

# **APPENDIX A**

- 1. Recommendation Report**
- 2. Scoring Rubric**

ARIZONA STATE BOARD FOR CHARTER SCHOOLS

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# CHARTER SCHOOL APPLICATION RECOMMENDATION REPORT 2018

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**NOVEMBER 14, 2018**

*New Charter Application for*

**Kaleidoscope School**

*Submitted by*

**Integrated Education Foundation, Inc.**

# Report Summary

<b>Recommendation:</b>					Deny
<b>Applicant Name:</b>		Integrated Education Foundation, Inc.			
<b>Proposed School Name:</b>		Kaleidoscope School			
<b>Grades Served Year 1:</b>	K-3	<b>Grades Served Year 2:</b>	K-4	<b>Grades Served Year 3:</b>	K-5
<b>Location:</b>	Applicant has listed three potential sites in the Northwest section of Phoenix				
<b>Mission Statement:</b>	Within an innovative and creative model of elementary education, Kaleidoscope School inspires and prepares students to be competent, confident learners equipped with the critical thinking, problem solving, literacy, and numeracy skills necessary for success in an increasingly complex, global society.				

## 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.

	<u>Preliminary TRP Scores</u>		<u>Revised TRP Scores</u>	
Any falls below the expectations ratings?	Yes		No	
More than one evaluation area in each section scored approaches?	Yes		Yes	
		Section Score		Section Score
Educational Plan Score ≥ 95%?	No	55%	Yes	98%
Operational Plan Score ≥ 95%?	No	45%	No	91%
Business Plan Score ≥ 95%?	No	75%	Yes	100%

## In-Person Interview Summary

Corporate Board Members:

Laura Brasher

Marissa Anderson

Robin Soare

All three charter principals, along with three board members were present in the interview. The co-founder, Robin Soare, was the primary speaker, but each member of the team contributed by providing details according to their area of expertise. The TRP initially had serious concerns about all three plans during the initial

evaluation of the written application, but the Applicant demonstrated its ability to present a much-improved revised application. However, after the interview, strong concerns resurfaced about the Applicant’s operations and business capacity. (Capacity Interview 14:11). During the capacity interview, the Applicant could not explain in detail a viable contingency plan in the event the projected enrollment amount was not met. Coupled with this fact, that their model is based on having two teachers in each classroom. No strategic solution was provided to ensure that the model could be upheld in the event the projected enrollment numbers were not met. (Capacity Interview 14:11) Also, no timeline was provided to have principal to step down from being an active board chair. (Capacity Interview 21:30) Furthermore, there appears to be an inconsistency with the Applicant’s rationale for setting up a charter school in the targeted area. The Applicant indicates that this is so that parents can have a choice of sending their children to their “A” ranked school in an area where the schools are predominately “A” & “B”. The targeted area has 9 traditional elementary schools and 4 charter schools, 5 of which rank “A”. (Educational Plan, A2: Target Population, Page 3)

**TRP Qualitative Analysis Summary**

The TRP recommends that the revised application package for Integrated Education Foundation, Inc. be denied because the lack of proper planning in the operational plan. These inadequacies will have serious repercussions affecting the other two plans; therefore, it does not meet the Board’s criteria for approval.

Critical issues related to Educational Plan:

The Applicant intends to utilize an existing private school to start-up a charter school and provide free public education. The model chosen heavily depends on recruitment of two highly qualified teachers in each classroom that are well versed in their chosen model. Neither a strategic and aggressive recruitment plan to obtain the required personnel nor a well-structured process for training teachers for the chosen model was presented.

Critical issues related to Operational Plan:

The TRP had serious concerns about the proposed governance structure. No timeline was provided as to when the founder/board member (Robin Soare) would step down from being the board chair when consecutively performing the duties of acting principal of the school.

Critical issues related to Business Plan:

The Applicant’s response to not having a realistic contingency plan in the event the projected enrollment amount was not sufficient. No details were provided to demonstrate that the model chosen could be kept in place if enrollment projections were not met.

**Educational Plan**

	Preliminary TRP Scores				Revised TRP Scores			
Educational Plan Score ≥ 95%?	Yes	55	Of	56	Yes	54	of	55
Number of “Falls Below” ratings	0				0			
Number of “Approaches” ratings	1				1			

**Plan Summary**

The Applicant proposes to serve students in grades K-8, with the first year serving K-3, the second year serving K-4, and the third year serving K-5. Each subsequent year increases one grade level as they reach capacity.

67% of the target population is comprised of white collar workers, with 33% being blue collar workers. The total

number of children ages 5 to 14 in this population is 7,880. (Educational Plan, A2: Target Population, Page 3)

The Applicant's educational philosophy is to employ fully integrated curricula, with all content taught as part of one thematic unit. The school will gradually incorporate thematic units, beginning the first year with units based in math and science as well as language arts and social studies. Students will be placed in cooperative learning groups based on data obtained from previous year's teacher as well as the portfolio that follows that student. The groups will put like-minded students together, which allows students to proceed at an individualized pace. (Educational Plan, A1: Educational Philosophy, Page 8)

The school day will be from 8:00 am to 3:15 pm, with 5.5 and 6.25 hours of instruction per day, based on grade level on full days, and 3 hours of instruction per day on half days. Hours of instruction per year is as follows:

Kindergarten	990 hrs.
First	990 hrs.
Second	990 hrs.
Third	1,035 hrs.
Fourth	1,035 hrs.
Fifth	1,035 hrs.
Sixth	1,035 hrs.
Seventh	1,035 hrs.
Eighth	1,035 hrs.

Kaleidoscope school will have 180 days of school for the calendar year 2019/2020. (Educational Plan, A4: School Calendar and Weekly Schedule, Page 1)

The Applicant proposes to implement a research-based curriculum that is aligned to its educational philosophy and Arizona State Standards. The school will utilize Core Knowledge, Singapore Math, Excellence in Writing, Easy Grammar, novel studies, Spalding, Wordly Wise, and teacher created curriculum.

The Applicant proposes to use summative assessments, benchmark assessments, and state testing to determine the effectiveness of the curriculum, the teachers, and the instructional strategies for student learning. This data, along with the formative assessment data, will be reviewed and analyzed to determine adjustments to curriculum, teacher placement, professional development, and instructional strategies to further increase student achievement. (Educational Plan, A4: Program of Instruction, Page 5)

## Analysis

The educational plan falls below the criteria for approval because the Applicant failed to adequately demonstrate that the proposed program is sustainable through their operational and business plans, and because the TRP has concerns of capacity. The Applicant failed to demonstrate during the capacity interview that they have sufficient capacity to implement the planned academic program so that it increases academic performance in the target population. While the application does describe a number of positive core values and general instructional approaches, these approaches and values are not sufficiently linked to the target population. (Capacity Interview, 25:07).

## Operational Plan

	Preliminary TRP Scores				Revised TRP Scores			
Operational Plan Score $\geq$ 95%?	No	#20	of	#26	No	20	of	22
Number of "Falls Below" ratings	3				0			
Number of "Approaches" ratings	3				2			

## Plan Summary

Integrated Education Foundation, Inc. is governed by a single Board of Directors (the "Board") which serves as the sole governing body of Kaleidoscope School (the "School"), and is charged with overseeing the management of the School's affairs including all operational, financial, and pedagogical issues. Pursuant to, ARS §15-183(E) (8), the Board will set direction based on the mission and vision of the School. (Operational Plan, B2: Governing Body, Page 6)

Responsibilities and the role of official governing board positions are provided in detail (Operational Plan, B2: Governing Body, Pages 2-6)

Contracted services will be proposed and evaluated by the Business Manager and approved by the Governing Board. The following is a list of contracted services the School intends to use:

Audits – Conduct all state-required audits

Benefits – Provide employees Health insurance, Dental insurance, and Retirement

Copier – Provide and maintain copiers for school

ESS – Provide Special Education services needed at school, to include ESS Teacher, school psychologist services, OT services, speech language services, and PT services

Facility Services – Provide facility maintenance and cleaning

Finance Services – Provide accounting, tax preparation, compliance services, budget reports, payroll, accounts payable, monthly cash flow statements, and annual financial report

Food Services – Provide students with on-site lunches

Information Technology Services – Network set-up and installation, computer maintenance (both software and hardware), and web development and maintenance

Insurance – Provide property and liability insurance which includes risk management and extra-curricular injury

Legal Services – Provide legal services and guidance in tax and regulatory issues

(Operational Plan, B.3.2: Contracted Services, Pages 1-2)

## Analysis

The operational plan falls below the criteria for approval because the TRP has critical concerns about its current board structure. The Applicant provided organizational charts for the first three years. The roles and responsibilities of the board and each projected position were presented. However, the fact that the board chair has not presented a timeframe for stepping down while also serving as principal was lacking.

It is unclear whether the school can implement with fidelity the chosen model of instruction without having a well-structured recruitment and training plan. Furthermore, the Applicant does not have a solid contingency plan in the event projected enrollment falls short of expectations. The TRP's level of concern increased when during the capacity interview when it was stated that if in such an event where enrollment projections fall short, that parent volunteers would be used to off-set contracted services (Capacity Interview, 14:11)

The TRP believes the Applicant requires further development of its board structure and process, in addition to development of an aggressive recruitment and rigorous training plan in order for all criteria under the operational plan can be successfully met.

# Business Plan

	Preliminary TRP Scores			Revised TRP Scores		
Business Plan Score ≥ 95%?	Yes	33	of 33	Yes	32	of 32
Number of “Falls Below” ratings	0			0		
Number of “Approaches” ratings	0			0		

## Plan Summary

**Proposed Location:** 2929 W. Greenway, Phoenix  
 2806 W. Cactus, Phoenix, AZ 85029  
 13454 N. Black Canyon Highway, Phoenix, AZ 85029.

**Facilities Requirements:** Year One  
 Integrated Education Foundation, Inc. (IEF) will need a facility to house a projected 180 students its first year. The facility must have a minimum of 6 general education classrooms, 2 special classrooms (rotating music, Spanish, art and computers), 2 administrative offices, 1 office entry area, 1 ESS room, 1 teacher resource room, 1 multi-use room, and enough restrooms and drinking fountains to satisfy the number of children and adults at the school. IEF will need a total of 65 interior square feet per child, for a total of 11,700 sq. ft. in its first year.

Year Two  
 IEF’s student population is projected to be 240 students in year two. In order to deliver IEF’s Program of Instruction IEF will need 8 classrooms, 2 special classrooms (rotating music, Spanish, art and computers), 2 administrative offices, 1 entry area, 1 ESS room, 1 teacher room, 1 multi-use room, and enough restrooms and drinking fountains to satisfy the number of children and adults at the school. IEF will need a total of 65 interior square feet per child, for a total of 15,600 interior sq. ft. in its second year.

Year Three  
 The third year student projection is 300 students. IEF will need 10 classrooms, 2 special classrooms (rotating music, Spanish, art and computers), 2 administrative offices, 1 office entry area, 1 ESS room, 1 teacher room, 1 multi-use room, and enough restrooms and drinking fountains to satisfy the number of children and adults at the school. IEF will need a total of 65 interior square feet per child, for a total of 19,500 interior sq. ft. in its third year.

## Budget Summary

	Startup Period	Year 1	Year 2	Year 3
Projected Enrollment:		180	240	300
Total Revenue:	150,000.00	1,124,431.25	1,398,460.00	2,014,290.21
Total Expenditures:	98,654.75	1,062,685.00	1,539,095.25	1,782,453.04
Ending Balance:	51,345.25	61,746.25	140,635.21	231,837.17

The business plan included three facility options all located within the targeted area. A timeline for securing the facility and projected facility costs are also included. All three options include a plan for growth through the first three years of operation. (Business Plan, C.1: Facilities Acquisition, Pages 1-13)

The Applicant proposed a marketing plan and budget to encourage enrollment through press releases, traditional advertising, non-traditional advertising, a webpage, social media, and soft marketing practices. (Business Plan, C.2: Marketing and Enrollment, Pages 1-4)

The personnel plan provided details in describing professional qualifications and experience for each projected position. A recruitment plan and hiring process were included. Teacher training and professional development

were proposed as well. (Business Plan, C.3: Personnel, Pages 5-10)  
 The start-up budget included employees, insurance, office supplies, and other maintenance and operations costs. (Business Plan, C.4: Start Up Budget Pages 1-2). Revenue calculations for the three year operational budget are based on 33% for the first year, 44% for the second year, and 55% for the third year.

**Analysis**

The business plan falls below the criteria for approval because there was no clear contingency laid out in the event enrollment projections were to fall at or below 50% of the expectations. (Capacity Interview 14:11) The lack of a detailed realistic contingency plan jeopardizes severely the implementation and sustainability of the model chosen since it is heavily dependent on having two teachers and an instructional aide in each classroom. A sound financial strategic plan should be in place allocating sufficient funds with a reasonable projection anticipating any challenges that the school may face. The TRP finds the Applicant lacks the capacity in the financial planning that is necessary to launch a charter school.

**Evidence of Capacity**

**Applicant Summary**

Name	Role	Attended Interview?
Laura Brasher	Charter Principal	Yes
Marissa Anderson	Charter Principal	Yes
Robin Soare	Charter Principal and Authorized Representative	Yes

**Analysis**

The TRP finds that the Applicant has combined experience in operating a private school. In reviewing the written application and interviewing the Applicant, the TRP concludes that the absence of some critical elements in three plans would hinder the ability of the Applicant to launch a successful charter school. These elements include a clearly defined target population and its needs so that an education plan can be designed and proposed to address the specific needs of the target population; a timely, effective board structure so that an operational plan can be executed; and a sound, strategic business plan so that sufficient funds can be allocated to support an effective implementation of its academic program. In summary, the TRP recommends that the Applicant continues to further increase its capacity to secure a favorable charter contract at a later time.

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

<b>Applicant Group</b>	Integrated Education Foundation, Inc.
<b>Proposed School Name</b>	Kaleidoscope School

REVISED APPLICATION RATINGS						
Part A	Educational Plan	F	A	M	Technical Assistance / Comments	
A.1	Educational Philosophy				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	Revised Submission Meets the Criteria	
A.1b	Incorporate the elements fundamental to the school's program of instruction.			1	Revised Submission Meets the Criteria	
A.1c	Include a mission statement that is clear, cohesive, comprehensive and has a focus on outcomes rather than inputs.			1	Revised Submission Meets the Criteria	
A.1d	Articulate how the school's educational philosophy is aligned with the mission statement of the proposed school.			1	Revised Submission 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	
<b>A.1 Total</b>		<b>0</b>	<b>0</b>	<b>6</b>		
A.2	Target Population				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	Meets the Criteria	
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	
<b>A.2 Total</b>		<b>0</b>	<b>0</b>	<b>3</b>		
A.3	Program of Instruction				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 Meets the Criteria	
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 Meets the Criteria	
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 Meets the Criteria	
A.3d	Explain how the Program of Instruction will result in achieving the outcomes described in the school's mission.			1	Revised Submission Meets the Criteria	
A.3e	Ensure the Program of Instruction is consistent with the Academic Systems Plan.			1	Meets the Criteria	
<b>A.3 Total</b>		<b>0</b>	<b>0</b>	<b>5</b>		
A.3.1	Mastery and Promotion				Technical Assistance / Comments	
A.3.1a	Present clear criteria and conditions for promotion from one level to the next, to include the level of proficiency that students must obtain to demonstrate mastery of academic core content.			1	Meets the Criteria	
A.3.1b	Describe a comprehensive viable and adequate process the school will use to determine grade-level promotion and retention consistent with A.R.S. 15-701.			1	Revised Submission Meets the Criteria	

A.3.1c	Present a rationale for the selected criteria and conditions that guide the grade level promotion decisions.			1	Meets the Criteria
A.3.1d	Describe the process for student retention.			1	Meets the Criteria
A.3.1e	Ensure consistency with Area II of the Academic Systems Plan.			1	Meets the Criteria
<b>A.3.1 Total</b>		<b>0</b>	<b>0</b>	<b>5</b>	
<b>A.3.2</b>	<b>Course Offerings and Graduation Requirements</b>	<b>F</b>	<b>A</b>	<b>M</b>	<b>Technical Assistance/ Comments</b>
A.3.2a	Identify graduation requirements for the school that will meet A.R.S. 15-701.01.				NOT APPLICABLE
A.3.2b	Describe a comprehensive viable and adequate process that includes clear criteria and conditions for awarding course credit.				NOT APPLICABLE
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.				NOT APPLICABLE
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.				NOT APPLICABLE
A.3.2.e	Ensure consistency with the program of instruction and alignment with the Business Plan as presented in the application package.				NOT APPLICABLE
<b>A.3.2 Total</b>		<b>0</b>	<b>0</b>	<b>0</b>	
<b>A.4</b>	<b>School Calendar and Weekly Schedule</b>	<b>F</b>	<b>A</b>	<b>M</b>	<b>Technical Assistance / Comments</b>
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	Revised Submission 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	Revised Submission Meets the Criteria
A.4d	Provide a rationale for the selected weekly schedule that clearly supports improving pupil achievement in the target population.			1	Meets the Criteria
A.4e	Identify professional development opportunities consistent with the information provided in Area IV of the Academic Systems Plan.			1	Revised Submission Meets the Criteria
<b>A.4 Total</b>		<b>0</b>	<b>0</b>	<b>5</b>	
<b>A.5</b>	<b>Academic Systems Plan</b>	<b>F</b>	<b>A</b>	<b>M</b>	<b>Technical Assistance / Comments</b>
A.5a	Provide predicted target figures for Percent Passing in Mathematics and Reading aligned with target population information provided in Section A.2			1	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	<p>Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive curriculum system (Area I):</p> <p>i. Adoption of curriculum aligned to Arizona State Standards;</p> <ul style="list-style-type: none"> <li>• adopting new and supplemental curriculum,</li> <li>• gathering curriculum options,</li> <li>• evaluating proposed curriculum programs and materials, and</li> <li>• verifying the curriculum is aligned to Arizona State Standards.</li> </ul> <p>ii. Implementation of curriculum to include;</p> <ul style="list-style-type: none"> <li>• integrating curriculum into instruction consistently, and</li> <li>• implementing the curriculum with fidelity to the design of the curriculum and program of instruction.</li> </ul> <p>iii. Evaluation of curriculum to include;</p> <ul style="list-style-type: none"> <li>• determining if curriculum is effective based on criteria set by the school,</li> <li>• ensuring that the curriculum allows students to meet the standards,</li> <li>• verifying whether curriculum is aligned to student needs, and</li> <li>• identifying if a curricular gap is preventing the students from mastering a standard.</li> </ul> <p>iv. Revision of curriculum to include;</p> <ul style="list-style-type: none"> <li>• making revisions to existing curriculum, and</li> <li>• replacing/supplementing existing curriculum through adoption of new curriculum.</li> </ul> <p>v. Adaptation to address the curriculum needs of subgroup populations by;</p> <ul style="list-style-type: none"> <li>• ensuring that implemented curriculum and supplemental curriculum meet the identified needs of students in subgroups.</li> </ul>		1	Meets the Criteria
A.5d	<p>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):</p> <p>i. Developing the assessment system;</p> <ul style="list-style-type: none"> <li>• creating a data collection system that involves both formative and summative assessments,</li> <li>• ensuring the assessment system is aligned to the curriculum, and</li> <li>• the instructional methodology/program.</li> </ul> <p>ii. Analyzing assessment data;</p> <ul style="list-style-type: none"> <li>• students are performing,</li> <li>• whether instructional methodology and curriculum are meeting the needs of all students, and</li> <li>• what adjustments are made when methodology and/or curriculum are not meeting student needs.</li> </ul> <p>iii. Adapted to meet the needs of subgroups;</p> <ul style="list-style-type: none"> <li>• evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group.</li> </ul> <p>iv. Year to Year comparison;</p> <ul style="list-style-type: none"> <li>• determine what data will be collected to allow for valid and reliable comparisons of student growth and proficiency</li> <li>• determine the analysis completed during the year to allow for valid and reliable comparisons from year to year.</li> </ul>		1	Revised Submission Meets the Criteria

A.5e	<p>Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive system for monitoring instruction (Area III):</p> <p>i. Monitoring instruction;</p> <ul style="list-style-type: none"> <li>gathering evidence to ensure that the classroom instruction is aligned with standards,</li> <li>identifying if the instruction is taking place in the manner prescribed by curriculum planning documents,</li> <li>verifying if the instruction allows students to effectively master state standards, and</li> <li>ensuring that adjustments are made to the curriculum for students in subgroup populations.</li> </ul> <p>ii. Evaluating instructional practices;</p> <ul style="list-style-type: none"> <li>integrating curriculum into instruction consistently, and</li> <li>implementing the curriculum with fidelity to the design of the curriculum and program of instruction.</li> </ul> <p>iii. Evaluation of curriculum to include;</p> <ul style="list-style-type: none"> <li>gathering evidence to evaluate the effectiveness of instructional practices for all instructional staff,</li> <li>using criteria to clearly measure instructional quality, and</li> <li>disaggregating teacher evaluation data to identify strengths, weaknesses and needs of individual teachers.</li> </ul> <p>iv. Adapted to meet the needs of subgroups.</p> <ul style="list-style-type: none"> <li>evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group.</li> </ul> <p>v. Providing feedback that develops the quality of teaching and standards integration;</p> <ul style="list-style-type: none"> <li>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.</li> </ul>			1	Revised Submission Meets the Criteria
A.5f	<p>Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive professional development system (Area IV):</p> <p>i. Developing the professional development plan;</p> <ul style="list-style-type: none"> <li>determining what PD topics will be covered throughout the year and</li> <li>deciding what data and analysis will be used to make those decisions.</li> </ul> <p>ii. Supporting high quality implementation;</p> <ul style="list-style-type: none"> <li>supporting high quality implementation of PD strategies by providing support and</li> <li>allocating resources such as time, space, and the necessary material items required for implementation.</li> </ul> <p>iii. Monitoring implementation and follow-up;</p> <ul style="list-style-type: none"> <li>monitoring that the strategies learned in professional development are implemented, and</li> <li>following up with instructional staff regarding levels of implementation.</li> </ul> <p>iv. Adapted to meet the needs of subgroups;</p> <ul style="list-style-type: none"> <li>determining what topics are addressed during PD to meet the needs of subgroups.</li> </ul>			1	Revised Submission 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	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	Meets the Criteria
A.5j	Be consistent with all sections of the application package			1	Meets the Criteria
<b>A.5 Total</b>		<b>0</b>	<b>0</b>	<b>10</b>	
A.6.K-2	K-2 Grade Span Instructional Analysis	F	A	M	Technical Assistance/Comments

A.6.K-2a	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. <b>1. Learning Target:</b> 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, and Mathematics.
A.6.K-2b	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. <b>2. Prior Knowledge:</b> List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.			1	Meets the Criteria Reading, Writing, and Mathematics.
A.6.K-2c	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. <b>3. Instructional Plan:</b> 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, and Mathematics.
A.6.K-2d	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. <b>4. Instruction:</b> 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, and Mathematics.
A.6.K-2e	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. <b>5. Formative Assessment:</b> List criteria for determining whether students have met each of the learning targets.			1	Meets the Criteria in Reading, Writing, and Mathematics.
A.6.K-2f	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. <b>6. Summative Assessment:</b> 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	Meets the Criteria in Reading, Writing, and Mathematics.
A.6.K-2g	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. <b>7. Remediation :</b> Describe the processes available to provide support to students that do not meet the learning targets.			1	Meets the Criteria in Reading, Writing and Mathematics.
A.6 Total		0	0	7	
A.6.3-5	3-5 Grade Span Instructional Analysis	F	A	M	Technical Assistance/Comments
A.6.3-5a	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>1. Learning Target:</b> 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 Reading, Writing, Mathematics, and Science.
A.6.3-5b	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>2. Prior Knowledge:</b> List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.			1	Meets the Criteria Reading, Writing, Mathematics, and Science.
A.6.3-5c	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>3. Instructional Plan:</b> 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.6.3-5d	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>4. Instruction</b> : 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, Mathematics, and Science.  Addresses the criteria, but lacks sufficient detail in: Describing the activity/tasks students will complete to meet the learning targets in Writing. Specifically, activities/tasks identifying each learning target. Activities/tasks adequately addressing the rigor of the standard. Identifying components of the program of instruction and education philosophy that are incorporated into Writing instruction.
A.6.3-5e	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>5. Formative Assessment</b> : List criteria for determining whether students have met each of the learning targets.			1	Revised Submission Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.3-5f	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>6. Summative Assessment</b> : 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.6.3-5g	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>7. Remediation</b> : 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.
<b>A.6.3-5 Total</b>		<b>0</b>	<b>1</b>	<b>6</b>	
A.6.6-8	<b>6-8 Grade Span Instructional Analysis</b>				Technical Assistance/Comments
A.6.6-8a	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>1. Learning Target</b> : 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.6.6-8b	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>2. Prior Knowledge</b> : 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.6.6-8c	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>3. Instructional Plan</b> : 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	Revised Submission Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.6-8d	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>4. Instruction</b> : 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.6.6-8e	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>5. Formative Assessment</b> : List criteria for determining whether students have met each of the learning targets.			1	Meets the Criteria in Reading, Writing, Mathematics, and Science.
A.6.6-8f	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>6. Summative Assessment</b> : 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.6.6-8g	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. <b>7. Remediation:</b> 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.
<b>A.6.6-8 Total</b>		0	0	7	
	<b>Part A Sub Total</b>	0	1	54	
<b>Part B</b>	<b>Operational Plan</b>				
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	Revised Submission 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	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
B.1h	Ensure consistency with information listed on Title Page and the contents of the application package.			1	Meets the Criteria
<b>B.1 Total</b>		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		Revised submission addresses criteria, but lacks sufficient detail in: Indicating if the corporate board for Applicant will also act as the school governing body or indicating if and when a school governing body separate from the corporate board will be established.
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	Revised Submission Meets the Criteria
B.2e	Be consistent with all sections of the application package.			1	Revised Submission Meets the Criteria
<b>B.2 Total</b>		0	2	3	
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	Meets the Criteria
B.3c	Identify critical skills or experience that will indicate the minimum qualification for fulfillment of those responsibilities.				1	Revised Submission Meets the Criteria
B.3d	Be consistent with all sections of the application package.				1	Revised Submission Meets the Criteria
<b>B.3 Total</b>		<b>0</b>	<b>0</b>	<b>4</b>		
B.3.1	Education Service Providers	F	A	M		Technical Assistance / Comments
B.3.1a	Present a detailed explanation of how contracting with or having a governance relationship with the ESP: • allows the Applicant to fulfill its mission and implement its program of instruction, and • meets the identified needs of the target population including improving pupil achievement.					NOT APPLICABLE
B.3.1b	Provide relevant performance data for other schools that the ESP has managed that demonstrates the ESP's success in implementing the program of instruction and improving pupil achievement in a comparable population.					NOT APPLICABLE
B.3.1c	Provide a clear description of the services to be provided by the ESP consistent with the service agreement.					NOT APPLICABLE
B.3.1d	(CMOs only) Ensure that the relationship between the ESP and Applicant entity described in the narrative is clearly consistent with the Articles of Incorporation and Bylaws in Section B.1.					NOT APPLICABLE
B.3.1e	(EMOs only) Provide an explanation for the reasons for contracting with an ESP, in general, and this provider in particular, and how the ESP will further the school's mission and program.					NOT APPLICABLE
B.3.1f	(EMOs only) Describe the Applicant's performance expectations for the ESP consistent with the service agreement, and a viable and adequate plan for how the Applicant will evaluate that performance.					NOT APPLICABLE
B.3.1g	(EMOs only) Describe the ESP's roles and responsibilities in relation to the Applicant consistent with the service agreement.					NOT APPLICABLE
B.3.1h	Ensure ESP-related costs are described in the Budget Assumptions and included in the Start-Up and Three-Year Operational Budget as appropriate.					NOT APPLICABLE
<b>B.3.1 Total</b>		<b>0</b>	<b>0</b>	<b>0</b>		
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	Revised Submission Meets the Criteria
B.3.2c	Provide clear and specific sources for costs of each listed contracted services.				1	Revised Submission 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	Revised Submission 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	Revised Submission Meets the Criteria
<b>B.3.2 Total</b>		<b>0</b>	<b>0</b>	<b>5</b>		
<b>Part B Sub Total</b>		<b>0</b>	<b>2</b>	<b>20</b>		

Part C		Business Plan			
C.1	Facilities Acquisition	F	A	M	Technical Assistance / Comments
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	Revised Submission 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-a	(For an already acquired facility, purchased land or proposed build only) Identify costs associated with securing the facility and ensuring compliance with all applicable laws and regulations including obtaining educational occupancy.				NOT APPLICABLE
C.1c-b	(For an already acquired facility, purchased land or proposed build only): Describe any financial arrangements that have been made for securing the facility.				NOT APPLICABLE
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	Meets the Criteria
<b>C.1 Total</b>		<b>0</b>	<b>0</b>	<b>6</b>	
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	Revised Submission 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	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	Revised Submission 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	Revised Submission Meets the Criteria
<b>C.2 Total</b>		<b>0</b>	<b>0</b>	<b>8</b>	
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: <ul style="list-style-type: none"> <li>• the grades and number of students to be served in each of the first three years of operation, and</li> <li>• the number of each type of instructional and non-instructional personnel each year.</li> </ul>			1	Revised Submission 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
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
<b>C.3 Total</b>		<b>0</b>	<b>0</b>	<b>5</b>	
C.4	<b>Start-Up Budget</b>	F	A	M	<b>Technical Assistance / Comments</b>
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	Revised Submission 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
<b>C.4 Total</b>		<b>0</b>	<b>0</b>	<b>6</b>	
C.5	<b>Three-Year Operational Budget</b>	F	A	M	<b>Technical Assistance / Comments</b>
C.5a	List expenditures to cover the Educational Plan, Operational Plan, and Business Plan described in the application package.			1	Meets the Criteria
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.				NOT APPLICABLE
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	Revised Submission 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	Meets the Criteria
<b>C.5 Total</b>		<b>0</b>	<b>0</b>	<b>7</b>	
	<b>Part C Sub Total</b>	<b>0</b>	<b>0</b>	<b>32</b>	
<b>Grand Total</b>	<b>Parts A, B, and C</b>	<b>0</b>	<b>3</b>	<b>106</b>	
<b>SUMMARY</b>	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 Meets 95% Test				
	Operational Plan Fails 95% Test				
Business Plan Meets 95% Test					
<b>CONCLUSION</b>	<b>Fails to Meet the Criteria, Therefore Substantively Incomplete</b>				