AGENDA ITEM: NEW CHARTER APPLICATION – CREATE ACADEMY

Create Academy submitted a complete new charter application package to serve grades K through 12 for the Board's consideration. The application package meets the scoring requirements set by the Board for the 2015-2016 application cycle.

REPORT SUMMARY

Applicant Name: Create Academy.

Authorized Representative Names: Rebecca Halonen and Angela Pinholster

Proposed School Name: Create Academy

Proposed School Location: Central Phoenix

Mission Statement

Through an arts integrated curriculum anchored in project-based learning, Create Academy will prepare all students for success in college, career, and society by teaching students to collaboratively invent, design, and implement creative solutions that address societal problems and injustices.

Target Population

The community Create Academy will serve is primarily Hispanic and low-income. The School Directors plan to open Create Academy in Central Phoenix, north of the Light Rail Line, between Central and 44th Street, in one of the following zip codes: 85034, 85004, or 85006. The school districts that serve these zip codes have a high student population living at or below the poverty line.

Student Count

Year	Grades Served	# of Students
1	K-2, 5-6	200
2	K-2, 5-7	290
3	K-8	360

School Calendar
Standard, 180 days

Target Start Date
August 3, 2015

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	98%	Yes	99%
Operational Plan Score ≥ 95% Meet standard?	No	84%	Yes	100%
Business Plan Score ≥ 95% Meet standard?	No	86%	Yes	100%

The Technical Review Panel (TRP) provided the Applicant with written technical assistance based on its reviews of the preliminary and revised written application packages 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 provided articulate, consistent, and thorough responses during the interview, and sufficiently addressed the TRP's questions. Co-founders and proposed school leaders Rebecca Halonen and Angela Pinholster responded to the TRP's questions about the Educational Plan. It was evident throughout the interview that the co-founders have worked collaboratively on all aspects of school development. The leaders were clear and consistent about how leadership responsibilities are and will be divided between them (interview, 58.33 and B.3, p. 3). Their performance during the interview persuaded the TRP that the proposed dual-leader model will be successful. The TRP found the Applicant's responses particularly thoughtful in that, for the few elements still under development, the Applicant acknowledged as much and described their analysis, decision-making process, and progress toward reaching a decision. The TRP left the interview confident that the Applicant is aware of the challenges of launching their proposed school model, and is prepared to tackle these challenges through their thoughtfulness and a commitment to ongoing training and development in all aspects of their school model (interview, 48:00).

Two of three board members attended the interview, one in person, and one by conference call. Edgar Olivo, who attended in person, responded to questions related to operations, board governance, and the business plan. The TRP sought more information about the board's plan to grow and develop through the addition of new members; Mr. Olivo was reflective in describing the board's current strengths and weaknesses and presented a clear plan and timeframe for addressing the gaps. It was clear to the TRP that the board is meaningfully engaged in the school's start-up and committed to its ongoing success.

The responses to questions about the Educational, Operational, and Business Plans during the interview were consistent with the application package, and either reiterated information contained there or elaborated on elements in the application package with updates or additional details.

Qualitative Analysis Summary

The TRP recommends that the application for Create Academy be approved because it meets the criteria for the Educational Plan, Operational Plan, and Business Plan, and because the Applicant demonstrated the range of knowledge, skills, and experience needed to operate a high quality school.

The primary strengths of the plan are the instructional model, which meets the needs of the targeted student population, and a viable leadership team that features co-leaders who are accessing significant resources to launch the school. The Applicant proposes a bold mission that brings together significant foundational elements including arts integration, project-based learning, and a focus on social justice. The application package describes these three elements in detail, and explains how they will be woven together into an educational program that addresses students' needs. The instructional program involves co-teaching and project-based learning, both of which require extensive planning and training; the co-founders have attended trainings and visited schools around the country that utilize these methods successfully, and are building a resource library of sample lessons and units available to teachers. Create Academy's two founders have extensive and relevant teaching and leadership experience. They are both participating in the New Schools for Phoenix Fellowship and Charter Starter program, and have secured $400,000 in start-up funds, which provide substantial resources to launch the school. Notably, with these resources, both founders are receiving salaries, training, and internships for the entire year prior to school opening. Moreover, the board's collective credentials are particularly relevant for governing a high-quality arts integration charter school serving an underserved Hispanic population.

The application package includes start-up and three-year budgets that are viable for implementing the proposed program. The description of facilities requirements is comprehensive and aligned to the proposed instructional program; three potential spaces that meet these needs are identified. The Applicant is thoughtful about the staff required to implement the proposed model, and provides a detailed breakdown of instructional and non-instructional personnel, as well as their respective responsibilities, for each of the school's first three years of operation and at capacity. Additionally, the Applicant is clear about services for which it will contract, and has projected adequate funds to hire sufficient resources for a variety of services including special education, legal, payroll, accounting, food service, information technology, and building maintenance.

A. EDUCATIONAL PLAN

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

Plan Summary

Create Academy is an arts integration and social justice charter school that proposes to open in fall 2015. The school proposes to serve grades K, 1, 2, 5, 6 in year one, add two grades in years two and three, respectively (K-3, 5-7 in year two; K-8 in year three), and then add one grade each year until it reaches full K-12 enrollment in year seven.

The academic program has five principle components: arts integration and project-based learning; community and arts partnerships; data-driven instruction and college preparation; education with social purpose; and, collaboration and ongoing self-reflection. Two co-teachers will lead classes of 40 students in grades 1-6; kindergarten classes will have 20 students with one teacher and secondary classrooms (grades 7-12) will have 25 students with one teacher.

Create Academy's curriculum will be aligned with the Arizona College and Career Ready Standards, the National Next Generation Science Standards, and the National Core Arts Standards. Academic content will be presented through arts integration: in every lesson, core subjects are paired with creative writing, dance, design, film, music, theater, or visual art. Students will have studio art classes daily. Teachers will administer daily and weekly formative assessments and meet once a week to discuss student data. Students will take Galileo benchmark assessments three times per year; following each of these assessments, teachers will meet for a full data day to analyze the benchmark data and modify curriculum and instruction (Interview, 16:40, A.3, p. 6).

PMP

The Performance Management Plan (PMP) for new Applicants is a continuous school improvement plan that ensures 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.

Curriculum Samples

Curriculum samples were provided for grades K through 12. The table below indicates which curriculum samples in the revised application package met all Board requirements (+), and which had deficiencies (-). Details for areas that did not meet the standard can be found in the attached Scoring Rubric.

Grade	Math	Reading	Writing	Science
K	+	+	+	
1	+	+	+	
2	+	+	+	
3	+	+	+	
4	+	+	+	+
5	+	+	+	
6	+	+	+	
7	+	+	+	
8	+	+	+	+
9	+	+	+	+
10	+	+	+	
11	+	+	+	
12	+	+	+	

Educational Plan Findings

	Preliminary TRP Scores		Revised TRP Scores	
Educational Plan Score ≥ 95% Meet standard?	Yes	103 of 105	Yes	104 of 105
Number of "Falls Below" ratings	0		0	
Number of "Approaches" ratings	2		1	

Analysis of Educational Plan

The Educational Plan meets the standard for approval because it demonstrates a clear understanding of the students and community Create Academy will serve, provides a detailed description of the school's approach to improving pupil achievement in the target population, and describes methods of instruction that are aligned with the educational philosophy.

The Applicant proposes a bold mission that brings together significant foundational elements including arts integration, project-based learning, and a focus on social justice. The application package describes all three elements in detail, and explains how they will be woven together into a unique educational program that addresses students' needs. The school design requires that each daily lesson be delivered using one of the arts; hence, each curriculum will be developed from scratch (A.3, pp. 2 & 4). Further, during the interview the team described a viable plan and timeframe for developing the complete curriculum, which is already underway (interview, 27:57). By January 2015 the Applicant will have a complete set of scope and sequence plans along with a library of arts-integrated sample lessons.

The instructional program also involves co-teaching and project-based learning, both of which require extensive planning and training. The co-teaching plan is aligned with the Applicant's mission-critical focus on collaboration; embodied at the leadership level with dual academic leaders, modeled by teachers in the classroom, and required of students who will work in groups on project-based lessons (interview 31:25). The co-founders have attended trainings and visited schools around the country that utilize these methods successfully, including seminars on how to "teach the teacher." During the interview the Applicant explained that teachers will have access to sample project-based units. Additionally, the leaders demonstrated an awareness of the complexity of co-teaching and described plans to mitigate challenges by pairing new and veteran teachers, and instituting "co-teacher agreements" to empower productive working relationships.

Finally, the school anticipates serving a significant population of students with special needs (interview, 26:04, A.2, p. 8). The school will hire a special education director/teacher, beginning in its first year, to lead and oversee compliance, identification, and instruction for students with special needs, and has budgeted adequately for resources to contract out for specialized services.

B. OPERATIONAL PLAN

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

Plan Summary

Create Academy is a non-profit corporation, located in Tempe, AZ, that was created on September 30, 2013 for the purpose of establishing a charter school with five Directors: Rebecca Halonen (took office 4/7/2014), Angela Pinholster (founding member), Edgar Olivo (took office 4/7/2014), Carla Rivera-Cruz (took office 4/7/2014), Tania Katan (took office 4/7/2014).

The Create Academy charter will be held by the Create Academy board of directors, who will be the school governing body. The board will have a minimum of seven and a maximum of 13 voting members, and will have three committees: finance, academic, and governance. The founding board currently consists of three members and will transition to a governing board upon charter authorization.

The Create Academy organization was founded by the proposed co-directors Angela Pinholster (director of elementary education) and Rebecca Halonen (director of secondary education), both former teachers in Phoenix and participants in the New Schools for Phoenix Fellowship and the Charter Starter program. Both directors will report to the Create Academy board and hold non-voting seats on the board. In year two, the leadership team will also include a director of operations. The school will contract for special education, legal, payroll, accounting, food service, informational technology, and custodial services.

School Governing Body Member Type	Number	Name
Organization Principal(s)	3	Tania Katan Edgar Olivo, and Carla Rivera-Cruz
Organization Principal(s) Ex-Officio	2	Rebecca Halonen Angela Pinholster,

Principal Background Information

Authorized Representative and Principal: *Rebecca Halonen*
Confirmed Education History: Master of Fine Arts in Creative Writing, Eastern Washington University, 2012
Confirmed Employment History: Director, Create Academy, May 2014 – present; English Teacher, Maryvale High School, August 2012 – May 2014; Spanish Teacher, Girls Leadership Academy, August 2011 – May 2012; Spanish Teacher, Alhambra College Prep, August 2009 – May 2011
Arizona FCC Expires: August 11, 2015
Current or Past Charter Affiliations[1]: None

Authorized Representative and Principal: *Angela Pinholster*
Confirmed Education History: Master of Education in Curriculum and Instruction, Arizona State University, 2009
Confirmed Employment History: Director, Create Academy, May 2014 – present; Project Coordinator, Mesa Arts Center (employed by Allstaff Services), July 2013 – May 2014; Student Engagement Coordinator, ASU Herberger Institute for Design and Arts, November 2010 – May 2013; Teacher, Excelencia School, July 2009 – October 2010
Arizona FCC Expires: April 21, 2015
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 Name: *Tania Katan*
Confirmed Education History: Bachelor of Arts in Theatre, Arizona State University, 1997
Confirmed Employment History: Writer, Freelance Writer, October 2003 – present; Program Coordinator, Scottsdale Museum of Contemporary Art, February 2012 – present; Founder, Two Little Wishbones, 2008 – present
Arizona FCC Expires: March 27, 2020
Current or Past Charter Affiliations[1]: None

Principal Name: *Edgar Olivo*
Confirmed Education History: Currently attending Arizona State University, no post-secondary degree earned
Confirmed Employment History: Owner, Compass Career and Business Solutions, November 2011 – present; Assistant Slot Lead Supervisor, Casino Arizona, April 2003 – October 2011
Arizona FCC Expires: August 21, 2018
Current or Past Charter Affiliations[1]: None

Principal Name: *Carla Rivera-Cruz*
Confirmed Education History: Master of Science in Industrial Organizational Psychology, University of Central Florida, 2010
Confirmed Employment History: Teacher, Arizona Charter Schools Association, June 2013 – present; Teacher, DC Public Schools/Hart Middle School, August 2011 – June 2013; Family Case Manager, Devereux Foundation, July 2008 – July 2011
Arizona FCC Expires: April 2, 2020
Current or Past Charter Affiliations[1]: None

Operational Plan Findings

	Preliminary TRP Scores		Revised TRP Scores	
Operational Plan Score ≥ 95% Meet standard?	No	21 of 25	Yes	25 of 25
Number of "Falls Below" ratings	0		0	
Number of "Approaches" ratings	4		0	

Analysis of Operational Plan

The Create Academy Operational Plan meets the standard for approval because it includes a clear description of the responsibilities and composition of the governing board, and provides a clear delineation of roles and responsibilities for administering the day-to-day activities of the school.

The governance plan is clear, viable, and in compliance with statutory requirements. The governance narrative and bylaws set forth specific guidelines for membership, term limits, officers, and committees. Each of three current board members were carefully selected for their contributions to Create Academy's unique school model: one is a lifelong community member, Spanish speaker, and has and will continue to connect the school with existing community organizations that already serve its target population; another is an arts educator who will support arts integration; and the third is a staff member at the state charter association specializing in professional development who will support teacher and leader capacity building.

The management and operations plan is viable and adequate to implement the educational and operational programs. The application package identifies all members of the non-instructional staff and their responsibilities with respect to day-to-day management, including the directors of elementary and secondary education, office manager, special education director/teacher, and director of operations (added in year two). The application package further identifies managerial duties by category (instruction, curriculum and assessment, professional development, financial management, contracted services, personnel, grants management, student information

system, marketing and enrollment, crisis management, parent and student communication, discipline and culture, legal services) and identifies which specific staff member is responsible in each of the first three years of operation (B.3, p. 4). The Applicant is especially clear about the breakdown of responsibilities between the two co-directors (interview, 58:33, B.3, p. 3).

With respect to contracted services, the application package delineates all areas for which the school will engage external contractors: special education, legal, payroll, accounting, food service, information technology, and building maintenance. The professional qualifications of each provider are included, and cost projections for each service are based on quotes the applicant secured from vetted providers as well as from charter schools in the Phoenix area (B3.2, p. 1). The TRP found the Applicant resourceful in its search for cost-effective solutions, such as sharing bus transportation with a nearby charter school to avoid unnecessary costs (C.5, p. 11).

C. BUSINESS PLAN

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

Plan Summary

The school will employ 15.5 full-time staff (14.5 instructional and one non-instructional) in year one and 27.5 full-time staff (25.5 instructional and two non-instructional) in year three. All school staff will attend one month of professional development prior to the beginning of the school year.

Facility Information

Proposed School Name:	Create Academy
Proposed Location:	Create Academy will be located in Central Phoenix, north of the Light Rail Line, between Central and 44th Street, in one of the following zip codes: 85034, 85006, or 85004. The Applicant plans to lease an existing facility. A facility has not been secured; three available facilities within the target zip codes are identified in the application package.
Facilities Requirements:	Create Academy requires 12,000 square feet in year one, 17,400 square feet in year two, and 22,800 square feet in year three. Square footage is based on 60 square feet per student, which is adequate to accommodate a project-based learning curriculum. Create Academy requires six classrooms in year one, nine classrooms in year two, and 12 classrooms in year three. The school will make heavy use of studio spaces, requiring visual and performing arts studios in year one, a music studio in year two, and a computer graphics/design studio in year three.

Budget Summary

Create Academy's start-up budget is based on $400,000 of secured funds from the Arizona Charter Schools Incentive Program granted by the Arizona Department of Education. Start-up expenses include salaries for the two school directors in place since June 2014, salaries for teachers and clerical staff beginning in July 2015, and benefits for all staff beginning in July 2015. The Create Academy three-year operational budget is based on 90 percent of full enrollment. Estimated equalization assistance is calculated at $1,045,920, $1,546,486, and $2,022,143 in the first three years, respectively. Additional revenues include $200,000 in remaining grant funds from the AZ Charter Schools Incentive program during year one. Facilities costs are estimated at $12 per square foot for a total building rent/lease/loan cost of $144,000, $208,800, and $273,600 in each of the first three years, respectively.

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

	Startup Period	Year 1	Year 2	Year 3
Projected Full Enrollment:	N/A	200	290	380
# Students Budget Based On:	N/A	180 (90%)	261 (90%)	342 (90%)
Total Revenue:	$ 400,000	$ 1,280,527	$ 1,619,543	$ 2,030,404
Total Expenditures:	$ 365,393	$ 1,207,470	$ 1,611,282	$ 2,004,242
Ending Balance:	$ 34,607	$ 73,057	$ 8,261	$ 26,161

Business Plan Findings

	Preliminary TRP Scores		Revised TRP Scores	
Operational Plan Score ≥ 95% Meet standard?	No	25 of 29	Yes	29 of 29
Number of "Falls Below" ratings	0		0	
Number of "Approaches" ratings	4		0	

Analysis of Business Plan

The Create Academy Business Plan meets the standard for approval because the comprehensive description of facilities requirements will allow implementation of the program of instruction, the staffing plan is viable and adequate for operation of the school, and the start-up and three-year budgets are reasonable and consistent with the application package.

The description of facilities needs is comprehensive and aligned to the proposed instructional program. The Applicant seeks a space that can accommodate studio art space beginning in the first year of operation, as well as larger classrooms to accommodate classes of 40 in the primary grades (C.1, p. 1). Three potential spaces that meet these needs are available within the targeted geographical area, and a viable timeframe for acquiring and renovating facilities is included. The application package includes detailed information about the cost of renovating each facility and information about cost-effective lease terms to accommodate the school's phased enrollment plan. For example, one landlord is willing to divide the space and allow phased tenant improvements.

The staffing plan is viable and adequate for effective implementation of the instructional program. The application package includes a detailed breakdown of instructional and non-instructional personnel in each of the first three years and at capacity. The staffing plan reflects the instructional co-teaching model for elementary classrooms (grades 1-6) to have 40 students in one class with two teachers, and studio arts and foreign language teachers beginning in year one. A detailed hiring plan, tailored for various staff members, is included. For example, instructional staff will be required to conduct a demonstration lesson, and studio arts teachers will also be required to submit a portfolio.

The start-up and three-year budgets are comprehensive and aligned to all elements of the application package. The Applicant secured $400,000 in start-up funds that allows both founders to incubate the school full time for one year prior to opening. The Applicant has budgeted conservatively for expenses, including contracted services and facilities (B.3.2, p. 3 and C.5, p. 9). Additionally, the Applicant has created contingency budgets, including one at 50 percent of enrollment, to prepare for how it would maintain its mission-critical focus in the event of a significant revenue shortfall (interview, 1:03:35).

EVIDENCE OF CAPACITY

Applicant Summary

The table below describes the participation of the Applicant in the In-Person Interview:

Name	Role	Attended Interview?
Angela Pinholster	Authorized Representative/Corporate Principal Co-founder, proposed Director of Elementary Education	Yes
Rebecca Halonen	Authorized Representative/Corporate Principal Co-founder, proposed Director of Secondary Education	Yes
Tania Katan	Corporate Principal	No
Edgar Rafael Olivo	Corporate Principal	Yes
Carla Rivera-Cruz	Corporate Principal	Yes (by phone)

Analysis of Applicant Capacity

The TRP finds that the Applicant has the capacity to open and operate a high quality school because the proposed co-leaders possess a relevant range of knowledge, skills, and experience needed to incubate and lead a school, and both are receiving extensive training and internships specific to their school model through their participation in the New Schools for Phoenix Fellowship and Charter Starter program. The governing board is comprised of three members which possess skills directly aligned to supporting the school's model, and a plan for expanding the board upon finalized authorization.

Create Academy's two founders possess extensive, relevant teaching and leadership experience: Ms. Pinholster was an eighth grade teacher at Creighton Elementary in Phoenix, , interned under the leader of Vista College Prep charter school during its incubation, and has a Masters in Higher Education and in K-8 Curriculum and Instruction. Ms. Halonen has a Masters in Spanish Literature and Fine Arts, taught high school English to at-risk students in a credit-recovery program at Maryvale High School and Spanish at a Phoenix charter school during its first year of operation, and completed an internship under the principal at Arizona School for the Arts. The Applicant has $400,000 of start-up funding to allow the founders to draw full-time salaries, supporting the intensive work needed to incubate a successful charter school, and they have extensive plans for continuing internships and trainings locally and around the country to develop their capacity. The TRP found the co-founders particularly thoughtful and well-situated to start a new school given their access to ongoing training and development.

The TRP's evaluation of board members' capacity is primarily based on information in the application package, and reinforced through the interview. On paper, the group's collective credentials are relevant for governing a high-quality arts integration charter school targeting an underserved Hispanic population: one is a community leader, Spanish speaker, and will connect the school with community organizations that serve the its target population; another is an arts educator who will support arts integration; and the third is a staff member at the state charter association specializing in professional development who will support teacher and leader capacity building.

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 Create Academy to establish Create Academy charter school to serve grades K through 12.

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 Create 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).