Steve Sarmento

From:	Steve Sarmento
Sent:	Tuesday, November 20, 2012 4:57 PM
To:	'delitegaddie@gmail.com'
Cc:	Johanna Medina
Subject:	Application Substantively Incomplete
Attachments:	John Hancock Academy Consensus Scoring.pdf; John Hancock Academy Inc Interview Summary.pdf

Tracking:	Recipient	Delivery	Read
	'delitegaddie@gmail.com'		
	Johanna Medina	Delivered: 11/20/2012 4:57 PM	Read: 11/20/2012 5:00 PM

Arizona State Board for Charter Schools

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1616 West Adams Street, Ste. 170
Phoenix, AZ 85007
(602) 364-3080

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P.O. Box 18328
Phoenix, AZ 85009

November 20, 2012

John Hancock Academy, Inc.
Delite Gaddie, Authorized Representative
833 E. 6th Avenue
Mesa, AZ 85204

Dear Delite Gaddie,

The Technical Review Panel (TRP) has completed the substantive review of the preliminary application package submitted by John Hancock Academy, Inc. As stated in the application instructions, if it is determined that:

- ✓ No evaluation area receives a Falls Below the Expectation; and
- ✓ No more than one evaluation area in each section is scored as Approaching; and
- ✓ 95% of all evaluation areas score at the Meets level; and
- ✓ All necessary information is provided for completing a Background, Fingerprint, and Credit Check report; and
- ✓ An interview with the applicant demonstrates sufficient qualifications to operate a charter school,

the application package will then be forwarded to the Board for consideration in January 2013.

The preliminary application package for John Hancock Academy, Inc. has failed to meet the above scoring requirement(s) as evaluated by the TRP and has therefore been deemed Substantively Incomplete.
A copy of the completed scoring rubric for the preliminary application package and the results from the in-person interview are included for your review and should be considered as technical assistance in determining where improvement to the application package may be made. The applicant may request a copy of the recording of the in-person interview. Such a request must be submitted via email to Johanna Medina at johanna.medina@asbcs.az.gov by November 30, 2012. Allow ten business days for your request to be completed.

Matters related to background checks of the applicant and secured funds are being addressed under separate cover.

At this time you have the following options:

- Withdrawing your application; or
- Revising and resubmitting your application; or
- Requesting Board consideration without further revision.

These options are further detailed below.

Withdrawing the Application:

To withdraw from the application process during this cycle, you must log in to the ASBCS Online database. From the Dashboard, click on the **Submission Status** option. In the column titled "Action" click the **Withdraw** option for the application you wish to withdraw. The status of the application will then be updated to "Withdrawn." An application may not be resubmitted once it has been withdrawn.

Revising and Resubmitting:

If you choose to revise your application, you must submit a revised online application through the ASBCS Online database located at http://online.asbcs.az.gov by close of business on **December 18, 2012**. To revise an application you must login to the ASBCS Online database. From the Dashboard, click on the **Submission Status** option. In the column titled "Action" click the **Revise** option for the application you wish to revise.

- Formatting Requirements - Clearly label documents as "Revised" in the footer.
- In sections with space for only one upload, uploading the revised document will replace the previous version.
- In sections allowing the upload of more than one document, click **Remove** to delete previous versions of documents to be revised. Documents that are not removed will be carried over to the revised application package.
- Submit a summary of changes made, listed by section, to be submitted via email by **December 18, 2012** to Hugh Thompson at hugh.thompson@asbcs.az.gov. The summary must include a list of the documents that have been revised and a 1-2 sentence summary of the changes made to each section of the application.

Once all revisions have been made the revised application package may be submitted.

Consideration without Revision:

Pursuant to R7-5-203 (4) (Arizona Administrative Code), the applicant may request that the preliminary application move forward for Board consideration. Such a request must be submitted via email to Johanna Medina at johanna.medina@asbcs.az.gov by **December 18, 2012.**

The file will be closed for any preliminary application failing to meet the scoring criteria that does not contain a request for the application to move forward or has not been revised and resubmitted by December 18, 2012.

If you have any questions, please contact Hugh Thompson at 602-364-3087 or hugh.thompson@asbcs.az.gov.

Sincerely,

Johanna Medina

Johanna Medina, Director of School Quality

Part A	Education Plan				
A.1	Educational Philosophy	F	A	M	Technical Assistance/ Comments
A.1a	Provide a detailed description of the school's philosophical approach to improving pupil achievement in the target population.			1	Meets the Criteria
A.1b	Incorporate the principles or concepts fundamental to the school's proposed program of instruction.			1	Meets the Criteria
A.1c	Present a rationale for the selected approach for the target population, including research and/or experience.		1		Addresses criteria, but lacks sufficient detail in: Providing details regarding research and/or experience in relation to the target population.
A.1 Total		0	1	2	
A.2	Target Population	F	A	M	Technical Assistance/ Comments
A.2a	Identify the target population, demonstrating a clear understanding of the students and community the school intends to serve, including current levels of academic performance			1	Meets the Criteria
A.2b	Present an explanation of how the implementation of the program of instruction described in A.3 meets the needs of the target population including improving pupil achievement.		1		Addresses criteria, but lacks sufficient detail in: Providing details explaining how the school's proposed program of instruction improves pupil achievement in the target population.
A.2c	Describe the class size and teacher- student ratios and how these address the needs of the target population for improved pupil achievement.			1	Meets the Criteria
A.2 Total		0	1	2	
A.3	Program of Instruction	F	A	M	Technical Assistance/ Comments
A.3a	Describe the curriculum for the core academic content areas which aligns to the Educational Philosophy and Arizona State Standards.			1	Meets the Criteria
A.3b	Demonstrate understanding of methods of instruction central to supporting the curriculum and Educational Philosophy, including formative assessment strategies.			1	Meets the Criteria

A.3c	Describe a summative assessment plan that allows determination of student mastery of Arizona State Standards, aligned to the Educational Philosophy and methods of instruction described in the narrative.			1	Meets the Criteria
A.3d	Ensure the Program of Instruction is consistent with the Performance Management Plan.			1	Meets the Criteria
A.3 Total		0	0	4	
A.3.1	Mastery and Promotion	F	A	M	Technical Assistance/ Comments
A.3.1a	Present clear criteria for promotion from one level to the next, to include the level of proficiency that students must obtain to demonstrate mastery of academic core content.			1	Meets the Criteria
A.3.1b	Describe the process the school will use to determine grade level promotion/retention.			1	Meets the Criteria
A.3.1c	Ensure consistency with Strategy III of the Performance Management Plan.			1	Meets the Criteria
A.3.1 Total		0	0	3	
A.3.2	Course Offerings & Graduation Requirements	F	A	M	Technical Assistance/ Comments
A.3.2a	Identify graduation requirements for the school that will meet State requirements.				N/A
A.3.2b	Describe the process and criteria for awarding course credit.				N/A
A.3.2c	Ensure consistency with Strategy III of the Performance Management Plan.				N/A
A.3.2.d	Provide a menu of course offerings which include course titles and brief descriptions of classes consistent with State requirements.				N/A
A.3.2.e	Ensure consistency with the Program of Instruction and alignment with the Business Plan as presented in the application package.				N/A
A.3.2 Total		0	0	0	
A.4	School Calendar and Weekly Schedule	F	A	M	Technical Assistance/ Comments

A.4a	Demonstrate compliance with minimum requirements of number of school days per year as described in A.R.S. §15-341.01			1	Meets the Criteria
A.4b	Demonstrate compliance with hours/minutes of instruction for each grade level served as described in A.R.S. §15-901.			1	Meets the Criteria
A.4c	List daily instructional minutes dedicated to each core content area for each grade level			1	Meets the Criteria
A.4d	Provide a rationale for the weekly schedule that supports the target population.		1		Addresses criteria, but lacks sufficient detail in: Providing a rationale for the weekly schedule, in relation to the Gaddie Educational Model, that supports the target population.
A.4e	Identify professional development days consistent with the information provided in Strategy IV of the Performance Management Plans.			1	Meets the Criteria
A.4f	(If an Alternative Calendar was identified on the Target Population page) Demonstrate the various ways instructional minutes may be met.				N/A
A.4 Total		0	1	4	
A.5	Performance Management Plan	F	A	M	Technical Assistance/ Comments
A.5a	Provide a description of the basis for setting baseline figures that aligns with A.2.			1	Meets the Criteria
A.5b	Present a process, articulated for each strategy, for gathering and analyzing data on the effectiveness of the action steps.			1	Meets the Criteria
A.5c	Provide a process for updating and implementing improvements to the action steps based upon the data analysis.			1	Meets the Criteria
A.5d	Present a viable plan for managing student academic performance in Reading that includes a predicted baseline.			1	Meets the Criteria
A.5e	Present a viable plan for managing student academic performance in Mathematics that includes a predicted baseline.			1	Meets the Criteria
A.5f	Identify action steps required to achieve each of the four prescribed strategies in each plan.			1	Meets the Criteria

A.5g	Identify the timeline, responsible party, evidence of meeting action steps, and budget for accomplishing each action step.			1	Meets the Criteria
A.5h	Provide a progression of action steps from start to finish for each strategy that are sequential, timely, and use data to contribute to the school's ability to meet the identified annual target.			1	Meets the Criteria
A.5i	Create action steps within each strategy that complement and support the other strategies to the extent appropriate.			1	Meets the Criteria
A.5j	Include concrete artifacts that provide evidence of the implementation of each action step.			1	Meets the Criteria
A.5k	Provide adequate resources (e.g. time, money, personnel, etc.) to implement the action steps that support the strategies.			1	Meets the Criteria
A.5l	Budget needs identified in the Performance Management Plan are accounted for in the Budgets and discussed in the Assumptions.		1		Addresses criteria, but lacks sufficient detail in: Budget needs identified in Strategy I to IV for Math & Reading accounted for in the Budgets. Budget needs identified in Strategy I to IV for Math & Reading discussed in the Assumptions.
A.5m	Ensure consistency with the applicant's Education Plan.			1	Meets the Criteria
A.5 Total		0	1	12	
A.6.K	Curriculum Samples-Kinder Grades	F	A	M	Technical Assistance/ Comments
A.6.K.a	**Alignment to Program of Instruction** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3.			1	Meets the Criteria for Reading, Writing, and Math
A.6.K.b	**Standard Number and Description** • List the correct number and full description of the required Standard.			1	Meets the Criteria for Reading, Writing, and Math
A.6.K.c	**Instruction** • Present a summary of Instruction, by lesson, that aligns with the required Standard.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting a summary of Instruction, by lesson, that aligns with the required Standard in **Math.**

A.6.K.d	**Student Activities** • Present a summary of Student Activities, by lesson, that align with the required Standard, • Ensure Student Activities are consistent with the Instruction presented, by lesson.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting Student Activities, by lesson, that align with the required Standard in **Math.**
A.6.K.e	**Summative Assessment** • Provide a Summative Assessment clearly separate from Instruction that allows an independent student the opportunity to demonstrate mastery of the required Standard. • Provide a Summative Assessment that accurately measures student mastery of the required Standard. • Provide a Summative Assessment logically following from the sequence of Instruction and Student Activities presented. • Include a copy of the summative assessment.		1		Meets the Criteria for Reading Addresses criteria, but lacks sufficient detail in: Does not accurately measure student mastery of the required Standard in **Writing and Math.**
A.6.K.f	**Scoring Scale and Mastery Level** • List the criteria required to demonstrate mastery of the required Standard. • Describe the components to be scored and how points will be awarded. • Include an answer key or scoring rubric (whichever applicable). • Include a grading/scoring scale.		1		Meets the Criteria for Reading Addresses criteria, but lacks sufficient detail in: Including an answer key or scoring rubric for **Writing and Math.**
A.6.K.g	**Materials/Resources Needed** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3. • Include a specific list of required materials/resources that the teacher will use to facilitate the instruction, student activities, and summative assessment (omitting common consumables). • Account for materials/resources in C.5.			1	Meets the Criteria for Reading, Writing, and Math
A.6.K Total		0	4	3	

A.6.1	Curriculum Samples-1st	F	A	M	Technical Assistance/ Comments
A.6.1.a	**Alignment to Program of Instruction** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3.			1	Meets the Criteria for Reading, Writing, and Math
A.6.1.b	**Standard Number and Description** • List the correct number and full description of the required Standard.			1	Meets the Criteria for Reading, Writing, and Math
A.6.1.c	**Instruction** • Present a summary of Instruction, by lesson, that aligns with the required Standard.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting a summary of Instruction, by lesson, that aligns with the required Standard in **Math.**
A.6.1.d	**Student Activities** • Present a summary of Student Activities, by lesson, that align with the required Standard, • Ensure Student Activities are consistent with the Instruction presented, by lesson.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting Student Activities, by lesson, that align with the required Standard in **Math.**
A.6.1.e	**Summative Assessment** • Provide a Summative Assessment clearly separate from Instruction that allows an independent student the opportunity to demonstrate mastery of the required Standard. • Provide a Summative Assessment that accurately measures student mastery of the required Standard. • Provide a Summative Assessment logically following from the sequence of Instruction and Student Activities presented. • Include a copy of the summative assessment.		1		Meets the Criteria for Reading and Math Addresses criteria, but lacks sufficient detail in: Does not accurately measure student mastery of the required Standard in **Writing.**

A.6.1.f	**Scoring Scale and Mastery Level** • List the criteria required to demonstrate mastery of the required Standard. • Describe the components to be scored and how points will be awarded. • Include an answer key or scoring rubric (whichever applicable). • Include a grading/scoring scale.		1		Meets the Criteria for Reading and Math Addresses criteria, but lacks sufficient detail in: Listing criteria required to demonstrate mastery of the required Standard in **Writing.**
A.6.1.g	**Materials/Resources Needed** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3. • Include a specific list of required materials/resources that the teacher will use to facilitate the instruction, student activities, and summative assessment (omitting common consumables). • Account for materials/resources in C.5.			1	Meets the Criteria for Reading, Writing, and Math
A.6.1 Total		0	4	3	
A.6.2	Curriculum Samples-2nd	F	A	M	Technical Assistance/ Comments
A.6.2.a	**Alignment to Program of Instruction** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3.			1	Meets the Criteria for Reading, Writing, and Math
A.6.2.b	**Standard Number and Description** • List the correct number and full description of the required Standard.			1	Meets the Criteria for Reading, Writing, and Math
A.6.2.c	**Instruction** • Present a summary of Instruction, by lesson, that aligns with the required Standard.		1		Meets the Criteria for Reading Addresses criteria, but lacks sufficient detail in: Presenting a summary of Instruction, by lesson, that aligns with the required Standard in **Writing and Math.**
A.6.2.d	**Student Activities** • Present a summary of Student Activities, by lesson, that align with the required Standard, • Ensure Student Activities are consistent with the Instruction presented, by lesson.		1		Meets the Criteria for Reading Addresses criteria, but lacks sufficient detail in: Presenting Student Activities, by lesson, that align with the required Standard in **Writing and Math.**

A.6.2.e	**Summative Assessment** • Provide a Summative Assessment clearly separate from Instruction that allows an independent student the opportunity to demonstrate mastery of the required Standard. • Provide a Summative Assessment that accurately measures student mastery of the required Standard. • Provide a Summative Assessment logically following from the sequence of Instruction and Student Activities presented. • Include a copy of the summative assessment.		1		Meets the Criteria for Reading Addresses criteria, but lacks sufficient detail in: Is not clearly separate from Instruction in **Writing.** AND Does not accurately measure student mastery of the required Standard in **Math.**
A.6.2.f	**Scoring Scale and Mastery Level** • List the criteria required to demonstrate mastery of the required Standard. • Describe the components to be scored and how points will be awarded. • Include an answer key or scoring rubric (whichever applicable). • Include a grading/scoring scale.			1	Meets the Criteria for Reading, Writing, and Math
A.6.2.g	**Materials/Resources Needed** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3. • Include a specific list of required materials/resources that the teacher will use to facilitate the instruction, student activities, and summative assessment (omitting common consumables). • Account for materials/resources in C.5.			1	Meets the Criteria for Reading, Writing, and Math
A.6.2 Total		0	3	4	
A.6.3	Curriculum Samples-3rd	F	A	M	Technical Assistance/ Comments
A.6.3.a	**Alignment to Program of Instruction** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3.			1	Meets the Criteria for Reading, Writing, and Math

A.6.3.b	**Standard Number and Description** • List the correct number and full description of the required Standard.			1	Meets the Criteria for Reading, Writing, and Math
A.6.3.c	**Instruction** • Present a summary of Instruction, by lesson, that aligns with the required Standard.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting a summary of Instruction, by lesson, that aligns with the required Standard in **Math.**
A.6.3.d	**Student Activities** • Present a summary of Student Activities, by lesson, that align with the required Standard, • Ensure Student Activities are consistent with the Instruction presented, by lesson.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting Student Activities, by lesson, that align with the required Standard in **Math.**
A.6.3.e	**Summative Assessment** • Provide a Summative Assessment clearly separate from Instruction that allows an independent student the opportunity to demonstrate mastery of the required Standard. • Provide a Summative Assessment that accurately measures student mastery of the required Standard. • Provide a Summative Assessment logically following from the sequence of Instruction and Student Activities presented. • Include a copy of the summative assessment.			1	Meets the Criteria for Reading, Writing, and Math
A.6.3.f	**Scoring Scale and Mastery Level** • List the criteria required to demonstrate mastery of the required Standard. • Describe the components to be scored and how points will be awarded. • Include an answer key or scoring rubric (whichever applicable). • Include a grading/scoring scale.			1	Meets the Criteria for Reading, Writing, and Math

A.6.3.g	**Materials/Resources Needed** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3. • Include a specific list of required materials/resources that the teacher will use to facilitate the instruction, student activities, and summative assessment (omitting common consumables). • Account for materials/resources in C.5.			1	Meets the Criteria for Reading, Writing, and Math
A.6.3 Total		0	2	5	
A.6.4	Curriculum Samples-4th	F	A	M	Technical Assistance/ Comments
A.6.4.a	**Alignment to Program of Instruction** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3.			1	Meets the Criteria for Reading, Writing, Math and Science
A.6.4.b	**Standard Number and Description** • List the correct number and full description of the required Standard.			1	Meets the Criteria for Reading, Writing, Math and Science
A.6.4.c	**Instruction** • Present a summary of Instruction, by lesson, that aligns with the required Standard.		1		Meets the Criteria for Reading, Writing and Science Addresses criteria, but lacks sufficient detail in: Presenting a summary of Instruction, by lesson, that aligns with the required Standard in **Math.**
A.6.4.d	**Student Activities** • Present a summary of Student Activities, by lesson, that align with the required Standard, • Ensure Student Activities are consistent with the Instruction presented, by lesson.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting Student Activities, by lesson, that align with the required Standard in **Math** and **Science.**

A.6.4.e	**Summative Assessment** • Provide a Summative Assessment clearly separate from Instruction that allows an independent student the opportunity to demonstrate mastery of the required Standard. • Provide a Summative Assessment that accurately measures student mastery of the required Standard. • Provide a Summative Assessment logically following from the sequence of Instruction and Student Activities presented. • Include a copy of the summative assessment.		1		Meets the Criteria for Reading, Writing and Math Addresses criteria, but lacks sufficient detail in: Is not clearly separate from Instruction and does not assess an individual, unassisted student in **Science.**
A.6.4.f	**Scoring Scale and Mastery Level** • List the criteria required to demonstrate mastery of the required Standard. • Describe the components to be scored and how points will be awarded. • Include an answer key or scoring rubric (whichever applicable). • Include a grading/scoring scale.		1		Meets the Criteria for Reading and Math Addresses criteria, but lacks sufficient detail in: Listing criteria required to demonstrate mastery of the required Standard in **Writing** and **Science.**
A.6.4.g	**Materials/Resources Needed** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3. • Include a specific list of required materials/resources that the teacher will use to facilitate the instruction, student activities, and summative assessment (omitting common consumables). • Account for materials/resources in C.5.			1	Meets the Criteria for Reading, Writing, Math and Science
A.6.4 Total		0	4	3	
A.6.5	Curriculum Samples-5th	F	A	M	Technical Assistance/ Comments
A.6.5.a	**Alignment to Program of Instruction** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3.			1	Meets the Criteria for Reading, Writing, and Math

A.6.5.b	**Standard Number and Description** • List the correct number and full description of the required Standard.			1	Meets the Criteria for Reading, Writing, and Math
A.6.5.c	**Instruction** • Present a summary of Instruction, by lesson, that aligns with the required Standard.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting a summary of Instruction, by lesson, that aligns with the required Standard in **Math.**
A.6.5.d	**Student Activities** • Present a summary of Student Activities, by lesson, that align with the required Standard, • Ensure Student Activities are consistent with the Instruction presented, by lesson.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting Student Activities, by lesson, that align with the required Standard in **Math.**
A.6.5.e	**Summative Assessment** • Provide a Summative Assessment clearly separate from Instruction that allows an independent student the opportunity to demonstrate mastery of the required Standard. • Provide a Summative Assessment that accurately measures student mastery of the required Standard. • Provide a Summative Assessment logically following from the sequence of Instruction and Student Activities presented. • Include a copy of the summative assessment.			1	Meets the Criteria for Reading, Writing, and Math
A.6.5.f	**Scoring Scale and Mastery Level** • List the criteria required to demonstrate mastery of the required Standard. • Describe the components to be scored and how points will be awarded. • Include an answer key or scoring rubric (whichever applicable). • Include a grading/scoring scale.		1		Meets the Criteria for Reading and Math Addresses criteria, but lacks sufficient detail in: Listing criteria required to demonstrate mastery of the required Standard in **Writing.**

A.6.5.g	**Materials/Resources Needed** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3. • Include a specific list of required materials/resources that the teacher will use to facilitate the instruction, student activities, and summative assessment (omitting common consumables). • Account for materials/resources in C.5			1	Meets the Criteria for Reading, Writing, and Math
A.6.5 Total		0	3	4	
A.6.6	Curriculum Samples-6th	F	A	M	Technical Assistance/ Comments
A.6.6.a	**Alignment to Program of Instruction** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3.			1	Meets the Criteria for Reading, Writing, and Math
A.6.6.b	**Standard Number and Description** • List the correct number and full description of the required Standard.			1	Meets the Criteria for Reading, Writing, and Math
A.6.6.c	**Instruction** • Present a summary of Instruction, by lesson, that aligns with the required Standard.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting a summary of Instruction, by lesson, that aligns with the required Standard in **Math.**
A.6.6.d	**Student Activities** • Present a summary of Student Activities, by lesson, that align with the required Standard, • Ensure Student Activities are consistent with the Instruction presented, by lesson.		1		Meets the Criteria for Reading and Writing Addresses criteria, but lacks sufficient detail in: Presenting Student Activities, by lesson, that align with the required Standard in **Math.**

A.6.6.e	**Summative Assessment** • Provide a Summative Assessment clearly separate from Instruction that allows an independent student the opportunity to demonstrate mastery of the required Standard. • Provide a Summative Assessment that accurately measures student mastery of the required Standard. • Provide a Summative Assessment logically following from the sequence of Instruction and Student Activities presented. • Include a copy of the summative assessment.			1	Meets the Criteria for Reading, Writing, and Math
A.6.6.f	**Scoring Scale and Mastery Level** • List the criteria required to demonstrate mastery of the required Standard. • Describe the components to be scored and how points will be awarded. • Include an answer key or scoring rubric (whichever applicable). • Include a grading/scoring scale.			1	Meets the Criteria for Reading, Writing, and Math
A.6.6.g	**Materials/Resources Needed** • Ensure consistency of the Instruction, Activities, and Summative Assessment presented in the sample with the Program of Instruction described in A.3. • Include a specific list of required materials/resources that the teacher will use to facilitate the instruction, student activities, and summative assessment (omitting common consumables). • Account for materials/resources in C.5.			1	Meets the Criteria for Reading, Writing, and Math
A.6.6 Total		0	2	5	
	Part A Sub Total	0	26	54	
Part B	**Organization Plan**				
B.1	Applicant Organization	F	A	M	Technical Assistance/ Comments

B.1a	Discuss the applicant's history, including its establishment, evolution, and how operating a charter school became part of its mission.			1	Meets the Criteria
B.1b	Provide an organizational chart and describe the reporting structure within the organization consistent with the narrative.			1	Meets the Criteria
B.1c	Identify any subsidiary relationship of the applicant organization to another organization.			1	Meets the Criteria
B.1d	Identify any current or prior charter operation by the applicant, including the authorizer, timeframe, and nature of involvement.			1	Meets the Criteria
B.1e	Discuss the role of each Principal in the organization. If individuals will play a role in the operation of the school, include qualifications related to charter school operation.		1		Addresses criteria, but lacks sufficient detail in: Discussing the role of Principal Reed Gaddie in the organization. Include qualifications related to charter school operation, outside of the operation of prior charter schools for Principal Delite Gaddie regarding her role of Executive Director as described in the narrative.
B.1f	Identify any current or prior charter operation by any Principal, including the authorizer, timeframe, and nature of involvement.			1	Meets the Criteria
B.1g	Be consistent with the background information provided for each individual.			1	Meets the Criteria
B.1h	Ensure consistency with information listed on Title Page.			1	Meets the Criteria
B.1i	Ensure consistency with the contents of the application package.			1	Meets the Criteria
B.1j	Ensure consistency with legal documentation establishing entity.		1		Addresses criteria, but lacks sufficient detail in: Ensuring consistency with legal documentation establishing entity regarding Bylaws referring to K-8 school. The application package refers to a K-6 school.
B.1 Total		0	2	8	
B.2	Governing Body	F	A	M	Technical Assistance/ Comments
B.2a	Include a clear description of the responsibilities of the governing body as per ARS§15-183.E.8.			1	Meets the Criteria
B.2b	Provide a description of the composition of the governing body.			1	Meets the Criteria

B.2c	Describe the process for filling vacancies on the school governing body.			1	Meets the Criteria
B.2d	Be consistent with B.1.			1	Meets the Criteria
B.2e	Be consistent with all sections of the application package.			1	Meets the Criteria
B.2 Total		0	0	5	
B.3	Management and Operation	F	A	M	Technical Assistance/ Comments
B.3a	Provide a clear delineation of the roles and responsibilities for administering the day-to-day activities of the school.		1		Addresses criteria, but lacks sufficient detail in: Providing detail of the business manager's duties if contracting out for financial services.
B.3b	Present an operational plan that includes oversight responsibilities related to instruction and operational services. Plan must identify the number of administrative personnel (each year for the first three years) and their oversight responsibilities related to the following areas: i. Instruction, ii. Curriculum and Assessment (mandated State testing), iii. Staff Development, iv. Financial Management, v. Contracted Services, vi. Personnel, vii. Grants Management, and viii. Student Accountability Information System (SAIS).			1	Meets the Criteria
B.3c	Identify critical skills or experience that will indicate sufficient qualification for fulfillment of those responsibilities.		1		Addresses criteria, but lacks sufficient detail in: Identifying critical skills or experience that will indicate sufficient qualification for fulfillment of responsibilities related to SAIS.
B.3d	Be consistent with all sections of the application package.			1	Meets the Criteria
B.3 Total		0	2	2	
B.3.1	Education Service Providers	F	A	M	Technical Assistance/ Comments

B.3.1a	Provide an explanation for the reasons for contracting with or having a governance relationship with an ESP, in general, and this provider in particular, and how the ESP will further the school's mission and program.				N/A
B.3.1b	Provide a clear description of the services to be provided by the ESP.				N/A
B.3.1c	Describe the applicant's performance expectations for the ESP and how the applicant will evaluate that performance.				N/A
B.3.1d	Describe the ESP's roles and responsibilities in relation to the applicant.				N/A
B.3.1e	Ensure ESP-related costs are described in the Budget Narrative and included in the Start-Up and Three-Year Operational Budget as appropriate.				N/A
B.3.1 Total		0	0	0	
B.3.2	Contracted Services	F	A	M	Technical Assistance/ Comments
B.3.2a	Delineate all areas, if any, which may require the applicant to seek outside expertise.		1		Addresses criteria, but lacks sufficient detail in: Delineating all areas which may require the applicant to seek outside expertise, specifically janitorial.
B.3.2b	Discuss the professional qualifications expected of those to be retained to perform each listed contracted service.		1		Addresses criteria, but lacks sufficient detail in: Discussing the professional qualifications expected of those to be retained to perform accounting, financial consulting, independent audit services, and special education services.
B.3.2c	Identify the costs associated with each listed contracted service.		1		Addresses criteria, but lacks sufficient detail in: Identifying the costs associated with accounting, financial consulting, independent audit services, janitorial services, and special education services.
B.3.2d	Provide sources for costs of each listed contracted services.		1		Addresses criteria, but lacks sufficient detail in: Providing sources for costs of janitorial services.
B.3.2e	Ensure costs are described in the Budget Narrative and included in the Start-Up and Three-Year Operational Budget as appropriate.		1		Addresses criteria, but lacks sufficient detail in: Ensuring costs are described in the Budget Assumptions.
B.3.2 Total		0	5	0	
	Part B Sub-Total	0	9	15	
Part C	**Business Plan**				
C.1	Facilities Acquisition	F	A	M	Technical Assistance/ Comments

C.1a	Identify and describe the facility necessary to implement the program. Include square footage, number of classrooms, layout of space, and location that will accommodate the number of anticipated students as identified throughout the application package.			1	Meets the Criteria
C.1b	Identify and provide documentation on available facilities within the target market that will allow implementation of the program of instruction and support the student population and class size described in the application package. Or Provide details of already acquired facility, purchased land or proposed build that will allow implementation of the program of instruction and support the student population and class size described in the application package.		1		Addresses criteria, but lacks sufficient detail in: Providing documentation on specific available facilities/land within the target market that will support the student population and class size described in the application package.
C.1c	Identify a timeframe for securing an appropriate facility consistent with the start-up of the school.			1	Meets the Criteria
C.1d	Identify costs associated with securing the facility and ensuring compliance with all applicable laws and regulations including obtaining educational occupancy.		1		Addresses criteria, but lacks sufficient detail in: Identifying costs associated with $3.7 million of the school facility development.
C.1e	Describe any financial arrangements that have been made for securing the facility.		1		Addresses criteria, but lacks sufficient detail in: Describing financial arrangements that have been made for securing the facility regarding acquisition of property and construction, including modulars in Year 2.
C.1f	Ensure the Layout of Space is consistent with the narrative.			1	Meets the Criteria
C.1g	Ensure costs as described in the narrative accounted for in the Start-Up and Three-Year Operational Budgets.			1	Meets the Criteria
C.1h	Be consistent with all sections of the application package.			1	Meets the Criteria
C.1 Total		0	3	5	
C.2	Advertising and Promotion	F	A	M	Technical Assistance/ Comments

C.2a	Provide a clear description of an advertising/promotion plan that appears viable and adequate to support the number of students included in the Three-Year Operational Budget.			1	Meets the Criteria
C.2b	List costs associated with the plan described in the narrative.			1	Meets the Criteria
C.2c	Identify how advertising/promotion costs were determined.			1	Meets the Criteria
C.2d	Identify a timeframe for advertising/promotion consistent with the start-up of the school.			1	Meets the Criteria
C.2e	Describe the proposed fair and equitable enrollment procedures, including the timeframe, waitlist, lottery, and the like, and documents to be included in the enrollment packet.			1	Meets the Criteria
C.2f	Ensure costs as described in the narrative accounted for in the Start-Up and Three-Year Operational Budgets.			1	Meets the Criteria
C.2 Total		0	0	6	
C.3	Personnel	F	A	M	Technical Assistance/ Comments
C.3a	Provide a staffing plan that appears viable and adequate for the effective implementation of the program of instruction and operation of the charter school as described, to include the grades and number of students to be served in each of the first three years of operation, and the number of each type of instructional and non-instructional personnel each year.		1		Addresses criteria, but lacks sufficient detail in: Providing a staffing plan that appears viable and adequate for the effective implementation of the program of instruction regarding the qualifications of teachers.
C.3b	Provide a detailed plan to recruit, hire, and train instructional staff consistent with the start-up of the school.			1	Meets the Criteria
C.3c	Ensure all salaries and Employee Related Expenses (ERE) described in the narrative are accounted for in the Start-Up and Three-Year Operational Budgets.		1		Addresses criteria, but lacks sufficient detail in: Describing costs in the narrative for items included in the Start-Up and Three Year Operational Budgets regarding health insurance costs, retirement, and teacher salaries.
C.3 Total		0	2	1	
C.4	Start-Up Budget	F	A	M	Technical Assistance/ Comments

C.4a	List only sources of start-up revenue fully supported by Verifiable Proof of Secured Funds documentation.			1	Meets the Criteria
C.4b	List expenditures to cover the start-up plans described in the application package.			1	Meets the Criteria
C.4c	Demonstrate through the assumptions that the amounts listed are viable and adequate.		1		Addresses criteria, but lacks sufficient detail in: Demonstrating through the assumptions that the amounts listed for all start-up costs are viable and adequate.
C.4d	Ensure revenues cover expenditures.			1	Meets the Criteria
C.4e	Ensure that timeframes described in all sections of the application package are consistent with timeframes listed on the Start-Up Budget.		1		Addresses criteria, but lacks sufficient detail in: Timeframes described in section C.1 Facilities Acquisition of the application package are not consistent with timeframes and costs listed on the Start-Up Budget.
C.4f	Be consistent with all sections of the application package.			1	Meets the Criteria
C.4 Total		0	2	4	
C.5	Three Year Operational Budget	F	A	M	Technical Assistance/ Comments
C.5a	List expenditures to cover the Education Plan, Organization Plan, and Business Plan described in the application package.			1	Meets the Criteria
C.5b	Ensure state equalization detailed in Revenue Worksheets is consistent with the Target Population and the student count by grade level.			1	Meets the Criteria
C.5c	Demonstrate through the assumptions that the amounts listed are viable and adequate.		1		Addresses criteria, but lacks sufficient detail in: Demonstrating through the assumptions that the amounts listed for employee related expenses are viable and adequate.
C.5d	Ensure revenues cover expenditures.			1	Meets the Criteria
C.5e	Be consistent with all sections of the application package.		1		Addresses criteria, but lacks sufficient detail in: Ensuring consistency between C.3 Personnel and salaries in Three Year Operational Budget., Ensuring consistency between O&M contract services costs in Three Year Operational Budget and Three Year Operational Budget narrative.
C.5 Total		0	2	3	
	Part C Sub-Total	0	9	19	
Grand Total	**Part A, B, and C**	0	44	88	
SUMMARY	No scoring area in Part A, B, or C received a score of Falls Below				
	More than one scoring area in each section scored Approaches				
	Fails 95% Test				
CONCLUSION	**Fails to Meet the Criteria, Therefore Substantively Incomplete**				

The Technical Review Panel (TRP) conducted an interview of the applicant, John Hancock Academy, Inc. (JHA) on October 31, 2012 for the following purposes:

- To evaluate the capacity of the applicant to successfully implement the plan to operate a high-quality charter school,
- To provide the applicant team the opportunity to demonstrate how well they understand and have thought through the plan presented in the written application.

The applicant team present for the interview included the following members of the corporate board: Delite Gaddie and Reed Gaddie.

The interview questions posed by the interview panel addressed the Education Plan, Organization Plan, and Business Plan. The results of the in-person interview are divided into sections aligned to scoring areas of the application. Each row begins with an overall rating for that portion of the interview. The rating options for each section are:

- The applicant provided additional information that improved the TRP's overall evaluation of the applicant.
- The information provided by the applicant did not change the TRP's overall evaluation of the applicant.
- The information provided by the applicant raised additional questions and/or concerns in the TRP's overall evaluation of the applicant.

The last column provides a summary of the responses given by the applicant in italics, and includes the primary questions asked by TRP members.

Score	Section/Criteria	Summary
The information provided by the applicant did not change the TRP's overall evaluation of the applicant.	Ed Plan All	1. Describe a typical day in the life of a 3rd grade student at your school. • What does the Gaddie Educational Model look like through the course of the day that you have described? *JHA described a typical day. The description did not include aspects of what the Gaddie Educational Model looked like through the course of the day.*
The information provided by the applicant did not change the TRP's overall evaluation of the applicant.	A.3 Program of Instruction	2. In your program of instruction you describe the Gaddie Educational Model. Tell us more about the rationale for selecting the Gaddie Educational Model to address the needs of the target population. *JHA provided a description of the Gaddie Educational Model. The description did not include reasons for choosing the Gaddie Educational Model to meet the needs of the target population.*

Score	Section/Criteria	Summary
The information provided by the applicant did not change the TRP's overall evaluation of the applicant.	A.4 Weekly Schedule and Calendar	3. Describe the reasons for selecting a rolling schedule *JHA described the daily schedule. JHA did not provide a rationale for selecting a rolling daily schedule of classes to meet the needs of the target population.*
The information provided by the applicant did not change the TRP's overall evaluation of the applicant.	A.5 PMP/ B.3 Management and Operation	4. Describe the day to day routines of the principal and assistant principal. • Describe how the action steps outlined in the PMP will be integrated into that schedule. *JHA did not provide any new information regarding the day to day routines of the principal and assistant principal that aligned with the scoring criteria for section A.5 and B.3.*
The information provided by the applicant raised additional questions and/or concerns in the TRP's overall evaluation of the applicant.	A.5/C.5	5. The PMP does not list specific costs for action steps, but states that costs are "In Budget". • Strategy 1 step 4 of the PMP indicates that after-school tutoring will be available. Where in the budget are the costs associated with after-school tutoring accounted for? • Strategy 3 step 6 of the PMP states that quarterly benchmark assessments will be administered. Where in the budget are the costs associated with the benchmark assessments? • Do teacher receive any additional pay above the salary accounted for in the budget for providing tutoring to students? *JHA stated that the costs for after-school tutoring were accounted for in the instructional consumables line item. JHA also stated that those costs for benchmark assessments were also accounted for in the instructional consumables line item. JHA stated that teachers get paid for what they do.*

Score	Section/Criteria	Summary
The information provided by the applicant raised additional questions and/or concerns in the TRP's overall evaluation of the applicant.	A.6	6. Reviewers noted that several of the curriculum samples contained instruction and/or assessments that did not align to the Arizona Common Core Standards. Describe the process for aligning the Gaddie Educational model and curriculum resources to the Arizona Academic Standards. *JHA stated that they were aware that the templates were not aligned to the Common Core Standards and that they were in the process of revising the templates. JHA stated that the templates were completed before Mr. Gaddie had received training on the Common Core Standards. JHA stated that most of the templates were obtained from a committee of teachers from Happy Valley School.*
The information provided by the applicant raised additional questions and/or concerns in the TRP's overall evaluation of the applicant.	A.6 Curriculum Samples	7. What components will your administrators be looking for to identify an effective lesson plan aligned Arizona Common Core Standards? • Would you identify those elements in the 4th grade Math curriculum sample? • In the 4th grade Math sample, can you indicate how the assessment items are aligned to the indicated standard? *JHA stated that the curriculum samples were not aligned to the standard. JHA did not identify specific examples in the 4th grade Math curriculum sample. JHA stated that the assessment was not aligned to the standard.*

Score	Section/Criteria	Summary
The applicant provided additional information that improved the TRP's overall evaluation of the applicant.	B.3.2 Contracted Services	8. Several areas were identified for contracted services. What specific skills, experience are you looking for in a quality service provider for financial and audit services? • What specific skills, experience are you looking for in a quality service provider for special education? *JHA described the skills and experience sought in quality service providers for financial and audit services. JHA also described the skills and experience sought in quality service providers for special education services.* The applicant provided information in the interview which should be incorporated in the narrative.
The information provided by the applicant raised additional questions and/or concerns in the TRP's overall evaluation of the applicant.	B.3.2Contracted Services	9. Describe the process for determining costs for contracted services. • You state in the narrative that costs are based on the experience of the sister schools. How are these costs adequate and viable for this new school location? *JHA described how the costs for contracted services were calculated. JHA stated that costs for contracted services were based on an average of what other schools spend as a percentage of their budget.*
The information provided by the applicant raised additional questions and/or concerns in the TRP's overall evaluation of the applicant.		10. Delite and Reed Gaddie were asked to clarify their involvement with other charters schools and in what capacity. *Mrs. Gaddie provided a summary of her relationship with several charter schools in Arizona including the sale of property to Sequoia, and serving on the board of other schools operated by other members of her family. Mr. Gaddie read from a list detailing a responsibilities and oversight he had in projects at several charter schools. He was asked to clarify if he served as the school director at any of the schools. He responded that he was the school director of Arizona Career and Technology (ACT). Mr. Gaddie was then asked to provide background regarding the reasons that school was no longer in operation.*

Score	Section/Criteria	Summary
The information provided by the applicant raised additional questions and/or concerns in the TRP's overall evaluation of the applicant.	C.2 Advertising and Promotion	11. The application describes the target population as having access to numerous high achieving schools with low student/teacher ratios in the area. Why do you believe that the marketing plan you've described will attract the enrollment you predict from your target population. • What does the Gaddie Educational Model provide for the target population that is not currently available from other educational choices in the target area? *JHA stated that the projected enrollment number is realistic based on the historical trend of Sequoia, Noah Webster, ACT, and Happy Valley opening with 600 students. JHA also stated that the community in the area has expressed interest in having a school with the Gaddie Educational Model. JHA stated that the test scores at Happy Valley demonstrate that the Gaddie Educational Model results in academic achievement. JHA did not describe what the Gaddie Educational Model provides to the target population that is not available from other educational choices in the area.*
The information provided by the applicant raised additional questions and/or concerns in the TRP's overall evaluation of the applicant.	C.1 Facilities Acquisition	12. The narrative states that $3.7 million will be used in facility development. Describe the facility, location, and other materials that will be purchased with the $3.7 million. • The narrative stated that you were in discussion with several different parties regarding bond financing. What progress has been made in securing financing since the application was submitted? *JHA stated that the location identified in the application may not be available as it will soon be going into escrow. JHA stated that this will require them to find other possible site locations. JHA clarified that the funds will be used to build a high quality, brand new facility comparable to any district facility.*
The information provided by the applicant did not change the TRP's overall evaluation of the applicant.	C.1 Facilities Acquisition	13. In year two, why are you planning on adding a 6-classroom modular unit to a newly constructed facility? • Why do the facilities plans not account for the expected growth in their design? *JHA stated that the proposed addition of 6 classroom modular units was not the preferred method of handling growth, but was a result of restrictions based on the facility location. JHA stated that they may consider dual scheduling as a method of handling growth rather than adding the modular classrooms.*