

## AGENDA ITEM EXECUTIVE SUMMARY: Application for New Charter

### Request

Somerset Academy Arizona, Inc. (“Applicant”) submitted a new charter application package on May 25, 2018. The Technical Review Panel (“TRP”) evaluated the application package and determined that the revised application package does not meet the minimum scoring requirements set by the Board for the 2019-2020 application cycle. Somerset Academy Arizona, Inc. has requested that the revised application package not meeting the scoring criteria move forward for Board consideration. The Applicant also attended a capacity interview conducted by the TRP. Upon consideration of the application package and results of the capacity interview, the TRP recommends that the revised application package for the Applicant be approved.

### Applicant Summary

Proposed School Name	Target Start Date	School Location	Grade Levels	School Calendar
Somerset Academy of Arizona	July 22, 2019	Goodyear	K-8	180 days

### Mission Statement

The mission of Somerset Academy of Arizona is to maximize student achievement and foster the development of responsible, self-directed life-long learners in a safe and enriching learning environment; correlating with the vision to provide an equitable, high-quality education for all students.

### Target Population

*The following summary was excerpted from the Applicant’s Educational Plan A.2: Target Population narrative.*

The Applicant plans to serve students in the city of Goodyear, Arizona, which has an expected population increase of 14% over the next four years. The Applicant indicates that “71% of the student population identifies as races other than White, 8% are considered English Language Learners, 11% are identified as Special Needs, and 50% qualify for the Free and Reduced Lunch Program.” The applicant states that “based on 2015 AzMERIT results, only 23.1% of the students in the target population are proficient in English language arts (ELA), while only 19.8% are proficient in mathematics and 39.6% are proficient in science.”

### Three Year Plan

	FY 2020	FY 2021	FY 2022
<b>Grade Levels</b>	K-3	K-4	K-5
<b>Enrollment</b>	325	425	525

Proposed Location (see Business Plan C.1: Facilities Acquisition):

Unconfirmed location:

- Skyway Church of the West Valley, 14900 West Van Buren Street, Goodyear

### Program of Instruction

*This summary is based on information submitted for the Applicant’s Educational Plan A.1: Educational Philosophy and A.3: Program of Instruction narratives.*

“Somerset Academy of Arizona (SOMAZ) is a college preparatory school with an emphasis on cultivating effective leaders, developing good character, and instilling in each child a desire to render service.” The Applicant states that “the educational philosophy at SOMAZ is anchored by the key areas of collaboration, communication, creativity and critical thinking.” According to the Applicant, students will receive instruction in research-based strategies that are shown to be especially effective with those that are at-risk and ELL. These may include University of Kansas’ Strategic Instruction Model and CORE Reading with Explicit Phonics, and CORE Math. The school’s educational program will also include data-driven differentiated instruction, a thematic approach to integrate core areas of study, a focus on creativity and critical thinking, and 21<sup>st</sup> century skills. Students will experience technology-rich classrooms” staffed with certified master teachers qualified in their field”.

Corporate and School Governing Body Members	Type
Ana Diaz	Charter Organization
Todd German	Charter Organization
Lourdes Isla Marrero	Charter Organization
Tony Morales	Charter Organization
Taylor Smith	Charter Organization

See Charter Principal Resumes in Appendix B.

## TRP Recommendation and Scoring

The TRP assessed the application package against the evaluation criteria published in the New Charter Application Instructions. Approval is based on either receiving 95% or higher for each plan (Educational, Operational, and Business) and/or through showing capacity throughout the interview process. The following is a summary of the evaluation information in support of the recommendation by the TRP based on the revised application package and the capacity interview.

### Overall Scoring Results

	Preliminary TRP Scores	Revised TRP Scores
Any Falls Below the Expectations ratings?	Yes	No
Any section in which more than one evaluation area scored Approaches?	Yes	No

	Preliminary TRP Scores		Revised TRP Scores	
	Yes	Percent Meets	No	Percent Meets
Educational Plan Score ≥ 95% Meet standard?	No	89%	Yes	98%
Operational Plan Score ≥ 95% Meet standard?	No	79%	Yes	100%
Business Plan Score ≥ 95% Meet standard?	No	84%	No	94%

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

### TRP Recommendation

Based on the Applicant’s application package and the in-person capacity interview, the TRP recommends that the revised application package be approved. A full explanation of the TRP’s recommendation is provided in Appendix A. Recommendation Report

## Applicant Background Summary

Additional data is provided in relation to the Applicant’s principals’ experience and qualifications, as an indicator of the Applicant’s ability to implement a charter or operate a charter school.

### Principal Name: Tony Morales

#### Current Affiliation(s):

- 3 years as a Director at N2 Growth (King of Prussia, PA)
- 2 years as Treasurer and Director for the Board of Directors of Somerset Academy Foundation, Inc.

#### Past Affiliation(s) of Note:

- 1 year as a Management Consultant at The ACE Foundation (Miami, FL)
- 1 year as Director of Strategy and Analytics and 2 years as Director of Compliance and Governmental Affairs with Academica (Miami, FL)



**Principal Name: Lourdes Isla Marrero**

Current Affiliation(s): 12 years Principal at Mater Gardens Academy Charter School (Miami, FL)

Past Affiliation(s) of Note:

- 3 years as a Teacher and 4 years as Assistant Principal with Mater East Academy (Miami, FL)

**Principal Name: Todd German**

Current Affiliation(s): 5 years as Partner with Keys Wealth Management (Key West, FL)

Past Affiliation(s) of Note:

- 7 years as a Vice President at Centennial Bank (Key West, FL)
- 5 years as an Assistant Vice President of Keys Federal Credit Union (Key West, FL)

**Principal Name: Taylor Smith**

Current Affiliation(s): 9 years as President at Project Finance and Development (Jacksonville, FL)

Past Affiliation(s) of Note:

- Served on Florida’s founding Charter School Review Panel

**Principal Name: Ana Diaz**

Current Affiliation(s): 4 years as Elementary School Principal at Pinecrest Preparatory Academy Charter School (Miami, FL)

Past Affiliation(s) of Note:

- 9 years as Assistant Principal at Pinecrest Academy South Campus Charter School (Miami, FL)

**Education Service Provider Background Information**

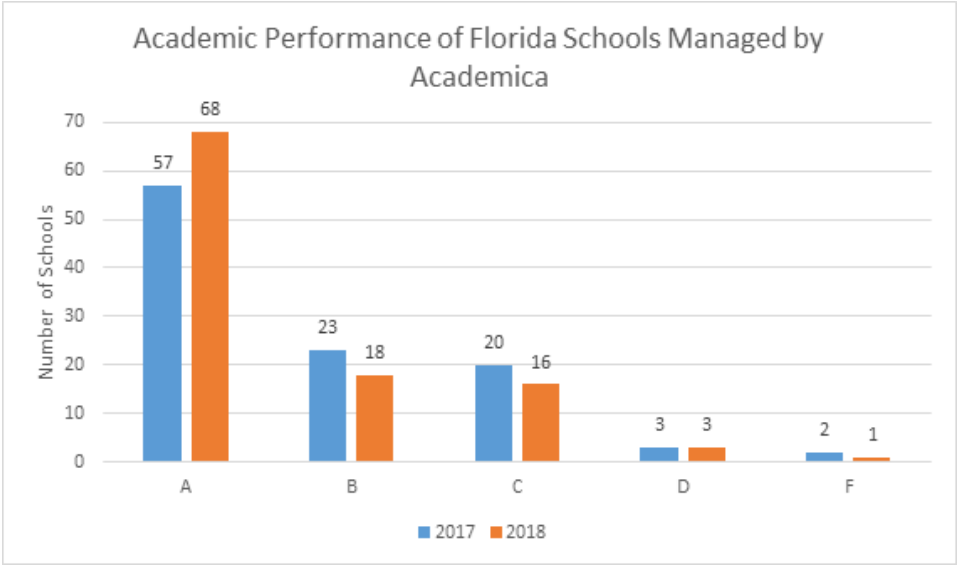
*This summary is based on information submitted for the Applicant’s Operational Plan B.3.1: Education Service Providers. Additionally, as part of the due diligence process, staff reviewed the academic performance of the ESP the Applicant intends to contract with.*

The Applicant team is comprised of individuals from Somerset Academy, Inc., a non-profit charter school management organization (“CMO”). Additionally, the Applicant will be contracting with the ESP, Academica. According to the Applicant, “although it is not common for a CMO to contract with an ESP, Somerset Academy Inc. has found that this model works well. Somerset Academy Inc. schools have contracted with Academica for over a decade.” Academica will not manage day-to-day operations of the school, but rather, will provide back office support and independent accountability for the school’s board. These services will include financial services, human resources, public relations and marketing, board facilitation, professional development, acting as a government liaison, assistance with facilities, strategic planning and implementation, as well as accountability.

**Academic Performance**

A chart summarizing the academic performance data for the schools managed by Academica, according to the Florida Department of Education, is below.





More detailed information regarding specific school performance can be found in Appendix C.

