for valid and reliable comparisons of student growth and proficiency • determine the analysis completed during the year to allow for valid and reliable comparisons from year to year.	1	Revised submission addresses criteria, but lacks sufficient detail in: Providing sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive assessment system to assess student performance (Area II): i. Developing the assessment system; • creating a data collection system that involves both formative and summative assessments, • ensuring the assessment system is aligned to the curriculum ii. Analyzing assessment data to include; • students are performing, • whether instructional methodology and curriculum are meeting the needs of all students, and • what adjustments are made when methodology and/or curriculum are not meeting student needs. iii. Adapting to meet the needs of subgroups; • specifically evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group. iv. Year to Year comparison; • determining what data will be collected to allow for valid and reliable comparisons of student growth and proficiency • determining the analysis completed during the year to allow for valid and reliable comparisons from year to year.

A.5e	Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive system for monitoring instruction (Area III): i. Monitoring instruction; • gathering evidence to ensure that the classroom instruction is aligned with standards, • identifying if the instruction is taking place in the manner prescribed by curriculum planning documents, • verifying if the instruction allows students to effectively master state standards, and • ensuring that adjustments are made to the curriculum for students in subgroup populations. ii. Evaluating instructional practices; • integrating curriculum into instruction consistently, and • implementing the curriculum with fidelity to the design of the curriculum and program of instruction. iii. Evaluation of curriculum to include; • gathering evidence to evaluate the effectiveness of instructional practices for all instructional staff, • using criteria to clearly measure instructional quality, and • disaggregating teacher evaluation data to identify strengths, weaknesses and needs of individual teachers. iv. Adapted to meet the needs of subgroups. evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group. Providing feedback that develops the quality of teaching and standards integration; • analyzing the information gathered in the teacher evaluation process in order to provide feedback specific to each individual staff member on their quality of teaching and standards integration.	1		Revised submission addresses criteria, but lacks sufficient detail in: Providing sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive system for monitoring instruction (Area III): i. Monitoring instruction; • verifying if the instruction allows students to effectively master state standards, and ii. Evaluating instructional practices; • integrating curriculum into instruction consistently, and • implementing the curriculum with fidelity to the design of the curriculum and program of instruction. iv. Providing feedback that develops the quality of teaching and standards integration; • analyzing the information gathered in the teacher evaluation process in order to provide feedback specific to each individual staff member on their quality of teaching and standards integration.
A.5f	Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive professional development system (Area IV): i. Developing the professional development plan; • determining what PD topics will be covered throughout the year and • deciding what data and analysis will be used to make those decisions. ii. Supporting high quality implementation; • supporting high quality implementation of PD strategies by providing support and • allocating resources such as time, space, and the necessary material items required for implementation. iii. Monitoring implementation and follow-up; • monitoring that the strategies learned in professional development are implemented, and • following up with instructional staff regarding levels of implementation. iv. Adapted to meet the needs of subgroups; • determining what topics are addressed during PD to meet the needs of subgroups.	1		Meets the Criteria
A.5g	Identify the frequency and/or timing sufficient for the timely completion of the action steps as part of a comprehensive system in each Area.		1	Revised Submission Meets the Criteria
A.5h	Identify concrete documentation that will serve as evidence to demonstrate completion of all components of each action step.		1	Revised Submission Meets the Criteria
A.5i	Provide adequate personnel resources responsible for completing action steps that support the Areas. Identify the title/role/positions of the individual(s).	1		Revised submission addresses criteria, but lacks sufficient detail in: Providing adequate personnel resources responsible for completing action steps that support Area 2 regarding development of the school curriculum and implementation of assessments.
A.5j	Be consistent with all sections of the application package		1	Meets the Criteria

		F	A	M	
A.5 Total		0	4	6	
A.6.9-12	9-12 Grade Span Instructional Analysis				Technical Assistance/Comments
A.6.9-12a	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. **1. Learning Target:** Identify the objectives students must know that align with the Required Standard and can be assessed to demonstrate mastery of the Required Standard.			1	Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.9-12b	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. **2. Prior Knowledge:** List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning target.			1	Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.9-12c	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. **3. Instructional Plan:** Describe the process for presenting new information, necessary for students to meet the learning targets. Describe the instructional strategies used to lead students to meet each of the learning targets identified.			1	Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.9-12d	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. **4. Instruction:** Describe the activity/tasks students will complete to meet the learning targets. Identify components of the program of instruction and educational philosophy that are incorporated into instruction.			1	Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.3.9-12e	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. **5. Formative Assessment:** List criteria for determining whether students have met each of the learning targets.			1	Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.9-12f	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. **6. Summative Assessment:** Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard.			1	Revised Submission Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.9-12g	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. **7. Remediation:** Describe the processes available to provide support to students that do not meet the learning targets.			1	Revised Submission Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.9-12 Total		0	0	7	
	Part A Sub Total	0	8	33	
Part B	**Operational Plan**				
B.1	Applicant Entity	F	A	M	Technical Assistance / Comments
B.1a	Describe in detail the Applicant's history, including its establishment, evolution, and how operating a charter school became part of its mission as documented in the minutes or resolution of intent to apply for a charter school.			1	Meets the Criteria
B.1b	Provide a clear and cohesive organizational chart and narrative that clearly delineates the roles, responsibilities, and reporting structure for each position on the chart.			1	Meets the Criteria
B.1c	Clearly describe any subsidiary relationship of the Applicant entity to another organization.			1	Meets the Criteria
B.1d	Identify any current or prior charter operation by the Applicant, and any Principal, including the authorizer, timeframe, and nature of involvement.			1	Revised Submission Meets the Criteria
B.1e	Discuss the role of each Principal in the entity. Clearly describe the qualifications of each Principal to support the Education Plan, Operational Plan, and/or Business Plan.			1	Revised Submission Meets the Criteria
B.1f	Be consistent with the background information documents provided for each individual.			1	Meets the Criteria
B.1g	Ensure consistency with legal documentation establishing entity, including number of directors required by Bylaws.			1	Meets the Criteria

		F	A	M	Technical Assistance / Comments
B.1h	Ensure consistency with information listed on Title Page and the contents of the application package.			1	Meets the Criteria
B.1 Total		0	0	8	
B.2	Governing Body	F	A	M	Technical Assistance / Comments
B.2a	Clearly identify the specific roles and the responsibilities of the school governing body as per A.R.S. §15-183 (E)(8).			1	Meets the Criteria
B.2b	Clearly indicate if the corporate board for Applicant will also act as the school governing body, or if and when a school governing body separate from the corporate board will be established.			1	Meets the Criteria
B.2c	Describe how the composition of the school governing body will have the capacity to fulfill its requirements and supports the school's mission.		1		Revised submission addresses criteria, but lacks sufficient detail in: Providing a description of the school governing body's capacity to fulfill its requirements and support the school mission.
B.2d	Describe a clear and appropriate process for selecting initial governing body members and filling vacancies that result in selecting a governing body qualified to fulfill its responsibilities.			1	Meets the Criteria
B.2e	Be consistent with all sections of the application package.			1	Meets the Criteria
B.2 Total		0	1	4	
B.3	Management and Operation	F	A	M	Technical Assistance / Comments
B.3a	Provide an organizational chart and clearly delineate the roles and responsibilities of each position on the chart as it pertains to administering the day-to-day activities of the school.			1	Meets the Criteria
B.3b	Present a comprehensive viable and adequate operational plan that includes oversight responsibilities related to instruction and operational services. Plan must identify the number of administrative personnel (each year for the first three years) and their oversight responsibilities related to the following areas: i. Instruction, ii. Curriculum and Assessment (mandated State testing), iii. Staff Development, iv. Financial Management, v. Contracted Services, vi. Personnel, vii. Grants Management, and viii. Student Information System (SIS).			1	Revised Submission Meets the Criteria
B.3c	Identify critical skills or experience that will indicate the minimum qualification for fulfillment of those responsibilities.			1	Meets the Criteria
B.3d	Be consistent with all sections of the application package.			1	Revised Submission Meets the Criteria
B.3 Total		0	0	4	
B.3.2	Contracted Services	F	A	M	Technical Assistance / Comments
B.3.2a	Delineate all areas, for which the Applicant plans to contract with a service provider.			1	Meets the Criteria
B.3.2b	Identify the minimum professional qualifications and/or experience expected of those to be retained to perform each listed contracted service.			1	Meets the Criteria
B.3.2c	Provide clear and specific sources for costs of each listed contracted services.			1	Meets the Criteria
B.3.2d	Describe how the costs associated with each listed contracted service are viable and adequate for the target population identified in A.2.			1	Meets the Criteria
B.3.2e	Ensure costs are described in the Budget Assumptions and included in the Start-Up and Three-Year Operational Budget as appropriate.			1	Meets the Criteria
B.3.2 Total		0	0	5	
	Part B Sub Total	0	1	21	
Part C	**Business Plan**				
C.1	Facilities Acquisition	F	A	M	Technical Assistance / Comments

		F	A	M	
C.1a	Identify a timeframe for securing an appropriate facility consistent with the Target Start Date identified on the Target Population Page.			1	Meets the Criteria
C.1b	Identify and describe the facility necessary to implement the program. Include square footage, number of classrooms, layout of space (floor plan), and location that will accommodate the number of anticipated students and class size as identified throughout the application package.			1	Meets the Criteria
C.1c	(For a planned location only): Identify and provide documentation on available facilities within the target market that will allow implementation of the program of instruction and support the student population and class size described in the application package.			1	Meets the Criteria
C.1c-c	Ensure the Layout of Space is consistent with the narrative.			1	Meets the Criteria
C.1c-d	Ensure costs as described in the narrative accounted for in the Start-Up and Three-Year Operational Budgets and fully described in the Assumptions.			1	Meets the Criteria
C.1c-e	Be consistent with all sections of the application package.		1		Revised submission addresses criteria, but lacks sufficient detail in: Ensuring consistency with section A.2 of the application package regarding boundaries.
C.1 Total		0	1	5	
C.2	Marketing and Student Enrollment	F	A	M	Technical Assistance / Comments
C.2a	Provide a viable and adequate timeframe for recruiting students consistent with the start-up date of the proposed school identified on the Target Population Page.			1	Meets the Criteria
C.2b	Provide a clear and comprehensive plan that is viable and adequate to support the number of students included in the Three-Year Operational Budget.			1	Meets the Criteria
C.2c	Provide clear and specific sources for costs associated with the marketing plan.			1	Revised Submission Meets the Criteria
C.2d	Describe how the costs associated with the marketing plan are viable and adequate to attract the projected student population identified in Year 1 of the Three-Year Operational Budget.			1	Meets the Criteria
C.2e	Ensure costs as described in the narrative are accounted for in the Start-Up and Three-Year Operational Budgets and fully described in the Budget Assumptions.			1	Meets the Criteria
C.2f	Describe the proposed fair and equitable admission requirements and documents required in the enrollment packet.			1	Meets the Criteria
C.2g	Describe the enrollment procedures compliant with A.R.S. §15-184, including the timeframe, process used if capacity is insufficient to enroll all students, and documentation collected for student registration once a student is admitted to the school.			1	Meets the Criteria
C.2h	Identify the enrollment targets, including the minimum and maximum projected enrollment at each grade level that will be set, and how these targets were determined.			1	Meets the Criteria
C.2 Total		0	0	8	
C.3	Personnel	F	A	M	Technical Assistance / Comments
C.3a	Provide a clear and comprehensive staffing plan, including the minimum professional qualifications and/or experience for each position.			1	Meets the Criteria
C.3b	Describe how the staffing plan is adequate for the effective implementation of the program of instruction and operation of the charter school as described, including: • the grades and number of students to be served in each of the first three years of operation, and			1	Meets the Criteria
C.3c	Provide a detailed plan to recruit, hire, and train instructional staff consistent with the start-up of the school.			1	Meets the Criteria
C.3d	Describe how the process for recruiting initial instructional staff and the identified salaries in the Three-Year Operational Budget result in a staff qualified to effectively implement the program of instruction.			1	Meets the Criteria

		F	A	M	
C.3e	Ensure all salaries and Employee Related Expenses (ERE) described in the narrative are accounted for in the Start-Up and Three-Year Operational Budgets and fully described in the Budget Assumptions.			1	Meets the Criteria
C.3 Total		0	0	5	
C.4	Start-Up Budget	F	A	M	Technical Assistance / Comments
C.4a	List only sources of start-up revenue fully supported by Verifiable Proof of Secured Funds documentation.			1	Meets the Criteria
C.4b	List expenditures to cover the start-up plans described in the application package.			1	Meets the Criteria
C.4c	Demonstrate through the assumptions that the amounts listed are viable and adequate.			1	Meets the Criteria
C.4d	Ensure revenues cover expenditures.			1	Meets the Criteria
C.4e	Ensure that timeframes described in all sections of the application package are consistent with timeframes listed on the Start-Up Budget.			1	Meets the Criteria
C.4f	Be consistent with all sections of the application package.			1	Meets the Criteria
C.4 Total		0	0	6	
C.5	Three-Year Operational Budget	F	A	M	Technical Assistance / Comments
C.5a	List expenditures to cover the Educational Plan, Operational Plan, and Business Plan described in the application package.			1	Revised submission addresses criteria, but lacks sufficient detail in: Expenditures listed in the budget related to Operations and Management appear insufficient to cover student technology, land and improvements, and building improvements, as described in the Three-Year Operational Plan Assumptions in the application package.
C.5b	Ensure state equalization detailed in Projected Revenue Calculator is consistent with the Target Population and the student count by grade level.			1	Meets the Criteria
C.5c	(If student count add-ons are used in determining projected revenue) Provide an adequate rationale for using the student count add-on levels in the Projected Revenue Calculator in the assumptions that is consistent with the target population described in Section A.2.			1	Meets the Criteria
C.5d	Provide an adequate rationale for the percent of full enrollment used as the basis of the budget for Year 1 consistent with Section C.2.			1	Meets the Criteria
C.5e	Demonstrate through the assumptions that the amounts listed are viable and adequate.			1	Meets the Criteria
C.5f	If operational revenue is used to pay for expenses incurred during the start-up period, clearly describe in the assumptions the sources of costs and repayment terms.			1	Revised Submission Meets the Criteria
C.5g	Ensure revenues cover expenditures.			1	Meets the Criteria
C.5h	Be consistent with all sections of the application package.		1		Revised submission addresses criteria, but lacks sufficient detail in: Ensuring consistency with section C.5 Operational Budget of the application package regarding accuracy of computations.
C.5 Total		0	2	6	
	Part C Sub Total	0	3	30	
Grand Total	Parts A, B, and C	0	12	84	
SUMMARY	No scoring area in Part A, B, or C received a score of Falls Below				
	More than one scoring area in each section scored Approaches				
	Educational Plan Fails 95% Test				
	Operational Plan Meets 95% Test				
	Business Plan Fails 95% Test				
CONCLUSION	Fails to Meet the Criteria, Therefore Substantively Incomplete				

Note: C.5a has value 1 in the A column, and C.5h has value 1 in the A column.