

AGENDA ITEM EXECUTIVE SUMMARY: Enrollment Cap Amendment Request

Request

Morrison Education Group, Inc. (“Charter Holder”) submitted an expansion request to increase its enrollment cap from 275 to 850, beginning in FY 2019. This enrollment cap accounts for 3 years of projected student enrollment.

See Appendix A: Amendment Request and Support Materials.

The rationale for the Charter Holder’s increase in enrollment cap is due to the school being unable to meet the enrollment demands of the community as parent interest has exceeded the current enrollment capacity. The Charter Holder states they have “been over 100% of its allocated ADM for the last several years along with increased waiting lists”. The requested enrollment increase, per the submitted enrollment matrix chart, is detailed in the table below, “Three-Year Plan”. To meet the projected enrollment, the Charter Holder will use word of mouth and a strategic marketing plan that includes an Each One Reach One Initiative. The staffing plan was developed to consistently grow as the anticipated student enrollment increases. The Charter Holder plans to “use a variety of marketing outlets to attract high quality instructional staff including ADE, School Spring, social media outlets, a referral program, school website, and other job recruiting sources.” Teacher training and orientation activities are used so staff can better understand the student population being served while establishing a shared philosophy and support for the school’s mission.

Three Year Plan

	FY 2019	FY 2020	FY 2021
Grade Levels	K–8	K–8	K–8
Enrollment	585	700	850

Staff Recommendation

The Charter Holder has met the criteria to receive a staff recommendation for expansion.

Staff Recommendation Criteria	Analysis
In operation for three years	The Charter Holder has been in operation for 8 years.
“Meets Operational Standard” in the most recent Fiscal Year	The Charter Holder received an Overall Rating of “Meets” on the Operational Performance Dashboard in FY 2017.
“Meets Financial Performance Standard” in the most recent Fiscal Year	The Charter Holder received an Overall Rating of “Meets” on the FY 2015 and FY 2016 Financial Performance Dashboard.
Past enrollment trends indicate need for increase within three years	Enrollment in FY 2017 was 278.550, FY 2016 was 301.397 and FY 2015 was 284.154. The charter holder has exceeded its enrollment cap for the past three years. This demonstrates a need for an increase.
ADM is within 85% of current enrollment cap	According to ADE School Finance, the Charter Holder currently serves 275.998 students. The current enrollment cap is 275 and is within 100% of its current enrollment cap.
Each school operated by the Charter Holder performs at or above the average performance of a majority of schools within a five mile radius of the school’s location	Sun Valley Charter School performed at or above the average performance of a majority of schools within a five mile radius of the school’s location. Information regarding nearby schools is provided on page 2.

Profile

The Charter Holder was granted a new charter in 2009.

Governance

Corporate Board Members	School Governing Body Members	Type
April Beaty	April Beaty	Charter Organization
Juniper Chaffin	Juniper Chaffin	Unknown
Tanae Morrison	Leanette Heagan	Unknown
	Rachel Johnson	Unknown
	Tanae Morrison	Charter Organization
	Renaë Pena	Unknown

School Profile

School Name	Letter Grade FY 14	Month/ Year Open	Location	Grade Levels Served	Average AzMERIT Passing			
					ELA (FY 17 State Average 39%)		Math (FY 17 State Average 40%)	
					FY 16	FY 17	FY 16	FY 17
Sun Valley Charter School	C	August/2009	Phoenix	K-8	34%	36%	31%	27%

Additional School Choices Serving Grades K-8 within 5 Miles of School

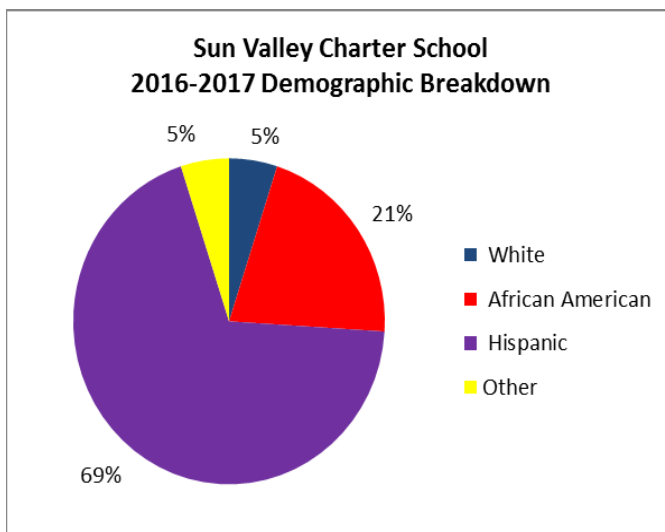
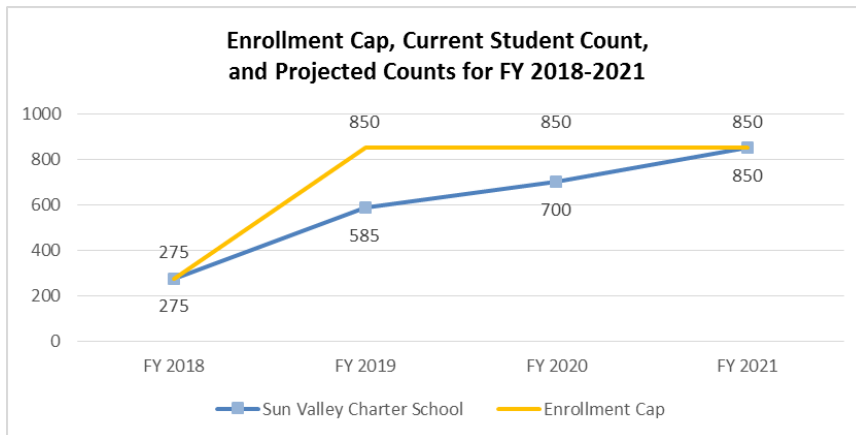
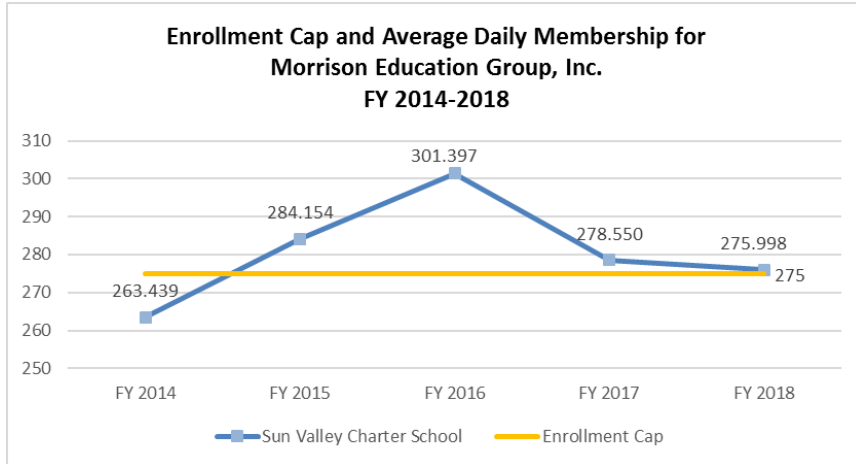
Total Schools	FY 2014 Letter Grade	Number of Charter Schools	FY 2017 AzMERIT Greater than State Average		Subgroups within (±5%) of Charter Holder's Subgroup Data		
			ELA (>39%)	Math (>40%)	FRL (±5%)	ELL (±5%)	SPED (±5%)
16	A	7	9	10	1	4	8
29	B	9	3	4	1	10	23
28	C	4	1	1	0	7	24
12	D	1	0	0	0	1	10
3	F	1	0	0	0	1	1

Comparison of nearby schools to Sun Valley Charter School

Total Schools	FY 2014 Letter Grade	Number of Charter Schools	FY 2017 AzMERIT Greater than Sun Valley Charter School	
			ELA (>36%)	Math (>27%)
16	A	7	9	14
29	B	9	3	20
28	C	4	1	6
12	D	1	0	3
3	F	1	0	0
Total Number of Schools (Percentage of total)				
88		22 (25%)	13 (15%)	43 (49%)

Enrollment and Demographic Data

100th day ADM for FY 2014 – FY 2017, and FY 2018 ADM as of October 4, 2017.



2016-2017 Subgroup Data	
Free and Reduced Lunch	49%
English Language Learners	10%
Special Education	12%