

APPENDIX A

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

ARIZONA STATE BOARD FOR CHARTER SCHOOLS

CHARTER SCHOOL APPLICATION RECOMMENDATION REPORT 2018

NOVEMBER 12, 2018

New Charter Application for

Somerset Academy of Arizona

Submitted by

Somerset Academy Arizona, Inc.

Report Summary

Recommendation: Approve					
Applicant Name:		Somerset Academy Arizona, Inc.			
Proposed School Name:		Somerset Academy of Arizona			
Grades Served Year 1:	K-3	Grades Served Year 2:	K-4	Grades Served Year 3:	K-5
Location:	6340 Sunset Dr South Miami, FL 33143				
Mission Statement:	The mission of Somerset Academy of Arizona is to maximize student achievement and foster the development of responsible, self-directed life-long learners in a safe and enriching learning environment; correlating with the vision to provide an equitable, high-quality education for all students.				

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		No	
		Section Score		Section Score
Educational Plan Score ≥ 95%?	No	89%	Yes	98%
Operational Plan Score ≥ 95%?	No	79%	Yes	100%
Business Plan Score ≥ 95%?	No	84%	No	94%

In-Person Interview Summary

Present for the interview representing the Applicant were all five listed Board Members (Lourdes Isla Marrero, Todd German, Ana Diaz, Tony Morales, and Taylor Smith) and a representative from the EMO (Francisco Mestre). The TRP’s issues to address for this interview were about budget assumptions, especially related to recruitment and how the program of instruction addressed the target population. Based on the Applicant’s responses, all of these concerns were addressed, as detailed below. Beginning at 1:07:00 the Applicant provided concluding statements that spoke to the capacity of the team to implement the proposed plan from both their experiences in growing to, and operating in other communities, and the human impact from the perspective of a graduate of their program.

TRP Qualitative Analysis Summary

The TRP recommends that the application for Somerset Academy of Arizona be approved because the Educational and Operational plans both met the criteria for approval. The Business plan did not meet the criteria for approval during the substantive review of the revised application package; however, further details provided during the interview answered all concerns the TRP had during its review, and gave it confidence that the Business plan is sufficient.

The Applicant’s educational plan meets the criteria for approval, materials were mostly complete, and adequately summarized the target population, grades, philosophy, schedules, and assessment systems. The sole area rated “approaches,” was adequately explained during the interview. It is clear how the program of instruction will meet the needs of the target population.

Applicant’s operational plan materials were complete and adequately summarized the governance, organizational structure, and service providers required to operate program. Applicant’s experience provided a strong case for being able to execute the proposed plan. Despite the fact that the operational plan met the criteria for approval, the TRP has one remaining concern about Applicant’s experience in Arizona. This concern is balanced by the Applicant’s knowledge and success operating in other communities across the US.

Although the Applicant’s business plan materials did not meet the criteria for approval based on the detail provided about budget assumptions, the discussion at the Capacity Interview of how these assumptions provided adequate bases for the numbers given, mitigated the TRP’s initial concerns and showed that the budgets are viable. This plan section further provided evidence of the Applicant’s experience and knowledge of school operation.

Educational Plan

	Preliminary TRP Scores				Revised TRP Scores			
Educational Plan Score ≥ 95%?	No	49	Of	55	Yes	54	of	55
Number of “Falls Below” ratings	0				0			
Number of “Approaches” ratings	6				1			

Plan Summary

The Applicant plans to serve students in the city of Goodyear, Arizona, a suburb of the Phoenix metropolitan area, where it states that 71% of the student population identifies as races other than White, 8% are considered English Language Learners, 11% are identified as Special Needs, and 50% qualify for the Free and Reduced Lunch Program. The Applicant plans to serve 2,000 students in grades K-8 when fully enrolled and will grow by one grade level each year, starting with grades K-3 in year 1 and growing to K-4 in year 2 and to K-5 in year 3.

The Applicant proposes a college preparatory school, seeking to replicate the highly successful Somerset Academy Inc.’s 55 charter schools in Florida. The Applicant will implement the “neighborhood school” philosophy to maintain the feeling of a small school environment, with student expectations, a unique code of excellence, an expectation of parental commitment, and a collaborative management infrastructure derived from the inception of its first school.

The Applicant will offer a standard school schedule with 180 days of instruction operating five days per week, with Wednesdays as early release days, as follows:

- Elementary: MTuThF 8:00 am-3:00 pm; W 8:00 am-12:20 pm

- Middle: MTuThF 7:50 am-3:10 pm; W 7:50 am-12:30 pm

The Applicant’s process for promotion includes the use of formative and comprehensive assessments as well as AzMERIT assessments. K-5 students must meet specific levels of performance in reading, writing, mathematics, science and social science for progression from one grade to another. Students in grades 6-8 must complete the following courses: ELA, Math, Science, Social Studies, PE, and 1.5 credits of electives. The Applicant will use baseline and Interim Assessments include a school-based assessment for Kindergarten upon registration and i-Ready Diagnostic screening to establish baseline at the beginning of the school year (K-8) in Reading and Mathematics and AIMS in Science (Grades 4 and 5).

While no course offerings were provided by the Applicant, content areas described include: reading, writing, math, science, social studies, PE and electives.

Analysis

The educational plan meets the criteria for approval as 98% of criteria was deemed “meets the criteria” by the TRP. While the Applicant’s materials were mostly complete and adequately summarized the target population, grades, philosophy, schedules, and assessment systems, they received a rating of “approaches” for the following:

- A.2.b: 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.
 - The Applicant addressed criteria, but lacked sufficient detail in: Providing details explaining how the school's proposed program of instruction will improve educational choice in the target population, particularly compared to the choices that already exist for that population.

Detail provided during the interview about the program of instruction, its flexibility and how it is used in similar communities addressed how it is adequate and viable to meet the needs of the target population.

Operational Plan

	<u>Preliminary TRP Scores</u>				<u>Revised TRP Scores</u>			
<u>Operational Plan Score ≥ 95%?</u>	No	23	of	29	Yes	29	of	29
<u>Number of “Falls Below” ratings</u>	1				0			
<u>Number of “Approaches” ratings</u>	5				0			

Plan Summary

The Board of Directors supervises the school Principal who then supervises the Teachers, Special Education teacher/specialist(s), Instructional Assistants, Receptionist, Registrar, and custodial.

Applicant plans to add an Assistant Principal in year 3.

The Applicant’s Governing Board is the ultimate policy-making body with the responsibility of operation and oversight of the school including, but not limited to, academic direction, curriculum, and budgetary functions. The Board of Directors is comprised of individuals with background in education, finance, real estate, charter operations, including Lourdes Isla Marrero, Todd German, Ana Diaz, Tony Morales, and Taylor Smith. Board members will:

- Oversee operational policies; Academic accountability, and financial accountability.

- Annually adopt and maintain an operating budget.
- Exercise continuing oversight over charter school operations.
- Report its progress annually to its sponsor, which shall forward the report to the Commissioner of Education at the same time as other annual school accountability reports.
- Ensure that the charter school has retained the services of a certified public accountant for the annual financial audit who shall submit the report to the governing body.
- Review and approve the audit report, including audit findings and recommendations
- Monitor a financial recovery plan in order to ensure compliance (if applicable).
- Report progress annually to its sponsor

The Applicant plans to contract with outside vendors to support the following:

- Educational Service Provider (ESP)
- Special Education Services
- Information Technology Services
- Legal Services
- Food Services
- Substitute Teacher Services
- Audit Services
- Facility Maintenance

Analysis

The operational plan meets the criteria for approval as 100% of criteria was deemed “meets the criteria” by the TRP. The Applicant’s materials were complete and adequately summarized the governance, organizational structure, and service providers required to operate program. The Applicant showed a strength in the number and caliber of local supporters backing their growth to this community.

While the applicant does not have experience in Arizona, it did demonstrate capacity to operate in states outside of its experience and is in the process of expanding to new locations outside of its home state. The Applicant and the EMO does not have experience in Arizona and the Governing Board does not currently have Arizona residents. Only a limited Board presence will be represented by local residents once added. However, the Applicant has success operating schools aligned with the proposed plan in other communities across the US, including places that mirror the proposed location of this school.

Business Plan

	<u>Preliminary TRP Scores</u>				<u>Revised TRP Scores</u>			
Business Plan Score ≥ 95%?	No	26	of	31	No	31	of	33
Number of “Falls Below” ratings	0				0			
Number of “Approaches” ratings	5				2			

Plan Summary

Proposed Location: The Applicant plans on entering into a long-term lease with Skyway Church of the West Valley located at 14900 West Van Buren Street located in the Avondale Elementary School District area.

Facilities

Requirements:

The educational building currently at Skyway Church consists of 37,570 Sq. Ft. with 23,800 Sq. Ft. of classroom space and approximately 5,500 Sq. Ft. for the gymnasium. Somerset Academy Arizona will have access to 22 classrooms, 5 office spaces, a cafetorium, along with outdoor recreational space. The Applicant plans to have 325 students in 13 classrooms in year 1, 425 students in 17 classrooms in year 2, and 525 students in 21 classrooms in year 3.

Budget Summary

	Startup Period	Year 1	Year 2	Year 3
Projected Enrollment:	n/a	310	405	500
Total Revenue:	\$200,000	\$1,875,674	\$2,480,809	\$3,066,965
Total Expenditures:	\$131,536	\$1,889,176	\$2,433,265	\$2,981,493
Ending Balance:	\$68,464	\$54,962	\$102,506	\$187,977

The Applicant plans on entering into a long-term lease with Skyway Church of the West Valley located at 14900 West Van Buren Street located in the Avondale Elementary School District area. Projected lease payments are as follows: \$6,000 in start-up year, \$281,351 in year one, \$323,554 in year two, and \$372,087 in year three. Lease budget for start-up year is for rental of several offices spaces in June & July to prepare for school opening.

The Applicant expects enrollment to grow from 310 in Year 1 (95% of 325 cap) to 405 in Year 2 (95% of 405 cap) and 500 in Year 3 (95% of 525 cap) with a full enrollment goal of 2,000 students once all grades are fully enrolled.

Marketing expenses are projected to total \$10,000 with 100% of funds expended in the start-up year. The Applicant plans to leverage the following tools to attract students: school website, social media such as Facebook, flyers, direct mailers, advertisements in varying English and Spanish media, building relationships with community groups, and a door-to-door approach.

The Applicant will begin in Year One with a total staff of 22 - 18 teachers and four admin and support staff. By Year Three, Applicant will expand to a total staff of 36 - 27 teachers and nine admin and support staff. The Applicant's board will lead the search for the founding principal and the hiring process will include a background check, fingerprinting, letters of recommendation, and interviews. Once hired, the principal will lead the search for all remaining staff. The Applicant plans to leverage job placement ads in national industry publications and local advertising/marketing to attract talent.

The professional development offered to teachers will align with student achievement data, curriculum, instructional personnel needs, goals from School Improvement Plans, blended learning programs, and annual school reports. Teachers will be evaluated via direct observation, data/outcomes, and the examination of artifacts, and informal and formal classroom observations.

The total budget as listed above assumes 95% enrollment.

Analysis

The business plan fell below the criteria for approval in the revised application, but the Applicant did adequately support their case in the interview on two categories as summarized below:

- C.4.c: Demonstrate through the assumptions that the amounts listed are viable and adequate. (start-up budget)
 - Addresses criteria, but lacks sufficient detail in: Demonstrating through the assumptions that the amounts listed for insurance, connectivity, office furniture, and copier are viable and adequate.
- C.5.c: Demonstrate through the assumptions that the amounts listed are viable and adequate. (three-year budget)
 - Addresses criteria, but lacks sufficient detail in: Demonstrating through the assumptions that the amounts listed for registration, travel, marketing, fees and permits, and furniture are viable and adequate.

Detail provided during the interview addressed assumptions for both budgets in a way that shows they are adequate and viable amounts and align to the operational plan, especially with respect to student recruitment. Additionally, the applicant showed strength in experience having the flexibility in their EMO costs to adjust in startup years if needed.

Evidence of Capacity

Applicant Summary

Name	Role	Attended Interview?
Lourdes Isla Marrero	Board member; Chair	Yes
Todd German	Board member; Vice Chair & Treasurer	Yes
Ana Diaz	Board member; Secretary	Yes
Tony Morales	Board member; Alumnus	Yes
Taylor Smith	Board member	Yes

Analysis

Lourdes Isla Marrero has 15 years of education experience and serves as the principal of a K-8 charter school in Florida. She brings school administration, charter operations, budgeting, and education expertise.

Todd German is an advisor and partner at a private investment management firm. He has served on a number of education organization boards. He brings financial, real estate, and charter school governance experience.

Ana Diaz has 15 years of education experience including teaching and charter school leadership. She brings school operations, curriculum planning, program evaluation, data analysis, assessment design and professional development to the board.

Tony Morales is an alumnus of Somerset who has education consulting experience which enables him to advise on an exceptional educational plan for the school.

Taylor Smith is the President and founder of Project Finance & Development Inc. (PFDI) which specializes in charter school site location and development. He brings knowledge of charter schools and the importance of charter schools and their service to the community.

An additional person, Francisco Mestre, attended the interview as well, to represent the EMO.

The Applicant's team has considerable experience operating schools across the US, including communities that

mirror the proposed location, along with the extensive work to build community ties, suggests they have the capacity required to execute the plan.

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

Applicant Group	Somerset Academy Arizona, Inc.
Proposed School Name	Somerset Academy of Arizona

REVISED APPLICATION RATINGS						
Part A	Educational Plan	F	A	M	Technical Assistance / Comments	
A.1	Educational Philosophy					
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 will improve educational choice in the target population, particularly compared to the choices that already exist for that 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	Revised Submission 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	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	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	Meets the Criteria	
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	0	5		
A.3.1	Mastery and Promotion	F	A	M	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	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	Revised Submission Meets the Criteria
A.3.1e	Ensure consistency with Area II of the Academic Systems Plan.			1	Meets the Criteria
A.3.1 Total		0	0	5	
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.				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
A.3.2 Total		0	0	0	
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	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	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	<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"> • adopting new and supplemental curriculum, • gathering curriculum options, • evaluating proposed curriculum programs and materials, and • verifying the curriculum is aligned to Arizona State Standards. <p>ii. Implementation of curriculum to include;</p> <ul style="list-style-type: none"> • integrating curriculum into instruction consistently, and • implementing the curriculum with fidelity to the design of the curriculum and program of instruction. <p>iii. Evaluation of curriculum to include;</p> <ul style="list-style-type: none"> • 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. <p>iv. Revision of curriculum to include;</p> <ul style="list-style-type: none"> • making revisions to existing curriculum, and • replacing/supplementing existing curriculum through adoption of new curriculum. <p>v. Adaptation to address the curriculum needs of subgroup populations by;</p> <ul style="list-style-type: none"> • ensuring that implemented curriculum and supplemental curriculum meet the identified needs of students in subgroups. 		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"> • 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. <p>ii. Analyzing assessment data;</p> <ul style="list-style-type: none"> • 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. <p>iii. Adapted to meet the needs of subgroups;</p> <ul style="list-style-type: none"> • evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group. <p>iv. Year to Year comparison;</p> <ul style="list-style-type: none"> • 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	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"> 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. <p>ii. Evaluating instructional practices;</p> <ul style="list-style-type: none"> integrating curriculum into instruction consistently, and implementing the curriculum with fidelity to the design of the curriculum and program of instruction. <p>iii. Evaluation of curriculum to include;</p> <ul style="list-style-type: none"> 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. <p>iv. Adapted to meet the needs of subgroups.</p> <ul style="list-style-type: none"> evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group. <p>v. Providing feedback that develops the quality of teaching and standards integration;</p> <ul style="list-style-type: none"> 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 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"> determining what PD topics will be covered throughout the year and deciding what data and analysis will be used to make those decisions. <p>ii. Supporting high quality implementation;</p> <ul style="list-style-type: none"> 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. <p>iii. Monitoring implementation and follow-up;</p> <ul style="list-style-type: none"> monitoring that the strategies learned in professional development are implemented, and following up with instructional staff regarding levels of implementation. <p>iv. Adapted to meet the needs of subgroups;</p> <ul style="list-style-type: none"> 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	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	Revised Submission Meets the Criteria
A.5j	Be consistent with all sections of the application package.			1	Meets the Criteria
A.5 Total		0	0	10	
A.6.K-2	K-2 Grade Span Instructional Analysis	F	A	M	Technical Assistance/Comments
A.6.K-2a	<p>Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics.</p> <p>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.</p>			1	Meets the Criteria

A.6.K-2b	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. 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 targets.			1	Meets the Criteria
A.6.K-2c	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. 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
A.6.K-2d	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. 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
A.6.K-2e	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. 5. Formative Assessment: List criteria for determining whether students have met each of the learning targets.			1	Meets the Criteria
A.6.K-2f	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. 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	Meets the Criteria
A.6.K-2g	Provide a complete response based on the Required Standard for Reading, Writing, and Mathematics. 7. Remediation : Describe the processes available to provide support to students that do not meet the learning targets.			1	Meets the Criteria
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. 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
A.6.3-5b	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 targets.			1	Meets the Criteria
A.6.3-5c	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
A.6.3-5d	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
A.6.3-5e	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

A.6.3-5f	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	Meets the Criteria
A.6.3-5g	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	Meets the Criteria
A.6.3-5 Total		0	0	7	
A.6.6-8	6-8 Grade Span Instructional Analysis				Technical Assistance/ Comments
A.6.6-8a	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
A.6.6-8b	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
A.6.6-8c	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
A.6.6-8d	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
A.6.6-8e	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
A.6.6-8f	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	Meets the Criteria
A.6.6-8g	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	Meets the Criteria
A.6.6-8 Total		0	0	7	
	Part A Sub Total	0	1	54	
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	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	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.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	Meets the Criteria
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.2 Total		0	0	5	
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	Meets the Criteria
B.3d	Be consistent with all sections of the application package.			1	Meets the Criteria
B.3 Total		0	0	4	
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.			1	Meets the Criteria

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.			1	Revised Submission Meets the Criteria
B.3.1c	Provide a clear description of the services to be provided by the ESP consistent with the service agreement.			1	Meets the Criteria
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.			1	Meets the Criteria
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.			1	Meets the Criteria
B.3.1g	(EMOs only) Describe the ESP's roles and responsibilities in relation to the Applicant consistent with the service agreement.			1	Meets the Criteria
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.			1	Meets the Criteria
B.3.1 Total		0	0	7	
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	Meets the Criteria
B.3.2 Total		0	0	5	
	Part B Sub Total	0	0	29	
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	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
C.1 Total		0	0	6	
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	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	Revised Submission 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 • the number of each type of instructional and non-instructional personnel each year.			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
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	Revised Submission Meets the Criteria
C.4c	Demonstrate through the assumptions that the amounts listed are viable and adequate.		1		Addresses criteria, but lacks sufficient detail in: Demonstrating through the assumptions that the amounts listed for start-up expenses prior to June are viable and adequate to achieve target enrollment.
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	Revised Submission Meets the Criteria

C.4 Total		0	1	5	
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	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	Meets the Criteria
C.5e	Demonstrate through the assumptions that the amounts listed are viable and adequate.		1		Addresses criteria, but lacks sufficient detail in: Demonstrating through the assumptions that the amounts listed for marketing are viable and adequate.
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.				NOT APPLICABLE
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
C.5 Total		0	1	5	
	Part C Sub Total	0	2	29	
Grand Total	Parts A, B, and C	0	3	112	
SUMMARY	No scoring area in Part A, B, or C received a score of Falls Below				
	No more than one scoring area in each section scored Approaches				
	Educational Plan Meets 95% Test				
	Operational Plan Meets 95% Test				
Business Plan Fails 95% Test					
CONCLUSION	Fails to Meet the Criteria, Therefore Substantively Incomplete				