AGENDA ITEM: NEW CHARTER APPLICATION – CASA ACADEMY

CASA Academy submitted a complete new charter application package to serve grades K-3 for the Board's consideration. The revised application package meets the minimum scoring requirements set by the Board for the 2014-2015 application cycle.

REPORT SUMMARY

Applicant Name: CASA Academy

Authorized Representative Name: Jenna Leahy

Proposed School Name: CASA Academy

Proposed School Location: Central Phoenix

Mission Statement

CASA Academy exists to create empowered citizens of integrity ready for success in college, life, and society by providing a transformative education using authentic approaches that prepare students to overcome challenges, think critically, excel in academics, and become role models for their community.

Target Population

CASA Academy will serve students in kindergarten through third grade in the Central Phoenix community, between Interstate 17 and the Piestewa Freeway, north of Thomas Road and south of Bethany Home Road. The targeted population is 90% minority, with 81% qualifying for free or reduced-price lunch.

Student Count

Year	Grades Served	# of Students
1	K-1	125
2	K-2	225
3	K-3	325

School Calendar
Extended School Year, 200 days

Target Start Date
August 4, 2014

Application Package Scoring

	Preliminary TRP Scores		Revised TRP Scores	
Any **Falls Below the Expectations** ratings?	No		No	
Any section in which more than one evaluation area scored **Approaches**?	Yes		No	
		Percent Meets		Percent Meets
Educational Plan Score ≥ 95% Meet standard?	Yes	100%	Yes	100%
Operational Plan Score ≥ 95% Meet standard?	Yes	100%	Yes	100%
Business Plan Score ≥ 95% Meet standard?	No	90%	Yes	97%

The TRP provided the Applicant with written technical assistance based on its review of the preliminary written application package and the revised written application package prior to the in-person interview.

In-Person Interview Summary

During the in-person interview the Applicant responded to the questions regarding the submitted (Educational, Operational, Business) Plan.

The Applicant was represented at the interview by all five corporate principals. Collectively, they addressed the TRP's questions across all areas of the application package. The interview also addressed the TRP's questions regarding the skill set of the proposed school leadership. The Applicant demonstrated commitment to the target population and explained that the majority of the staff would be engaged in a family and parent relations program and teachers would have weekly contact with parents to provide support.

When questioned regarding the narrative statement "if, by July 1st the student is not performing at mastery in reading and math, the student will be retained" and how this relates to students with special needs, the Applicant acknowledged the need for special education students to be given due consideration and, "the conversation would be based on the amount of growth during the school year."

The Applicant demonstrated a thorough understanding of the proposed Program of Instruction and alignment with the Performance Management Plan including a detailed process in which pacing documents would be designed, unit plans will be created from the pacing documents, and grade level planning will continuously review alignment.

The Applicant acknowledged that the current base teacher salary of $35,000 for a 200-day school year was low; but stated that it is "where we are right now" and they "believe it's a salary we can use to recruit talent." They also shared their intention of fundraising for various staff bonuses.

Qualitative Analysis Summary

The TRP recommends that the application package for CASA Academy be approved as it meets the necessary criteria and the Applicant has demonstrated the capacity to open and operate the school as presented.

Within the Educational Plan the target population was defined utilizing general demographics of the target region including current K-3 schools in the target area. The Applicant indicates the low levels of educational attainment and draws a "correlation between low levels of education in this region and the effects on health, income, and crime." The Program of Instruction supported the educational philosophy with multiple researched instructional strategies ensuring authentic and varied teaching approaches will be utilized. A comprehensive program of formative and summative assessments demonstrated how the key components of the instructional program would be utilized for analysis and to inform instruction at all levels.

In the Operational Plan, the governing board roles and responsibilities are detailed including mission alignment, academic oversight, succession planning, and financial oversight. School leadership roles and responsibilities are divided between an academic director and director of students and operations. Additional management personnel are denoted. Year one staffing includes contracted services for special education; these services will be handled by a full time staff member beginning in year two.

The application package presented a plan to secure space within an existing school facility and the interview provided assurance that proper steps had been taken toward establishing a lease and ensuring knowledge of the facility location and target population.

The Applicant satisfactorily prepared the proposed Start Up Budget utilizing the secured Arizona Charter Schools Program Grant of $230,000 as well as the proposed conservative Three Year Operating Budget. The TRP analyzed the Three Year Operating Budget and determined it to be realistic and viable.

The Applicant addressed and sufficiently answered questions presented during the in-person interview. Clarification and additional detail regarding the Target Population, Program of Instruction, promotion and retention, administrative skills and capacity, and business operations were well addressed. The TRP came to

consensus following the in-person interview that all answers demonstrated evident preparation, the necessary due diligence, and competence to open and operate CASA Academy.

A. EDUCATIONAL PLAN

The following summary was created from excerpts and summaries of the documents submitted for the Applicant's Educational Plan.

Plan Summary

The Applicant proposes to open CASA Academy, a K-3 elementary school, built on an educational philosophy stemming from the belief all students deserve the opportunity to receive an excellent education. The Educational Philosophy states that primary grades set the foundation for student success, an excellent education includes both academics and character development, and providing students with an excellent education, in turn, strengthens society as a whole.

The proposed CASA Academy curriculum provides a foundation of learning in literacy and core content areas and emphasizes character development. The curriculum is aligned to the Common Core Standards and the Arizona State Standards for science and social studies.

Authentic approaches and direct instruction to teach students the curriculum are employed including The Daily 5 CAFÉ, an acronym that stands for Comprehension, Accuracy, Fluency, and Expanding Vocabulary. Additional instructional approaches include Reading Mini-Lessons, Guided Reading, content incorporation, and Writing Workshop. CASA Academy also will utilize reading and math acceleration activities, content lessons, morning meetings, and circle time instructional opportunities.

CASA Academy's data driven instruction utilizes multiple forms of data analyses. Methods of assessment include end of lesson, minute-by-minute, and daily checks for understanding. In addition teachers will create and administer unit level common formative assessments as well as subject driven pre-tests and summative, benchmark, and standardized assessments required by the State of Arizona.

PMP

The Performance Management Plan (PMP) for new applicants is a continuous school improvement plan that demonstrates the Applicant is ready to implement systems for meeting the Board's academic performance expectations. The Applicant submitted a PMP that met the criteria in all areas for both Reading and Math. Details can be found in the attached Scoring Rubric (presented in the application portfolio: B. Scoring Results).

Curriculum Samples

Curriculum samples were provided for grades K-3. The table below indicates which curriculum samples in the revised application package met all Board requirements (+), and which had deficiencies (-). Details can be found in the attached Scoring Rubric (presented in the application portfolio: B. Scoring Results).

Grade	Math	Reading	Writing	Science
K	+	+	+	
1	+	+	+	
2	+	+	+	
3	+	+	+	

Educational Plan Findings

	Preliminary TRP Scores		Revised TRP Scores	
Educational Plan Score ≥ 95% Meet standard?	Yes	56 of 56	Yes	56 of 56
Number of "Falls Below" ratings	0		0	
Number of "Approaches" ratings	0		0	

Analysis of Educational Plan

The Educational Plan meets the standard for approval as expectations were met in all areas. CASA Academy's detailed Educational Philosophy focuses on the development and implementation of an educational program preparing primary school students for educational advancement. The Applicant demonstrated a clear and unwavering commitment to the educational philosophy.

The Applicant's target population had clearly been researched utilizing information from the U.S. Census and neighboring school districts. A large Latino population is identified as the target population and evidence was presented to support the Applicant's understanding of students most likely to be served. In addition to demonstrating an understanding of the target population, the Applicant provided thorough rationale as to the relevance of the proposed Program of Instruction for the Target Population. Additional confirmation of the Applicant's understanding of the target population was noted during the interview (outlined in the Evidence of Capacity analysis below).

The Program of Instruction is designed to support the philosophical belief that all students "deserve opportunities to think critically, solve real-world problems, and apply their learning to a variety of authentic situations." Within the Program of Instruction multiple instructional strategies had been researched and were included to ensure delivery of instruction through authentic and varied approaches. A comprehensive program of assessment from daily assessments through formative, summative, benchmark, and standardized assessments has been designed. The curriculum samples clearly demonstrated how the key components of the instructional program work together to provide a solid educational program.

The Performance Management Plan supports the CASA Academy Program of Instruction. The Applicant appropriately values regularly updating the PMP and ongoing review and evaluation by the school's governing board to ensure the plan maintains relevance.

B. OPERATIONAL PLAN

The following summary was created from excerpts and summaries of the documents submitted for the Applicant's Operational Plan.

Plan Summary

CASA Academy is a non-profit corporation, located in Phoenix, which was created in September 2012 for the purpose of operating a charter school with five Directors: Jenna Leahy, Tacey Clayton, Julie Rhein (took office 05/15/2013), Nathan Arrowsmith (took office 05/03/2013), and Olu Omodara (took office 05/03/2013). The entity incorporated with the Arizona Corporation Commission as Clayton and Leahy Educators Incorporated, and changed its name to CASA Academy in April 2013.

The proposed school governing body and corporate board are the same and consist of three members and two ex-officio members, all of whom are corporate principals. The school governing body of CASA Academy will delegate all administrative responsibilities to the director of students and operations, Jenna Leahy, and the academic director, Tacey Clayton. The academic director will oversee instruction, curriculum, and assessment, including mandated state testing, special education services, and staff development. The director of students and operations will oversee the financial management of the school, contracted services personnel, grants

management, and the office manager. A staff of highly qualified individuals will be hired and contracts established with external service providers to help execute the day-to-day operations of the school.

The table below delineates the composition of the school governing body as described in the narrative:

School Governing Body Member Type	Name
Charter Organization	Nathan Arrowsmith
Charter Organization	Olu Omodara
Charter Organization	Julie Rhein
Ex-Officio Member	Tacey Clayton
Ex-Officio Member	Jenna Leahy

Principal Background Information

Authorized Representative and Principal: *Tacey Clayton*
Confirmed Education History: Masters of Education in Administration and Supervision, University of Phoenix, 2012
Confirmed Employment History: Teacher, Glendale Elementary School District, July 2012-present; Literacy Specialist, Teach for America, March 2011-July 2012; Teacher, Creighton School District, July 2010-May 2012; Teacher, Roosevelt School District, July 2008-May 2010
Arizona FCC Expires: 05/22/2014
Current or Past Charter Affiliations[1]: None

Authorized Representative and Principal: *Jenna Leahy*
Confirmed Education History: Bachelor of Arts in International Relations, Scripps College, 2010
Confirmed Employment History: Director of School Operations, CASA Academy, July 2013-present. Teacher, Imagine Camelback, June 2010-July 2013
Arizona FCC Expires: 05/18/2016
Current or Past Charter Affiliations[1]: None

Principal: *Nathan Arrowsmith*
Confirmed Education History: Juris Doctor, Arizona State University, 2013
Confirmed Employment History: Summer Associate, May, Potenza, Baran and Gillespie, P.C., May 2012-August 2012; 2nd Grade Teacher, Roosevelt School District, July 2007-May 2010
Arizona FCC Expires: 04/29/2019
Current or Past Charter Affiliations[1]: None

Principal: *Olu Omodara*
Confirmed Education History: Bachelor of Science in Management Information Systems, Chicago State University, 1989
Confirmed Employment History: Business Manager, Prosperiti, LLC dba Favour Rexall Drugs, September 2005-present
Arizona FCC Expires: 04/18/2019
Current or Past Charter Affiliations[1]: None

[1] *In this section, "Current or Past Charter Affiliations" refers to a leadership or decision-making role in an existing charter school operation, such as charter representative, charter principal, or school site leader.*

Principal: *Julie Rhein*
Confirmed Education History: Masters of Education in Curriculum and Instruction, Arizona State University, May 2006
Confirmed Employment History: Early Childhood Mental Health Consultant, Southwest Human Development, July 2011-present; Assistant Director, Crisis Nursery, August 2007-July 2011
Arizona FCC Expires: 03/12/2016
Current or Past Charter Affiliations[1]: None

Operational Plan Findings

	Preliminary TRP Scores		Revised TRP Scores	
Operational Plan Score ≥ 95% Meet standard?	Yes	24 of 24	Yes	24 of 24
Number of "Falls Below" ratings	0		0	
Number of "Approaches" ratings	0		0	

Analysis of Operational Plan

The Operational Plan meets the standard for approval as expectations were met in all sections. Additionally, alignment with the application package as a whole is evident, for example, in the direct correlation between the cost of the contracted services from ASPIRE and the Budget Assumptions, and the qualifications of the proposed leadership as related to the educational program.

CASA Academy identifies a corporate board that also acts as the school governing body. The Applicant presented appropriate school governing body responsibilities and structure, specifically, it has responsibility for mission alignment, academic oversight, board effectiveness and succession planning, financial oversight, policy development, legal compliance, oversight of the directors, and public promotion. The identification of a well-known web-based governing board resource system (Board on Track) provided by The High Bar, a national provider, as well as a board committee structure are additional strengths.

The Applicant presented the management roles and responsibilities with comprehensive detail, identifying the critical skills and experience for the two key administrative roles, and clear explanation of how the proposed academic director, Tacey Clayton, and director of students and operations, Jenna Leahy, meet these qualifications. The application package also details their oversight responsibilities for key areas including instruction, curriculum and assessment, staff development, financial management, contracted services, personnel, grants management, and the student accountability system. In the interview, both school leaders provided compelling overviews of their skills and experience, demonstrating capacity, with supported from the three board members in attendance.

C. BUSINESS PLAN

The following summary was created from excerpts and summaries of the documents submitted for the Applicant's Business Plan.

Plan Summary

Documentation is provided detailing the available square footage necessary for the number of identified classrooms and support spaces required. When the application package was completed three spaces had been determined as potential options. Subsequently, a new facility (Shepherd of the Valley Lutheran Church) has been identified and lease negotiations are in process.

The Applicant presents the advertising and recruitment campaign including a timeline for the implementation of marketing and recruitment strategies. The enrollment process and policies are presented.

Facility Information

Proposed School Name:	CASA Academy
Proposed Location:	Unconfirmed location: Shepherd of the Valley Lutheran Church – 15th Ave. and Maryland Ave., Phoenix
Facilities Requirements:	The total number of classrooms will grow from five classrooms in year one to thirteen classrooms in year three. The total number of square feet needed in year one is 6,875, growing to 17,875 in year three.

Budget Summary

The Applicant has secured an AZ CSP grant from the Arizona Department of Education for start-up purposes. The secured funds, in the amount of $230,000 per year for three years, as stated by the Applicant, are available as confirmed by Arizona Department of Education Grants Management. The three-year budget projections provide for a minimum three percent contingency/surplus.

The table below presents a summary of the budgets by year:

	Startup Period	Year 1	Year 2	Year 3
Projected Full Enrollment:	N/A	125	225	325
# Students Budget Based On:	N/A	112.5 (90%)	202.5 (90%)	292.5 (90%)
Total Revenue:	$230,000.00	$819,182.42	$1,303,011.92	$1,901,933.45
Total Expenditures:	$184,705.59	$592,807.50	$1,067,569.00	$1,720,066.81
Ending Balance:	$45,294.42	$226,574.92	$235,442.45	$181,866.64

Business Plan Findings

	Preliminary TRP Scores		Revised TRP Scores	
Operational Plan Score ≥ 95% Meet standard?	No	26 of 29	Yes	28 of 29
Number of "Falls Below" ratings	0		0	
Number of "Approaches" ratings	3		1	

Analysis of Business Plan

The Business Plan meets the standard for approval because it presents a viable facility and a sound budget aligned with the proposed school's educational and operational needs. Also, the Applicant's advancement on securing a lease with the Shepherd of the Valley Church at 15th Avenue and Maryland Avenue, as described during the interview, will likely result in a reduction in facility improvement costs, positively impacting the budget.

The Applicant's presentation of marketing and recruitment strategies was deemed appropriate, as were the enrollment procedures, which were fair and equitable. The TRP noted strengths including the level of detail in the recruitment calendar and the detailed open enrollment procedure demonstrating intentionality toward ensuring all students have equal opportunity to enroll.

The staffing plan is viable and adequate for the program of instruction and operation of the school. The Applicant presented a clear path toward scaling the number of personnel from year one through three and

ensured staffing was included to meet special education needs. Salaries are realistic yet competitive and a detailed interview/hiring process demonstrates an intentional approach to hiring.

The proposed Start Up Budget well utilizes the Applicant's secured Arizona Charter Schools Program Grant of $230,000 with realistic projections for administrative and support personnel as well as marketing, advertising, facility lease, and equipment needs.

The proposed Three Year Operating Budget was based on 90 percent of the projected full enrollment in each year. The Applicant notes an intention of reaching full enrollment yet conservatively budgets a 90 percent attendance figure for the first 100 days of school to ensure conservative spending. The Three Year Operating Budget is designed to ensure a minimum three percent contingency/surplus each year. The Three Year Operating Budget is realistic and viable. The TRP found the budget to address the criteria, and clarifying detail in regards to highly qualified personnel and the base teaching salary was provided in the interview.

EVIDENCE OF CAPACITY

Applicant Summary

The table below lists the participants in the In-Person Interview:

Name	Role	Attended Interview?
Tacey Clayton	Corporate Principal/ Proposed Academic Director	Yes
Jenna Leahy	Corporate Principal/ Proposed Director of Students and Operations	Yes
Nathan Arrowsmith	Corporate Principal/ Corporate Board Chair	Yes
Julie Rhein	Corporate Principal/ Corporate Board Member	Yes
Olu Omnadara	Corporate Principal/ Corporate Board Member	Yes

Analysis of Applicant Capacity

The TRP finds that the Applicant has the range of knowledge, skills and experience needed to open and operate a high quality school, specifically as demonstrated by responses to comprehensive questioning over the three primary areas of the application package at the interview.

The Applicant demonstrated a clear and unwavering commitment to the educational philosophy. The TRP was positively influenced by the Applicant's overview of the work of the founding board and ongoing training for the board. The board members in attendance supported the selection of the two individuals, specifically noting their ability to build relationships and passion for serving the target population.

The Applicant provided focused responses to questions related to the target population and specifically supporting the identified Latino students. The due diligence conducted to understand the target population, developing a marketing campaign geared toward these students, and ensuring key stakeholder group involvement was solid, as was the intentional approach to expand the governing board to reflect the target population.

Although within the application package the Applicant described efforts toward two potential facilities, during the interview they shared their intent to sign a lease with a different facility, describing the location as "ideal" and within one block of 2,000 low-income families. The positive impact of this decision on the budget indicates both commitment to the students and an eye towards fiscal responsibility.

The TRP asked the Applicant to provide detail regarding the alignment of the Program of Instruction with the Performance Management Plan. The academic director described the design of pacing documents, unit plans,

daily lesson plans and strategies to ensure ongoing alignment including additional professional development days and administrative work with teachers through grade level planning. This convincing level of detail was also provided in regards to the promotion or retention of students.

The Applicant answered questions related to marketing, student recruitment, personnel, and the Three Year Operating Budget with clarity and both the proposed leaders and board members present demonstrated a keen understanding of the necessary operational and financial components of school operation.

BOARD OPTIONS

Option 1: The Board may approve the application package. Staff recommends the following language for consideration: Based upon review of the contents of the portfolio provided for this Applicant and the information provided by the representatives of the Applicant during consideration, and given it is within the sole discretion of the Board to approve or deny a charter, I move to approve the application package and grant a charter to CASA Academy to establish CASA Academy charter school to serve grades K-3.

Option 2: The Board may deny the application package. The following language is provided for consideration: Based upon a review of the contents of the portfolio provided for this Applicant and the information provided by the representatives of the Applicant during consideration, and given it is within the sole discretion of the Board to approve or deny a charter, I move to reject the application package and deny the request for a charter of CASA Academy to establish a charter school for the reason(s) that its application failed to meet the requirements of Title 15, Chapter 1, Article 8 due to: (specific statement made by the Applicant during Board consideration).