Excalibur Charter School, Inc. - Entity ID 79214

School: Excalibur Charter School and Avalon Elementary

Renewal Executive Summary

Performance Summary

During the five-year interval review of the charter, Excalibur Charter School, Inc. was required to submit a Performance Management Plan (PMP) as an intervention because schools operated by the charter holder did not meet the academic expectations set forth by the Board. At the time Excalibur Charter School, Inc. became eligible to apply for renewal, the charter holder again did not meet the academic performance expectations of the Board as set forth in the Performance Framework and was required to submit a Demonstration of Sufficient Progress (DSP) as part of the renewal application package. The charter holder was able to demonstrate the school is making sufficient progress toward the Board's expectations through the submission of the required information or evidence reviewed during an on-site visit. In the most recent fiscal year for which there is State assessment data available, Avalon Elementary and Excalibur Charter School received overall ratings of "Does Not Meet" the Board's academic standards.

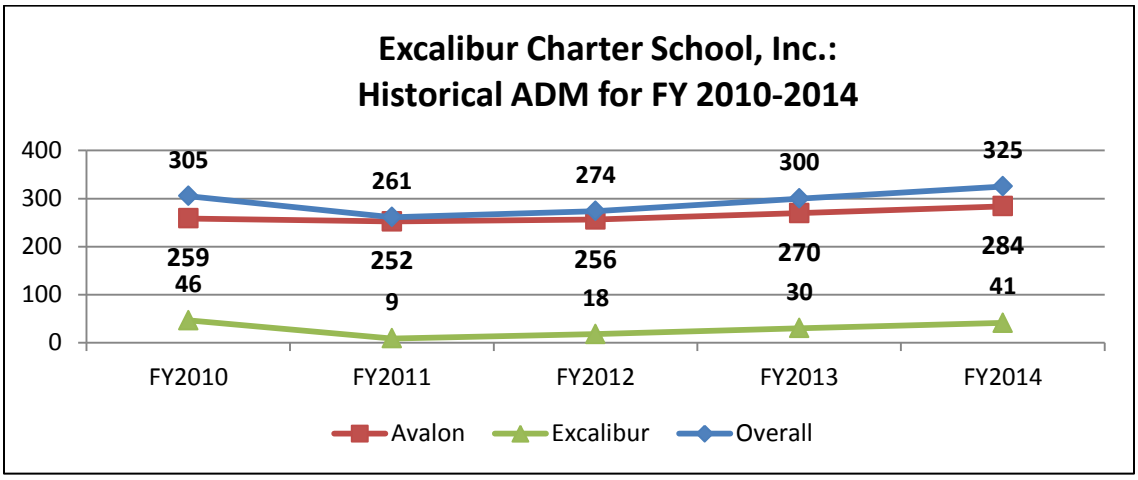
The charter holder did not meet the financial performance expectations of the Board as set forth in the Performance Framework and was required to submit a financial performance response. Staff's evaluation of the response resulted in zero "Acceptable" and four "Not Acceptable" determinations.

The charter holder's organizational membership on file with the Board was not consistent with the information on file with the Arizona Corporation Commission and the charter holder was required to submit the Organizational Membership portion of the Detailed Business Plan Section of the renewal application. The renewal application package submitted by the charter holder provides evidence of organizational membership alignment as required in the application.

The charter holder did have compliance matters, including action taken by the Board in November 2011 and by the Arizona State Retirement System in fiscal year 2010.

Profile

Excalibur Charter School, Inc. operates two schools serving grades K-12 in Apache Junction. The graph below shows the charter holder's actual 100th day average daily membership (ADM) for fiscal years 2010-2014.



A dashboard representation of Avalon Elementary's academic outcomes, based upon the indicators and measures adopted by the Board, is provided below.

Avalon Elementary

		2012 Traditional Elementary School (K-8)			2013 Traditional K-12 School (K to 9)		
1. Growth		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
1a. SGP	Math	34	50	12.5	42.5	50	10
	Reading	34	50	12.5	48	50	10
1b. SGP Bottom 25%	Math	34	50	12.5	68	100	10
	Reading	36.5	50	12.5	68.5	100	10
2. Proficiency		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
2a. Percent Passing	Math	41 / 64.6	50	7.5	40.2 / 64.6	25	7.5
	Reading	62 / 76.9	50	7.5	72.3 / 78.4	50	7.5
2b. Composite School Comparison	Math	-22.2	25	7.5	-18.8	25	5
	Reading	-14.5	50	7.5	-2.6	50	5
2c. Subgroup ELL	Math	NR	0	0	25 / 40.2	50	2.5
	Reading	NR	0	0	83.3 / 52.6	75	2.5
2c. Subgroup FRL	Math	38 / 55.2	50	3.75	37 / 55.4	25	2.5
	Reading	61 / 69.3	50	3.75	71 / 71	75	2.5
2c. Subgroup SPED	Math	14 / 27.6	50	3.75	21.4 / 24.7	50	2.5
	Reading	14 / 36	50	3.75	35.7 / 39.3	50	2.5
3. State Accountability		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
3a. State Accountability		D	25	5	C	50	5
4. Graduation		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
4a. Graduation		NR	0	0	NR	0	0
Overall Rating		Overall Rating			Overall Rating		
Scoring for Overall Rating 89 or higher: Exceeds Standard <89, but > or = to 63: Meets Standard <63, but > or = to 39: Does Not Meet Standard Less than 39: Falls Far Below Standard		47.5		100	58.82		85

A dashboard representation of Excalibur Charter School's academic outcomes, based upon the indicators and measures adopted by the Board, is provided below.

Excalibur Charter School

		2012 Small High School (9-12)			2013 Small High School (9 to 12)		
1. Growth		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
1a. SGP	Math	NR	0	0	28	25	15
	Reading	NR	0	0	47	50	15
1b. SGP Bottom 25%	Math	NR	0	0	NR	0	0
	Reading	NR	0	0	NR	0	0
2. Proficiency		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
2a. Percent Passing	Math	35 / 31.4	75	10	38.7 / 31.2	75	10
	Reading	69 / 59.7	75	10	76.5 / 69.5	75	10
2b. Composite School Comparison	Math	2.2	75	7.5	4.9	75	7.5
	Reading	10.2	75	7.5	3.9	75	7.5
2c. Subgroup ELL	Math	NR	0	0	NR	0	0
	Reading	NR	0	0	NR	0	0
2c. Subgroup FRL	Math	47 / 31.4	75	7.5	42.9 / 31.9	75	15
	Reading	64 / 58.8	75	7.5	NR	0	0
2c. Subgroup SPED	Math	NR	0	0	NR	0	0
	Reading	NR	0	0	NR	0	0
3. State Accountability		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
3a. State Accountability		C	50	5	D	25	5
4. Graduation		Measure	Points Assigned	Weight	Measure	Points Assigned	Weight
4a. Graduation		NR	0	0	NR	0	0
Overall Rating		Overall Rating			Overall Rating		
Scoring for Overall Rating 89 or higher: Exceeds Standard <89, but > or = to 63: Meets Standard <63, but > or = to 39: Does Not Meet Standard Less than 39: Falls Far Below Standard		NR		55	58.82		85

I. Success of the Academic Program

The FY2013 overall rating for Avalon Elementary on the Board's academic performance measures was 58.82 including points received for the FY2013 letter grade of C as reported by the Arizona Department of Education. The FY2012 overall rating for the school on the Board's academic performance measures was 47.5 including points received for the FY2013 letter grade of D as reported by the Arizona Department of Education.

The FY2013 overall rating for Excalibur Charter School on the Board's academic performance measures was 58.82 including points received for the FY2013 letter grade of D as reported by the Arizona

Department of Education. The FY2012 overall rating for the school on the Board's academic performance measures was NR including points received for the FY2013 letter grade of C as reported by the Arizona Department of Education.

The following is a timeline of activities that have occurred related to the academic performance of Excalibur Charter School, Inc.:

July 2011: Excalibur Charter School, Inc. was notified that the charter holder was required to submit a Performance Management Plan on or before September 1, 2011 for the five-year interval review because the schools operated by the charter holder, did not meet the academic expectations set forth by the Board.

September, 2011: Excalibur Charter School, Inc. timely submitted a Performance Management Plan (portfolio: i. Performance Management Plan).

January, 2013: The Board released 2012 Academic Dashboards; Avalon Elementary received an overall rating of "Does Not Meet" the Board's academic standards and Excalibur Charter School received an overall rating of "NR" and Excalibur Charter School, Inc. did not meet the Board's academic performance expectations. The charter holder was assigned a Demonstration of Sufficient Progress (DSP) for the schools as part of an annual reporting requirement (portfolio: h. FY12 DSP Submission).

August, 2013: Following a preliminary evaluation of the FY2012 DSP, Board staff conducted a site visit on August 1, 2013 to meet with the schools' leadership. The charter holder was able to submit additional evidence for 48 hours after the site visit (portfolio: g. FY12 DSP Site Visit Evidence List).

August, 2013: The Board released FY2013 Academic Dashboards; Avalon Elementary received an overall rating of "Does Not Meet" the Board's academic standards and Excalibur Charter School received an overall rating of "Does Not Meet" the Board's academic standards and Excalibur Charter School, Inc. did not meet the Board's academic performance expectations. The charter holder was not assigned a DSP as part of an annual reporting requirement because a final evaluation of the FY2012 DSP had not yet been completed and the charter holder would become eligible for renewal within the fiscal year.

September, 2013: Board staff completed a final evaluation (portfolio: f. FY2012 DSP Evaluation Instrument) of the charter holder's FY2012 DSP and made the evaluation available to the charter holder. In that final evaluation of the FY2012 DSP, Board staff determined that the charter holder's DSP was sufficient in all areas. The findings contained in the final evaluation of the FY2012 DSP were grounded in a limited evaluation of the schools' evidence as compared to the evaluation used in completing final evaluation of the Renewal DSP submitted as part of the renewal application package.

December, 2013: Board staff provided the charter holder, through its authorized representative, Mr. Michael McCord, with Renewal Notification Information, which included notification of the renewal process, the date on which the charter holder would become eligible to apply for renewal (December 30, 2013), the deadline date on which the renewal application package would be due to the Board (March 30,2013), information on the availability of the charter holder's renewal application as well as instruction on how to access the renewal application, and notification of the requirement to submit Renewal DSPs as components of its renewal application package because the charter holder did not meet the academic performance expectations set forth by the Board.

March, 2014: A renewal application package with Renewal DSPs for Avalon Elementary and Excalibur Charter School was timely submitted by the charter representative (portfolio: e. Renewal DSP Submissions).

Renewal Application Package DSPs

Following a preliminary evaluation of the DSPs, staff conducted a site visit on April 25, 2014 to meet with the schools' leadership, as selected by the schools, to confirm evidence of the processes described in the DSPs and review additional evidence to be considered in the final evaluation (presented in the charter holder's renewal portfolio: c. DSP Evaluation Instrument and d. Renewal DSP Site Visit Inventory) of the charter holder's DSP submissions. The following representatives of charter holder were present at the site visit:

Name	Role
Janette Benzinger	Student Services
Michelle Phillips	High School Teacher
Kris Johnson	Grants
Michael McCord	Executive Director

The DSPs submitted by Excalibur Charter School, Inc. for Excalibur Charter School and Avalon Elementary were required to address the areas (curriculum, monitoring instruction, assessment, and professional development) for the measures for which the charter holder was required to provide a response. The charter holder was provided a copy of the initial evaluation prior to the site visit and informed that areas initially evaluated as not acceptable could be addressed with additional evidence at the time of the visit. The charter holder also had 48 hours following the site visit to submit relevant evidence.

After considering information in the DSPs, evidence provided at the time of the site visit, and additional evidence submitted following the site visit Board staff finds that, the charter holder demonstrated evidence of a sustained improvement plan at the elementary school that includes implementation of a curriculum that contributes to increased student growth and proficiency, implementation of a plan for monitoring the integration of the Arizona's College and Career Ready (ACCR) Standards into instruction, implementation of a plan for monitoring and documenting increases in student growth and proficiency, and implementation of a professional development plan that contributed to increased student growth and proficiency.

At the high school, the charter holder has provided evidence of implementation of a professional development plan, but has not provided evidence of a sustained improvement plan that includes implementation of a curriculum that contributes to increased student growth and proficiency, implementation of a plan for monitoring the integration of the ACCR Standards into instruction, implementation of a plan for monitoring and documenting increases in student growth and proficiency, or increasing the percent of entering ninth graders who graduate from high school in four years.

For the elementary school, the charter holder provided data and analysis that demonstrates maintained or improved academic performance based on data generated from valid and reliable assessment sources. The data and analysis demonstrates maintained improvement in academic performance in math and improved academic performance in reading.

For the high school, the charter holder did not provide data and analysis that demonstrates maintained or improved academic performance based on data generated from valid and reliable assessment sources. Rather, the data and analysis demonstrates some improvement in the academic performance of students in reading, but decline in the academic performance of students in math.

The charter holder did not provide data for ELL students since the schools currently do not serve any ELL students.

Based on the findings summarized above and described below, staff determined that the charter holder demonstrated sufficient progress towards meeting the Board's academic performance expectations for the elementary school.

However, staff determined that the charter holder did not demonstrate sufficient progress towards meeting the Board's academic performance expectations for the high school.

A description of the findings for each required area as evaluated is provided below:

Curriculum:

For the elementary school, in the area of curriculum, Excalibur Charter School, Inc.'s DSP was evaluated as Meets. The charter holder provided evidence of a sustained improvement plan that includes implementation of a curriculum that contributes to increased student growth and proficiency. Specifically, the charter holder provided evidence of a system to create, implement, evaluate and revise curriculum aligned with ACCR Standards with clearly defined and measurable implementation across the school. For the elementary school, the charter holder's demonstration of sufficient progress in the area of curriculum is acceptable.

For the high school, in the area of curriculum, Excalibur Charter School, Inc.'s DSP was evaluated as Approaches. The charter holder did not provide evidence of a sustained improvement plan that includes implementation of a curriculum that contributes to increased student growth and proficiency. Rather, the charter holder provided evidence of a fragmented approach that the school uses to create, implement, evaluate, and revise school curriculum, aligned with ACCR Standards. The approach lacks cohesiveness and alignment with other school improvement efforts. For the high school, the charter holder's DSP in the area of curriculum is not acceptable.

- The charter holder must provide evidence of implementation of a systematic process the school uses to create/adopt curriculum. Sufficient evidence will demonstrate how and when the school evaluates curriculum options, what findings the school makes about curriculum options, and who is involved in the curriculum adoption process.
    - For the elementary school, the charter holder provided "Curriculum Committee Meeting" and "Curriculum Teacher Evaluation" documents. The meeting notes provided a summary of meetings discussing the concerns and gaps regarding the math curriculum. The curriculum evaluation documents evaluate different curriculum resources using criteria rated on a points scale and teachers comments regarding positive and negative aspects for each curriculum resource evaluated. These documents demonstrate evidence of a system for adopting curriculum.
    - For the high school, the charter holder did not provide documents or evidence of a system to create/adopt curriculum.
- The charter holder must provide evidence that the school has in place a system for implementing the curriculum consistently across the school. Sufficient evidence will demonstrate the school utilizes tools that identify what must be taught, the expected pacing, strategies, methods, and activities, and communicated expectations for the consistent use of these tools.
    - For the elementary school, the charter holder provided "Curriculum Maps and Lesson Plans" across grade levels. These documents provided evidence of alignment of lesson plans to

curriculum maps. The curriculum maps and lesson plans both aligned to ACCR Standards. Samples of curriculum maps were provided across grade levels. These documents demonstrate evidence of a system for implementing the curriculum consistently across the elementary school.

- For the elementary school, the charter holder provided "Professional Development Documents; Task Analysis, Handout 5". These documents establish common expectations for curriculum mapping and lesson planning. These documents, which include templates, were provided to teachers. These documents demonstrate evidence of a system for implementing the curriculum consistently across the elementary school.
- For the elementary school, the charter holder provided "Walk-Through Observations". These documents provide evidence of monitoring the implementation of the standards through cross checks of lesson plans to the standards being taught during observed lesson. Template and completed samples were reviewed. These documents demonstrate a system for implementing the curriculum consistently across the school.
- For the high school, the charter holder provided "Graduation Plan Progress, ECAP, Modify Enrollments-Schedule". These documents identify the process for assigning students to courses and ensuring that all students are enrolled in Math and English course at all times. The documents provide evidence of a process for enrolling students in appropriate courses.
- For the high school, the charter holder provided "Acellus Course Binder". The documents describe the division of courses into lessons and units aligned to the ACCR Standards. These documents describe how student pacing is monitored to ensure timely completion of lessons and courses. The documents provide evidence of a process for process for implementing some of the high school courses.
- For the high school, the charter holder provided "English 9A and 9B daily pacing and all courses semester pacing". These documents consist of pacing guides that identify the pace necessary for students to complete lessons timely. The documents provide evidence of a process for implementing some of the high school courses.
- For the high school, the charter holder provided "Progress Report" and "Progress Report Explanation". The documents describe the process for monitoring student pacing of lesson completion. The documents provide evidence of monitoring of student pacing by teachers to ensure timely completion of courses. These documents provide evidence of a process implementing curriculum.

- The charter holder must provide evidence of implementation of a systematic process for evaluating and revising curriculum. Sufficient evidence will demonstrate how the school evaluates how effectively the curriculum enables students to master the standards, identifies gaps in the curriculum, and demonstrates how the school is addressing curricular gaps.
  - For the elementary school, the charter holder provided "Subject Grade Level Curriculum Analysis and Revision Document". This document identifies a process for using AIMS data to identify areas, by standards, for revision; gaps; curricular needs; and identifies actions to be taken in response to identified needs. This document demonstrates a system for evaluating and revising curriculum for the elementary school.
  - For the high school, the charter holder provided "Excalibur Eng. 9A syllabus". The document reflects recent revisions to the curriculum. No evidence was provided to document how the

need for revisions was identified, or the process used to make revisions. The document demonstrates the beginning stages of a process for evaluating and revising curriculum for the high school.

  - For the high school, the charter holder provided "February Agenda", "February Minutes", "April Agenda", and "April Minutes". The February minutes describe a change from online to a blended approach to instruction for next year. The transition to a blended curriculum is also discussed in the April minutes. No evidence was provided to document the process used to determine the need to make this change to the program of instruction, how the school evaluated the curriculum effectiveness, identified gaps in the curriculum, and/or addressed curricular gaps. These documents demonstrate a fragmented approach to evaluating and revising curriculum for the high school.

- The charter holder must demonstrate implementation of a curriculum aligned to the ACCR Standards.
  - For the elementary school, the charter holder provided "Curriculum Maps and Lesson Plans" across grade levels. These documents provide evidence of alignment of lesson plans to curriculum maps. The curriculum maps and lesson plans both align to ACCR Standards. Samples of curriculum maps were provided across grade levels. These documents provide evidence that the school has implemented a curriculum aligned to the ACCR Standards.
  - For the high school, the charter holder provided "Acellus Course Binder". The documents demonstrate the division of courses into lessons and units are aligned to the ACCR Standards.

- The charter holder must demonstrate implementation of a curriculum adapted to meet the needs of subgroup populations. Sufficient evidence will demonstrate there is curriculum intended to provide differentiated materials, activities, and/or strategies for struggling students within the subgroups.
  - For the elementary school, the charter holder provided "Lesson Plans". These documents identify a variety of strategies and adaptation to lessons to meet the needs of students. These include structural components such as small groups meeting with teachers on a rotating schedule, and modifications and adjustments to instructional resources such as leveled readers. These documents provide evidence of a system for adapting curriculum to meet the needs of subgroup populations.
  - For the elementary school, the charter holder provided "Student Information Sheets". These documents are used for communication and collaboration between the special education teacher and classroom teachers. The documents identify areas of student strengths and student difficulties, individual student data to identify student progress, and strategies to address student strengths and student difficulties. A template and completed student forms were reviewed. These documents demonstrate a system for adapting curriculum to meet the needs of student with disabilities.
  - For the elementary school, the charter holder provided "Reading/Math Lab Daily Schedule", and "Block Schedule". These documents identify the schedule for providing supplemental instruction in reading and math for students in the bottom 25%. The schedules include blocks of time by grade level and identify when supplemental instruction occurs. The block schedule identifies the daily schedule for each grade level and includes time scheduled

specific to supplemental instruction such as small group intervention, and RTI. These documents demonstrate a system for adapting curriculum to meet the needs of students in the bottom 25%.

- For the elementary school, the charter holder provided "Avalon Elementary Data Meetings". The minutes identify discussion of data and intervention plans for subgroup students. Strategies and items to monitor for follow-up for individual students are included. These documents demonstrate a system for adapting curriculum to meet the needs of students in subgroups.
- For the high school, the charter holder provided "Math Schedule". The math schedule identifies times when individual students receive additional support. The document does not identify strategies or adjustments to curriculum made to meet the needs of students. The document demonstrates a fragmented approach to adapting curriculum to meet the needs of students in subgroups.
- For the high school, the charter holder provided "Galileo Data Pictures and Student Reflection". The Galileo data provides evidence that Galileo assessment results are used to monitor student progress. The student reflection identifies that students reflect on their progress or lack of progress. While students are asked to identify what they think they need to do to improve, no documentation or evidence of a system for providing support or adaptation of the curriculum for students was provided. These documents demonstrate a fragmented approach to adapting curriculum to meet the needs of students in subgroups.

Monitoring Instruction:

For the elementary school, in the area of monitoring instruction, Excalibur Charter School, Inc.'s DSP was evaluated as Meets. The charter holder provided evidence of a sustained improvement plan that includes implementation of a plan for monitoring the integration of the ACCR Standards into instruction. Specifically, the charter holder provided evidence of a system to monitor the integration of ACCR Standards into instruction and evaluate the instructional practices of the teachers. The system provides for some analysis and feedback to further develop the system. For the elementary school the charter holder's DSP in the area of monitoring instruction is acceptable.

For the high school, in the area of monitoring instruction, Excalibur Charter School, Inc.'s DSP was evaluated as Falls Far Below. For the high school, the charter holder did not provide evidence of a sustained improvement plan that includes implementation of a plan for monitoring the integration of the ACCR Standards into instruction. Rather, the charter holder provided no evidence of monitoring and evaluating standards and instructional practices. For the high school, the charter holder's DSP in the area of monitoring instruction is not acceptable.

- The charter holder must provide evidence of implementation of a system to monitor the integration of ACCR Standards into instruction. Sufficient evidence will demonstrate that the school ensures all grade level standards are taught within the school year in all classrooms and that teachers implement an ACCR Standards-aligned curriculum with fidelity.
    - For the elementary school, the charter holder provided "Walk-Through Observation". This document demonstrates monitoring of implementation of the standards through cross checks of lesson plans to the standard being taught when lessons are observed. A template and completed samples were reviewed. These documents demonstrate a system for monitoring the integration of ACCR Standards into instruction.

- For the high school, the charter holder did not provide any documentation or evidence to demonstrate a system for monitoring the integration of ACCR Standards into instruction.

- The charter holder must provide evidence of implementation of a system to evaluate the instructional practices of teachers. Sufficient evidence will demonstrate that the school evaluates the quality of instruction and identifies the strengths, weaknesses, and learning needs of teachers.
  - For the elementary school, the charter holder provided "Full-Cycle Process". This document contains a diagram of the steps in the process for monitoring and evaluating teachers. The formative portion of the cycle includes pre-observation conferences, scheduled observations with conferences, and drop-in observations with feedback. This document demonstrates a system to evaluate the instructional practices of teachers.
  - For the elementary school, the charter holder provided "Protocol for Pre-Observation Conference and Completed Pre-Observation Form". The protocol addresses the curriculum, sequencing of the observed lesson, learning outcomes for the observed lesson, differentiation of instruction for students, and how student learning will be assessed. A template and completed forms were reviewed. These documents demonstrate a system to evaluate the instructional practices of teachers.
  - For the elementary school, the charter holder provided "Danielson Formal Evaluation System/Framework". The document identified the evaluation process and rubrics that are used for formal teacher evaluations. This document demonstrates a system to evaluate the instructional practices of teachers.
  - For the elementary school, the charter holder provided "Teacher Evaluation samples". The document identified the charter holder's process for evaluating the instructional quality of teachers during observations. Teachers are observed and evaluated against 7 standards. Samples of teacher evaluations and the rubrics used for scoring were provided. These documents demonstrate a system to evaluate the instructional practices of teachers.
  - For the high school, the charter holder did not provide any documentation or evidence to demonstrate a system to evaluate the instructional practices of teachers.

- The charter holder must provide evidence that school leaders conduct some analysis and provide some feedback to further develop the system. Sufficient evidence will demonstrate that teachers receive the feedback, have access to the resources necessary to address identified weaknesses and learning needs, and/or the school ensures teacher development is ongoing.
  - For the elementary school, the charter holder provided "Full-Cycle Process". This document contains a diagram of the steps in the process for monitoring and evaluating teachers. The formative portion of the cycle includes pre-observation conferences, scheduled observations with conferences, and drop-in observations with feedback. The summative portion of the cycle includes teacher self-evaluation, summative conference, and professional growth plan for teachers. Between the formative and summative portions of the cycle, data collection occurs. This document demonstrates a system for analysis and feedback to further develop the system.
  - For the elementary school, the charter holder provided "Teacher Evaluation samples". These documents provide evidence of the implementation of the charter holder's process for evaluating the instructional quality of teachers during observations. After the observation, the results are reviewed with the teachers and teachers set personal growth

goals. Teachers sign the scoring results to indicate that they have received the results of the observation and set goals. This document demonstrates a system for analysis and feedback to further develop the system.

  - For the elementary school, the charter holder provided, "Teacher Improvement Plan" and "Re-evaluation". These documents describe a teacher that was placed on an improvement plan and subsequent observations to monitor progress toward improvement in the areas identified for improvement. These documents demonstrate a system for analysis and feedback to further develop the system.
  - For the high school, the charter holder did not provide any documentation or evidence to demonstrate a system for analysis and feedback to further develop the system.

- The charter holder must provide evidence of implementation of a system to evaluate the instructional practices of teachers that addresses the needs of students with proficiency in the bottom 25%, ELL students, FRL students, and students with disabilities. Sufficient evidence will demonstrate that the school evaluates the quality of instruction and identifies the strengths, weaknesses, and learning needs of teachers in relation to meeting the needs of students with proficiency in the bottom 25%, ELL students, FRL students, and students with disabilities.
  - For the elementary school, the charter holder provided "Avalon Elementary Data". This document includes minutes of data meetings discussing the strategies teachers use to address the needs of students in subgroups. Minutes indicate that during the meetings the effectiveness of strategies is evaluated and changes and adjustments are recommended as needed. This document demonstrates a system to evaluate the instructional practices of teachers to address the needs of students in subgroups.
  - For the elementary school, the charter holder provided "Intervention Strategies Documentation Form" and "Learning Behavior Problem Checklist by Hawthorne". These documents are used to monitor the implementation of strategies used with students in subgroups. Teachers are monitored on the use of the checklist for identifying appropriate strategies based on identified student need. These documents demonstrate a system to evaluate the instructional practices of teacher to address the needs of students in subgroups.
  - For the high school, the charter holder did not provide any documentation or evidence to demonstrate a system to evaluate the instructional practices of teacher to address the needs of students in subgroups.

Assessment:

For the elementary school, in the area of assessment, Excalibur Charter School, Inc.'s DSP was evaluated as Meets. The charter holder provided evidence of a sustained improvement plan that includes implementation of a plan for monitoring and documenting student proficiency. Specifically, the charter holder provided evidence of comprehensive assessment system based on clearly defined performance measures aligned with the curriculum and instructional methodology that includes data collection from multiple assessments, and data review teams. For the elementary school, the charter holder's DSP in the area of assessment is acceptable.

For the high school, in the area of assessment, Excalibur Charter School, Inc.'s DSP was evaluated as Approaches. The charter holder did not provide evidence of a sustained improvement plan that includes implementation of a plan for monitoring and documenting student proficiency. Rather, the charter

holder provided evidence of an assessment approach that is not comprehensive nor aligned with the curriculum and instructional practices. The evidence demonstrated that little data is collected and data is not used to make instructional decisions. For the high school, the charter holder's DSP in the area of assessment is not acceptable.

- The charter holder must provide evidence of the implementation of a comprehensive assessment system. Sufficient evidence will demonstrate the school regularly and timely assesses students in a manner that is aligned with the curriculum in order to monitor student progress.
    - For the elementary school, the charter holder provided "Avalon/Excalibur Calendar" and "Galileo Class Calendars". These documents identify the dates within the school year for scheduled Galileo benchmark testing. These documents demonstrate Galileo benchmark testing is utilized as a piece of a comprehensive assessment system that includes data collection from multiple assessments to regularly and timely assesses students.
    - For the high school, the charter holder provided "Galileo 2014 High School Testing Schedule". The document identifies the dates within the school year for scheduled benchmark testing. The document demonstrates a component of a comprehensive assessment system that includes data collection from multiple assessments.
    - For the high school, the charter holder provided "Acellus Course Binder". The documents describe the division of courses into lessons and units aligned to the ACCR standards. These documents provide evidence of assessments that are part of the courses. These documents in conjunction with the Galileo benchmark testing demonstrate a comprehensive assessment system that is aligned with the curriculum and instructional methodologies.
- The charter holder must provide evidence that data from these assessments is analyzed and utilized. Sufficient evidence will demonstrate how and when the school analyzes assessment data, what findings the school makes from assessment data, who is involved in the analysis of assessment data, and how that analysis is used to inform and adapt instruction.
    - For the elementary school, the charter holder provided "Avalon Data Meetings". This document includes minutes of data meetings discussing analysis of Galileo and DIBELS assessment results. The minutes also indicate that during the meetings the effectiveness of strategies is evaluated, changes and adjustments to instruction are recommended, and changes to small group composition are made as needed. Minutes from a range of dates throughout the school year were provided. These documents demonstrate a system of data review teams to analyze data.
    - For the high school, the charter holder provided "Galileo Data Pictures and Student Reflection". The Galileo data assessment results are used to monitor student progress. The student reflection identifies that students reflect on their progress or lack of progress. While students are asked to identify what they think they need to do to improve, no documentation or evidence of a system for teachers analyzing student data or using the results to make instructional decisions was provided. These documents do not provide evidence about how the assessment data is analyzed to inform and adapt instruction.
    - For the high school, the charter holder provided "AIMS tracking log/ Graduation test requirement". The documents demonstrate an approach to monitoring student AIMS data, but do not demonstrate how data from a comprehensive assessment system is used to timely monitor student progress.

- The charter holder must provide evidence of implementation of an assessment system that meets the needs of students with proficiency in the bottom 25%, ELL students, FRL students, and students with disabilities. Sufficient evidence will demonstrate how the assessment system assesses students within the subgroups according to their needs.
    - For the elementary school, the charter holder provided "Avalon Data Meetings". This document includes minutes of data meetings discussing analysis of Galileo and DIBELS assessment results. The minutes also indicate that during the meetings the effectiveness of strategies is evaluated, changes and adjustments to instruction are recommended, and changes to address the needs of students in subgroups are made as needed. Minutes from a range of dates throughout the school year were provided. These documents demonstrate a comprehensive assessment system that assesses students within the subgroups according to their needs.
    - For the elementary school, the charter holder provided "DIBELS data". The documents contain assessment results and indicate frequent progress monitoring for students in subgroups. These documents demonstrate a comprehensive assessment system that assesses students within the subgroups according to their needs.
    - For the high school, the charter holder does not provide any documentation or evidence to demonstrate an assessment system that assesses students within the subgroups according to their needs.

Professional Development:

In the area of professional development, Excalibur Charter School, Inc.'s DSPS for the elementary and high school were evaluated as Meets. The charter holder provided evidence of a sustained improvement plan that includes implementation of a professional development plan that contributed to increased student growth and proficiency. Specifically, the charter holder provided evidence of comprehensive professional development plan that is aligned with teacher learning needs. The plan includes follow-up and monitoring strategies. The plan focuses on areas of high importance and supports high quality implementation. For the elementary school, the charter holder's DSP in the area of professional development is acceptable.

- The charter holder must provide evidence of implementation of a comprehensive professional development plan. Sufficient evidence will demonstrate that the plan was developed to address teacher learning needs and areas of high importance.
    - For the elementary school, the charter holder provided "Avalon K-8 Professional Development 2013-2014". This document identifies professional development topics scheduled throughout the 2013-2014 school year which are aligned to implementing the new common core standards and instructional strategies intended to improve student achievement. This document demonstrates a comprehensive professional development plan that is aligned with teacher learning needs.
    - The charter holder provided "PD Surveys". This document contained the results of a survey sent to teachers to identify topics teachers felt were of high importance. The topics identified in the survey align to topics offered in PD sessions throughout the year. This document demonstrates a comprehensive professional development plan that is aligned with teacher learning needs.

- The charter holder provided a "Subject Grade Level Curriculum Analysis and Revision Document". This document demonstrates a process for analyzing AIMS data to identify areas of teacher development need. The needs identified in this analysis align to areas of professional development offered during this school year. The document demonstrates a comprehensive professional development plan that is aligned with teacher learning needs.

- The charter holder must provide evidence of implementation of a system that supports high quality implementation of the information and strategies learned through the professional development plan. Sufficient evidence will demonstrate how the charter holder provides access to resources necessary to implement the information and strategies, and/or otherwise supports teachers in planning to and implementing the information and strategies.
  - The charter holder provided "Teaching Reading Effectively Professional Development Training Materials". The materials were provided to teachers as part of professional development to support implementation and included activities, worksheets, and other hands on materials. These documents demonstrate a professional development plan that support high quality implementation.
  - The charter holder provided "Close Reading in the Classroom Binder". The materials were provided to teachers as part of professional development to support implementation and included activities, worksheets, and other hands on materials. These documents demonstrate a professional development plan that support high quality implementation.
  - The charter holder provided "Task Analysis PD Binder". The materials were provided to teachers as part of professional development to support implementation and included activities, worksheets, and other hands on materials. These documents demonstrate a professional development plan that support high quality implementation.
- The charter holder must provide evidence of implementation of a system to follow-up on and monitor the implementation of the strategies and information learned through the professional development plan. Sufficient evidence will demonstrate how implementation is observed and evaluated and how the school ensures teacher development is ongoing in relation to the information and strategies learned through the professional development plan.
  - The charter holder provided "Principal's and Assistant Principal's evaluation". These documents contain the evaluations of the school leaders by an outside evaluator. The evaluation rates performance in several areas, including instructional effectiveness and personnel management. These two categories focus on providing support for teachers toward professional growth goals, and professional development aligned to teacher needs. And the evaluation provides observations/evidence that support the evaluation. These documents demonstrate a professional development plan that provides follow-up and monitoring strategies.
- The charter holder must provide evidence of implementation of comprehensive professional development plan that meets the needs of students with proficiency in the bottom 25%, ELL students, FRL students, and students with disabilities. Sufficient evidence will demonstrate how the professional development plan addresses teacher weaknesses and learning needs and areas of high importance in relation to students within the subgroups according to their needs.
  - For the elementary school, the charter holder provided "Avalon K-8 Professional Development 2013-2014". This document identifies the professional development topics

scheduled for the 2013-2014 school year, which include students with disabilities training, and training pertaining to instructional strategies for struggling students. This document demonstrates a professional development plan that addresses learning needs and areas of high importance to students within subgroups.

- The charter holder provided "Close Reading in the Classroom Binder". These documents were provided to teachers to support high quality implementation of close reading strategies as part of instruction. The close reading strategies support instruction that addresses the needs of students in the bottom 25% and FRL students. These documents demonstrate a professional development plan that addresses learning needs and areas of high importance to students within subgroups.
- The charter holder provided, "Sept 20, 2013 Professional Development Sign-in and Summary" and "July 15th-19th professional development sign-in". These documents demonstrate teacher attendance at professional development sessions for professional development to support instruction of students in subgroups. These documents demonstrate a professional development plan that addresses learning needs and areas of high importance to students within subgroups.

Increasing Graduation Rate:

In the area of increasing graduation rate, Excalibur Charter School, Inc.'s DSP was evaluated as Approaches. The charter holder did not provide evidence of a sustained improvement plan that includes increasing the percent of entering ninth graders who graduate from high school in four years. While the charter holder's evidence demonstrated that the charter holder has implemented strategies to ensure students in grades 9-12 graduate on time, the school did not present data that demonstrates success in ensuring students graduate on time. The charter holder's DSP in the area of increasing graduation rate is not acceptable.

- The charter holder must provide evidence of strategies the school uses to ensure students in grades 9-12 graduate on time. These strategies should ensure that students have a plan to direct them in meeting graduation requirements that is kept up-to-date, and should include practices to address early academic difficulty.
  - The charter holder provided "Summer School Available". These documents identify the process used for students to identify courses to be taken during summer school. The document indicates that first priority goes to students that will not finish their current classes. These documents demonstrate efforts to assist students in earning credits toward graduation.
  - The charter holder provided "Graduation Plan Progress ECAP, Modify Enrollments-Schedule". These documents identify the process for assigning students to courses and ensuring that all students are enrolled in a math and English course at all times. The documents provide evidence of a process for enrolling students in courses based on credits needed to graduate. These documents demonstrate a strategy the school uses to ensure students in grade 9-12 graduate on time.
  - The charter holder provided "Excalibur Schedule" and "Math Schedule". These documents identify scheduled time available for students to receive additional support for their courses and to complete additional lessons. These documents demonstrate a strategy the school uses to ensure students in grade 9-12 graduate on time.

- The charter holder provided "Galileo Data Pictures and Student Reflection". The Galileo data provides evidence that Galileo assessment results are used to monitor student progress. The student reflection identifies that students reflect on their progress or lack of progress. Students are asked to identify what they think they need to do to improve. The documents demonstrate efforts to assist students in earning credits toward graduation.
- The charter holder provided "AIMS tracking log/Graduation test requirement". The documents provide evidence of a system for monitoring student AIMS data, and placing students in AIMS prep courses. These documents demonstrate a strategy the school uses to ensure students in grade 9-12 graduate on time.
- No data was provided to demonstrate success in ensuring students in grade 9-12 graduate on time.

Data:

For the elementary school, the charter holder provided data and analysis that demonstrates maintained or improved academic performance based on data generated from valid and reliable assessment sources. The data and analysis demonstrates maintained improvement in academic performance in math and improved academic performance in reading.

For the high school, the charter holder did not provide data and analysis that demonstrates maintained or improved academic performance based on data generated from valid and reliable assessment sources. Rather, the data and analysis demonstrates some improvement in the academic performance of students in reading, but decline in the academic performance of students in math.

The charter holder did not provide data for ELL students since the schools currently do not serve any ELL students.

- The charter holder must provide evidence of the effectiveness of their systems in each of the areas discussed above through the presentation of valid and reliable data and data analysis that demonstrates improved student growth and proficiency. Sufficient evidence will demonstrate the school's performance on the AIMS assessment, as reflected in the dashboard, is and will continue to improve as compared to prior years.
    - For the elementary school, the charter holder provided "Data Charts 2013 to 2014". This document clearly identifies a comparison of Galileo Pre Assessment data from 2013 and 2014 for reading and math. For math, the data demonstrates maintained improvement in the percentage of students scoring Meets or Exceeds. For 2013, 46% scored Meets or Exceeds; for 2014, 45% scored Meets or Exceeds. The data demonstrates an increase in the percentage of students scoring Meets or Exceeds in reading. For 2013, 64% scored Meets or Exceeds; for 2014, this increased to 71%.
    - For the elementary school, the charter holder provided "Bottom 25% Students Growth". This document identifies results of the comparative analysis of 2013 and 2014 Galileo assessment results for students in the bottom 25%. For math, 87% demonstrated growth. 50% of all students in the bottom 25% increased their scaled scores by at least 100 points. For reading, all students demonstrated growth, and 29% increased their scaled scores by at least 100 points.
    - For the high school, the charter holder provided "Data Charts – AIMS". The charts demonstrate an increase in scaled scores of students in reading and a decline in scale scores

for math. Reading scores increased from 540.3 to 681.8, and math scores declined from 459 to 453. No analysis was provided to describe the significance of the changes from 2013 to 2014.

II. Viability of the Organization

The charter holder did not meet the Board's financial performance expectations based on the fiscal year 2013 audit. The following table includes the charter holder's financial data and financial performance for the last three audited fiscal years. Interest expense was not entered in the table below for fiscal years 2011 and 2012 as this information was not disclosed in the audits.

Excalibur Charter School, Inc.

Financial Data				
	2013	2012	2011	
Statement of Financial Position				2010
Cash	$53,554	$68,397	$203,651	$63,397
Unrestricted Cash	$53,554	$68,397	$154,430	
Other Liquidity	-			
Total Assets	$2,951,765	$3,140,990	$3,123,632	
Total Liabilities	$3,505,385	$3,676,481	$3,669,962	
Current Portion of Long-Term Debt & Capital Leases	$84,167	$90,803	$75,000	
Net Assets	($553,620)	($535,491)	($546,332)	
Statement of Activities				
Revenue	$2,362,290	$2,156,477	$2,034,295	
Expenses	$2,380,419	$2,145,636	$2,084,379	
Net Income	($18,129)	$10,841	($50,084)	
Change in Net Assets	($18,129)	$10,841	($50,084)	
Financial Statements or Notes				
Depreciation & Amortization Expense	$143,168	$87,123	$203,796	
Interest Expense	$354,134	-	-	
Lease Expense	$13,800	$6,600	$16,303	

Financial Performance				
	2013	2012	2011	3-yr Cumulative
Near-Term Indicators				
Going Concern	No	No	Yes	N/A
Unrestricted Days Liquidity*	8.21	11.64	27.04	N/A
Default	No	No	No	N/A
Sustainability Indicators				
Net Income	($18,129)	$10,841	($50,084)	N/A
Cash Flow	($14,843)	($135,254)	$140,254	($9,843)
Fixed Charge Coverage Ratio	1.09	1.07	1.86	N/A

* For fiscal years 2011 and 2012, the field reflects the charter holder's performance under the financial framework's previous "Unrestricted Days Cash" measure.

The charter holder was required to submit a financial performance response based on the fiscal year 2013 audit (portfolio: k. Financial Response). Staff's evaluation of the financial performance response resulted in zero "Acceptable" and four "Not Acceptable" determinations (portfolio: j. Financial Response Evaluation).

While the charter holder did not meet the Board's financial performance expectations in fiscal years 2011, 2012 and 2013, the Demonstration of Sufficient Progress includes no indication that additional resources would be committed by the charter holder to developing systems that would result in improved academic performance.

III. Adherence to the Terms of the Charter

A. Compliance Matters Requiring Board or Other Agency Action

In November 2011, the Board voted to withhold 10% of the charter holder's monthly State aid apportionment for failure to timely submit the fiscal year 2011 audit. The withholding occurred for one month.

The charter holder failed to timely submit member and employer contributions to the Arizona State Retirement System (ASRS), which resulted in the ASRS garnishing the charter holder's monthly state aid in fiscal year 2010 as follows:

- August 2009 - $46,805.73
- November 2009 - $26,792.43
- May 2010 - $55,622.42

As of the most recent ASRS Delinquency Report available, which is dated May 14, 2014, the charter holder is current with submitting its member and employer contributions to ASRS.

B. Other Compliance Matters

The fiscal year 2010 audit identified an issue that required a corrective action plan (CAP). Specifically, the audit indicated that on January 19, 2011, the Internal Revenue Service (IRS) filed a Notice of Federal Tax Lien for $67,951 representing unpaid payroll taxes, interest and penalties for the second and third quarters of 2010. The audit further indicated the charter holder was attempting to work out a payment plan with the IRS. Additionally, the audit indicated the charter holder did not provide documentation to substantiate the charter holder is in good standing with the Arizona Department of Revenue or with state unemployment contributions. The charter holder submitted a satisfactory CAP, which included a copy of the charter holder's installment agreement with the IRS. The installment agreement identified the amount owed as of April 12, 2011 as $95,298.56 and required $3,000 monthly payments beginning May 10, 2011. The fiscal years 2011, 2012 and 2013 audits indicated that while the charter holder owed back taxes to the IRS, the charter holder was current with its obligations under its installment agreement and current fiscal year taxes. Therefore, no CAPs were required. The fiscal year 2012 audit identified an issue related to state unemployment contributions that required a CAP. Specifically, the charter holder did not report the correct unemployment tax rate on the first quarter 2012 form UC-18 to the Arizona Department of Economic Security. The reported rate was 2.62% and the correct rate was 6.26%, resulting in a difference in calculated tax of $8,182, according to the audit, which indicated a corrected return had not been filed as of June 30, 2012. The charter holder submitted a satisfactory CAP.

The fiscal years 2010 and 2011 audits identified fingerprinting issues that required CAPs. Specifically, the fiscal year 2010 audit indicated that one teacher and one contracted special education teacher did not have valid fingerprint clearance cards as of the testing date. The fiscal year 2011 audit indicated that one janitor had applied for but not received fingerprint clearance as of the testing date. The charter holder submitted satisfactory CAPs.

The fiscal years 2010 and 2011 audits identified financial record retention issues. Specifically, the fiscal year 2010 audit indicated that $11,688 in Title I ARRA (American Recovery and Reinvestment Act) expenditures could not be supported with vendor invoices. Since the Arizona Department of Education is the entity responsible for monitoring the use of federal funds, a CAP was not required by the Board. The fiscal year 2011 audit indicated the charter holder did not provide invoices or supporting documentation for review for 3 of 30 non-payroll expenses tested. The charter holder submitted a satisfactory CAP for the fiscal year 2011 issue.

The fiscal year 2010 audit identified a Classroom Site Fund (CSF) issue that required a CAP. Specifically, the audit indicated the carry forward CSF monies could not be verified because the charter holder could not support CSF expenditures for the year ended June 30, 2010 based on accounting records available at the time of audit. Accordingly, carry forward monies that should be on deposit for use in subsequent years are not identified. The charter holder submitted a satisfactory CAP.

In October 2011, the results of an on-site review of the *Elementary and Secondary Education Act (ESEA),* Johnson-O-Malley (JOM), Migrant, and Neglected or Delinquent programs identified deficiencies in some areas. The deficiencies were required to be corrected by October 2011. The deficiencies were reported by ADE as resolved in October 2011.

The fiscal years 2009 and 2010 audits identified a repeated audit issue involving the charter holder not preparing interim financial statements in accordance with GAAP without the help of its auditor. Additionally, the fiscal year 2009 audit identified a repeated audit issue involving the charter holder not timely filing its Annual Financial Report (AFR) and the fiscal year 2010 audit identified a repeated audit issue involving the charter holder not timely filing its Budget.

For the previous five fiscal years, the charter holder's failure to timely submit its annual audit, AFR and Budget is addressed in the "A. Compliance Matters Requiring Board or Other Agency Action" section and the preceding paragraph.

C. Charter Holder's Organizational Membership

Because the organizational membership on file with the Board was not consistent with the information on file with the Arizona Corporation Commission, the charter holder was required to submit the charter holder's Organizational Membership portion of the Detailed Business Plan Section. The charter holder provided evidence of the appropriate filing that aligns organizational membership on file with the Board and the Arizona Corporation Commission.

Board Options

Option 1: The Board may grant a conditional renewal which is a denial of the renewal unless specific provisions are included. Staff recommends the following language provided for consideration: I move that, having considered the statements of the representatives of the charter holder today and the contents of the renewal portfolio which includes the academic performance, the fiscal compliance, and legal and contractual compliance of the charter holder provided to the Board for consideration of this request for charter renewal, the Board has sufficient basis to deny the request for charter renewal and to not grant a renewal contract for Excalibur Charter School, Inc. on the grounds that the charter holder

failed to meet or make sufficient progress toward the academic performance expectations set forth in the performance framework as stated in the Renewal Executive Summary. All that taken into consideration, the charter holder operates one school for which the charter holder was able to demonstrate the school is making sufficient progress toward the academic performance expectations set forth in the performance framework as stated in the Renewal Executive Summary. Therefore, the Board will grant a renewal contract to Excalibur Charter School, Inc. for the continuation of that school, Avalon Elementary. The Board's grant of a renewal contract will not, however, include the school that was not able to demonstrate it is making sufficient progress toward the academic performance expectations set forth in the performance framework which is Excalibur Charter School.

Option 2: Notwithstanding staff's recommendation to grant a conditional renewal, the Board may determine that there is a basis to deny the renewal. The following language is provided for consideration: Having considered the statements of the representatives of the charter holder today and the contents of the renewal portfolio which includes the academic performance, the fiscal compliance, and legal and contractual compliance of the charter holder provided to the Board for consideration of this request for charter renewal, I move to deny the request for charter renewal and to not grant a renewal contract to Excalibur Charter School, Inc. on the bases that the charter holder failed to meet or make sufficient progress toward the academic performance expectations set forth in the performance framework as reflected in the Renewal Executive Summary and currently operates a school that has received an overall rating of "Does Not Meet Standard" or "Falls Far Below Standard" in both of the two most recent fiscal years for which there is State assessment data available.

Option3: Notwithstanding staff's recommendation to grant a conditional renewal, the Board may determine that there is a basis to approve the renewal as requested by the charter holder. The following language is provided for consideration: Renewal is based on consideration of academic, fiscal and contractual compliance of the charter holder. In this case, the charter holder did not meet the academic performance expectations set forth in the Board's performance framework but was able to demonstrate sufficient progress toward the Board's expectations when: [*provide specific findings related to curriculum, monitoring of instruction, assessment, professional development, and/or data*]. Additionally, the Board has adopted an academic performance framework that allows for additional consideration of the charter holder throughout the next contract period. There is a record of past contractual noncompliance which has been reviewed. With that taken into consideration, as well as having considered the statements of the representatives of the charter holder today and the contents of the renewal portfolio which includes the academic performance, the fiscal compliance, and legal and contractual compliance of the charter holder provided to the Board for consideration of this request for charter renewal, I move to approve the request for charter renewal and grant a renewal contract to Excalibur Charter School, Inc.