



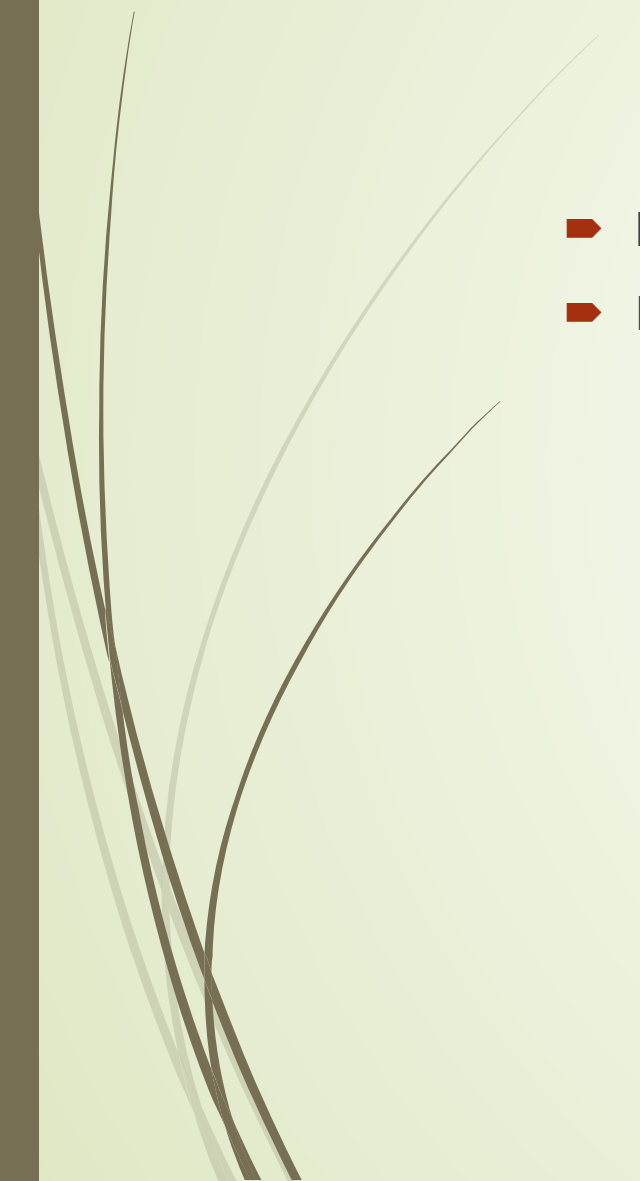
# New Charter Application Workshop

March 16, 2017





# Welcome

- Introductions
  - Housekeeping Items
- 



# Purpose



- ▶ To give a clear understanding of how to fill out the application.
- ▶ To answer questions you may have about the application or process.
- ▶ To assist you in understanding the timeframes and processes involved in the New Charter Application Process.



# Application Overview



# Objectives



- ▶ To provide an understanding of the initial forms found in the Application Wizard.
- ▶ To help you understand the importance of clearly portraying the first three years of operation.
- ▶ To give you an understanding of the sequence and format of the application.

# Cover Page

- Instructions and Help Files at the top of each page.
- Application Agreement Information needs to be signed by Authorized Representative.
- Enter password to sign.

**New Application**

**Instructions**

Help files

- > Cover Page Instructions— Click Here to Download Instructions
- > Application Overview— Click Here to Download Application Overview
- > Terms To Know— Click Here to Download Instructions

**Cover Page**

**Application Agreement Information**

I certify all information contained in this application package is complete and accurate, realizing that any misrepresentation could result in disqualification from the charter application process or revocation after award. I understand that incomplete application packages will not be considered.

The Applicant acknowledges that all information presented in the application package, if approved, becomes part of the charter and will be used for accountability purposes throughout the term of the charter.

The Applicant acknowledges that the principals have read all Arizona statutes regarding charter schools and that, if approved to operate a charter school, the Applicant is subject to and will ensure compliance with all relevant federal, state and local laws and requirements.

The Applicant acknowledges that if approved to operate a charter school, the Applicant must execute a charter contract with the Arizona State Board for Charter Schools ("Board") within twelve months after the Board decides to grant the charter. If a charter is not timely signed, the Board's decision to grant the new charter expires.

The Applicant acknowledges that if approved to operate a charter school, the Applicant must begin providing educational instruction no later than the second fiscal year after the Board's decision to grant the charter. Failure to begin providing educational instruction accordingly may result in the revocation of the charter.

The Applicant acknowledges that if approved to operate a charter school, the Applicant must provide the number of days of instruction as approved in the application within the State's fiscal year that begins July 1st and ends June 30th. Failure to do so may result in revocation of the charter.

Application Agreement Signature\*

Enter password of authorized representative to sign form:

Password:

**Table of Contents**

- < Cover Page
- > Title Page
- > Target Population
- > A. Educational Plan
- > B. Operational Plan
- > C. Business Plan
- > Additional Information

You may use this table of contents to switch to a different section of the application.

This will save your progress on this page before switching.

# Title Page: Upper Half

- ▶ Enter name of entity applying for charter.
- ▶ Applicant Name and Charter School Name fields might be pre-populated.
- ▶ Click link to add Authorized Representative.
- ▶ Enter contact information for official communication.
- ▶ Select the Form of Organization consistent with documents establishing legal entity.

**Title Page**

**Applicant Name\***   
This may be a public body, private person or private organization. Only use an individual's name if that is the case. Do not use "Proprietorship".

**Charter School Name\***

**Authorized Representative\***  
[Add Authorized Representative](#)

**Authorized Representative Mailing Address\***

Address Line 1\*

Address Line 2

City\*

State\*

Zip\*

County\*

Day Time Phone\*

Fax

**Form of Organization\***

Non Profit Corporation  Government Entity  
 For Profit Corporation  Tribal Entity  
 Partnership  
 Sole Proprietor

# Title Page: Lower Half

- Declare if you will contract with or have a governance relationship with an ESP.
- Click link to add each Principal.
- Identify Type and Name or Number of the makeup of your School Governing Body, per A.R.S. §15-183 (E)(8).

Education Service Provider (ESP)\*

EMO

CMO

None. We do not intend to contract with or have a governance relationship with an education service provider.

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Principal Background Information

Charter Principals\*

[Add Officer, Director, Member or Partner](#)

---

School Governing Body

Type:  Name/Number:

Enter the type and name of each governing body member. If you don't know the names of your governing body members, use the name field to indicate the number of each type of member.

---



# Adding Authorized Representatives and Principals

- ▶ Authorized Representative- An individual with the power to bind an applicant contractually according to the applicant's Articles of Incorporation, operating agreement, or by-laws.
- ▶ Principal- Any officer director, partner, or member of the corporate board of the entity applying for a charter at the time of the submission package.

**Add Authorized Representative** ✕

Last 4 Digits of SSN  Date of Birth (mm/dd/yyyy)

**Add Officer, Director, Member or Partner** ✕

Last 4 Digits of SSN  Date of Birth (mm/dd/yyyy)

# Adding Authorized Representatives and Principals

### Add Authorized Representative ✕

Last 4 Digits of SSN  Date of Birth (mm/dd/yyyy)

It looks like that individual isn't in our system, so we'll need some additional information. If you believe this to be in error, you may re-enter the above information by clicking "skip this member" below.

First Name  Last Name

Email Address

Fingerprint Clearance Card

Affidavit

[Download empty template](#)

Background Information Sheet

Resume

[Download empty template](#)

Verification of Coursework/Degree

[Download directions](#)

# Target Population Page

- ▶ Provide a statement describing the mission of the proposed school.
- ▶ Check all the grades that will be taught at your school.
- ▶ Enter the total number of students that will be served in all grades.
- ▶ Select a Standard or Extended School Year calendar.
- ▶ Enter the actual number of days of instruction.
- ▶ Enter the proposed first day of school.

### Target Population

**Mission Statement\***

---

**Grades Served\***  K  4th  8th  12th  
Please check all grades being taught.  1st  5th  9th  
 2nd  6th  10th  
 3rd  7th  11th

---

**Enrollment Cap\***

---

**School Calendar\***  Standard  Extended School Year

---

**Instructional Days\***

---

**Target Start Date\***



# Application Structure

- ▶ The application is divided into three main parts:
  - ▶ Educational Plan: Includes details regarding educational climate, structure, assessment, and outcomes.
  - ▶ Operational Plan: Includes details about the entity that will be contracting with ASBCS to hold a charter.
  - ▶ Business Plan: Includes details about operating a viable enterprise.

# Understanding the Application

## Educational Plan

### A.3.2 Course Offerings and Graduation Requirements

#### Requirements

(6 page maximum)

#### Applicant Instructions

Select the statement that is applicable and proceed as directed:

- This Applicant will serve any grade 9 or above. *Complete this section.*
- This Applicant will not serve any grade above 8. *Skip this section.*

Provide a clear and comprehensive plan for awarding course credit for students of the school. Include clear criteria and conditions that guide how course credit is awarded and how it demonstrates the student's capacity to pass the end of course State assessments.

Describe the school's course offerings and graduation requirements.

#### Required Exhibit

- Menu of course offerings

#### Evaluation Criteria

A response that meets the standard will:

- a) Identify graduation requirements for the school that will meet State requirements.
- b) Describe a comprehensive viable and adequate process that includes clear and criteria and conditions for awarding course credit.
- c) Provide a rationale for the selected criteria and conditions for awarding course credit and how it demonstrates the student's capacity to pass the end of course State assessments.
- d) Provide a menu of course offerings which include course titles and brief descriptions of classes consistent with State requirements and clearly demonstrating alignment to the Program of Instruction.
- e) Ensure consistency with the Program of Instruction and alignment with the Business Plan as presented in the application package.

- **Page Limit**—applies to some sections
- **Applicability Guidelines**—identifies whether a section is not required for all applicants
- **Applicant Instructions**—provides an overview of what the narrative should contain
- **Required Exhibits**— additional documents beyond the required narrative
- **Evaluation Criteria**—explains how the submission will be evaluated



# The Educational Plan



# Objectives

You will gain an understanding of:

- ▶ How to identify the components of the Educational Plan section of the Application
- ▶ How to be clear and concise in narrative sections A.1 through A.4
- ▶ How to develop responses that meet evaluation criteria




# A. Educational Plan

- ▶ In the Educational Plan, you will define what students will achieve, how they will achieve it, and how the school will evaluate performance.
- ▶ You will provide a clear picture of what a student who attends the school will experience with respect to educational climate, structure, assessment, and outcomes.
- ▶ It contains 8 sections
  - ▶ Section A.3.1 is required if the charter will cover any grade K to 8.
  - ▶ Section A.3.2 is required if the charter will cover any grade 9 to 12.



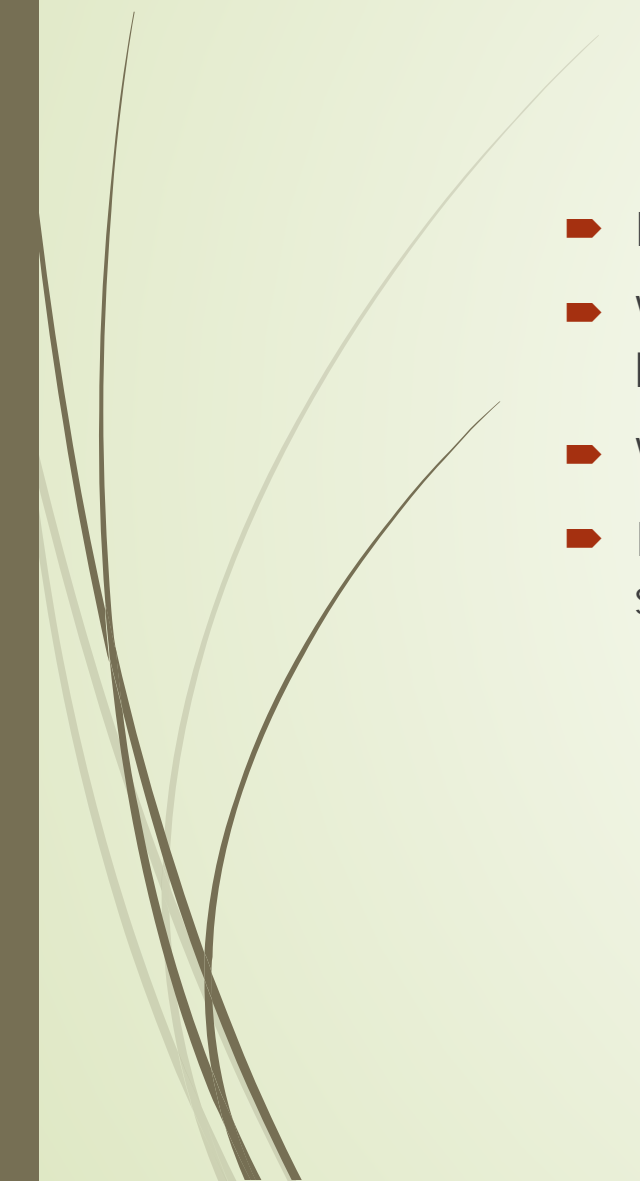


# A.1 Educational Philosophy

- ▶ Provide an overview of the core educational beliefs that provide the foundation for the school.
  - ▶ Present a rationale, including research or experience, supporting your decision to use this approach with your target population
- 



# A.1 Guiding Questions

- ▶ How will students learn at your proposed school?
  - ▶ What instructional methodology will your staff utilize to allow students to learn?
  - ▶ Why did you select this approach?
  - ▶ Does research and experience indicate that this approach will be successful?
- 



## A.2 Target Population

- ▶ Demonstrate your understanding of the students and community you intend to serve
- ▶ Include class size and teacher-student ratios
  - ▶ Explain how these will align with the program of instruction
  - ▶ Explain how these will improve pupil achievement



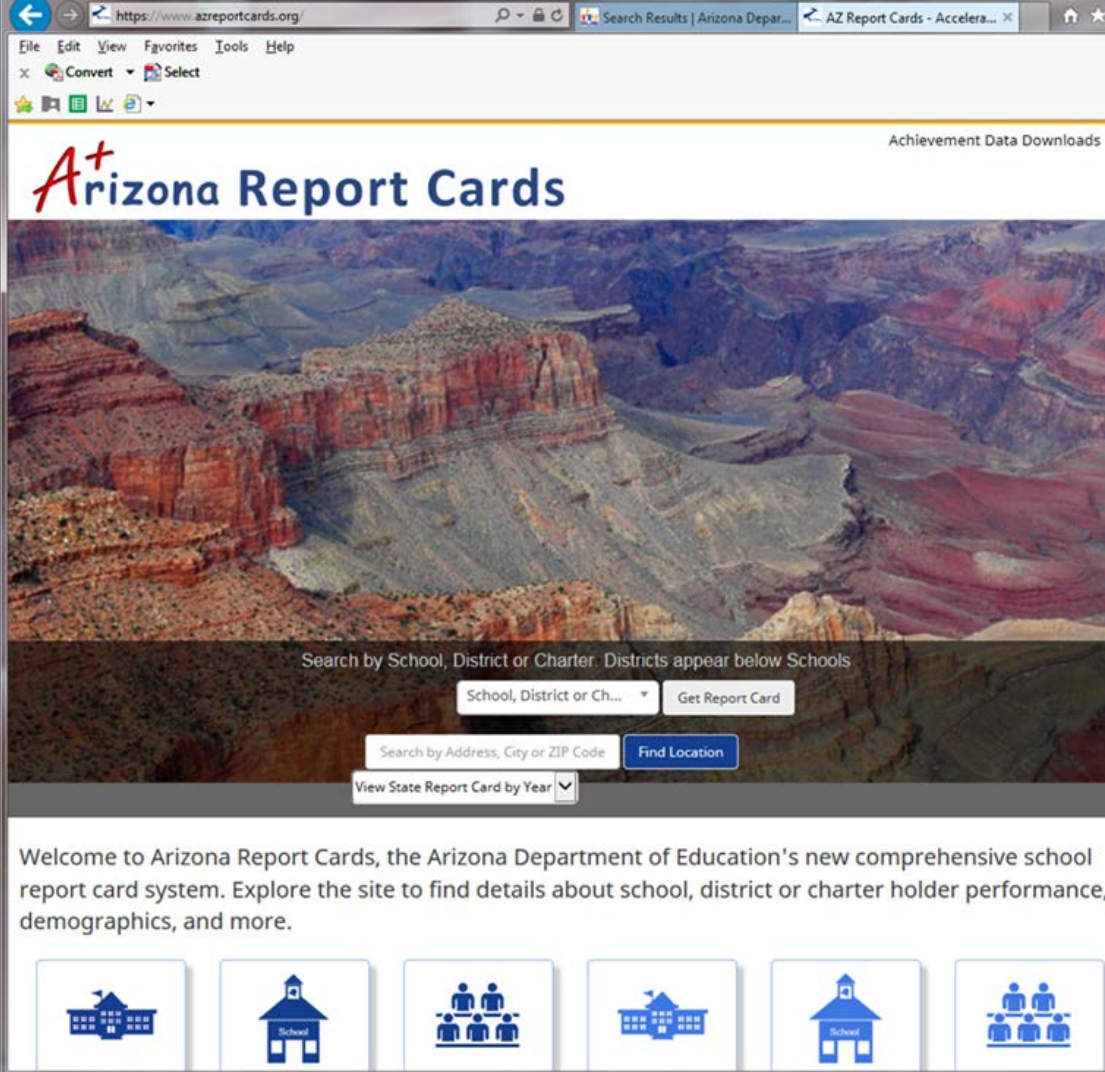
## A.2 Guiding Questions

- ▶ Is your target population based on a specific location, a specific type of student, or both?
- ▶ Where will you be located?
- ▶ Who will you be serving?
- ▶ What needs do they have?
- ▶ How are they currently performing?
- ▶ How will you meet those academic needs?

# Gathering Target Population Data

Current Levels of Academic Performance Academic performance data for public schools (district and charter) is available from the Arizona Department of Education's website

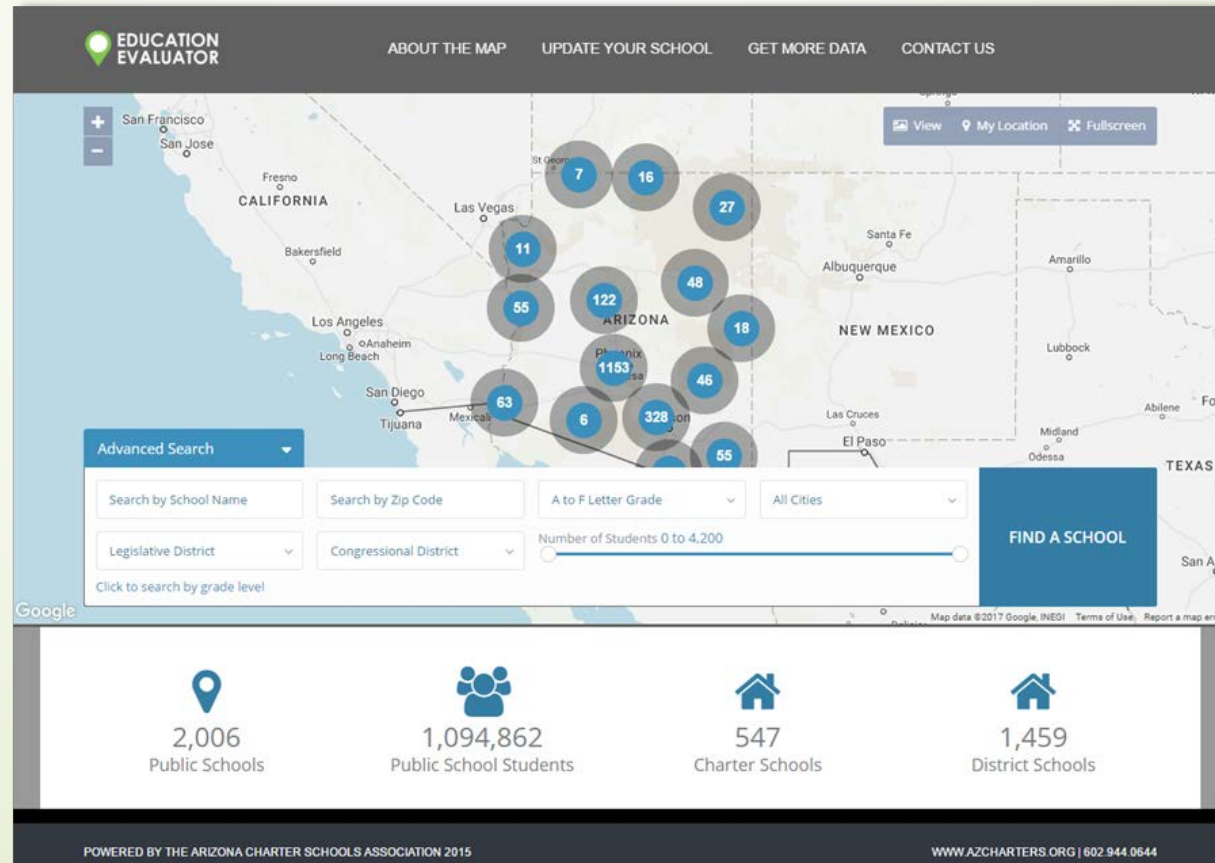
[www.azreportcards.org](http://www.azreportcards.org)



The screenshot shows a web browser window with the URL <https://www.azreportcards.org>. The page title is "Arizona Report Cards" and it includes a sub-header "Achievement Data Downloads". The main content area features a large image of a canyon landscape. Below the image, there are search filters: "Search by School, District or Charter. Districts appear below Schools" with a dropdown menu and a "Get Report Card" button; "Search by Address, City or ZIP Code" with a "Find Location" button; and "View State Report Card by Year" with a dropdown menu. A welcome message reads: "Welcome to Arizona Report Cards, the Arizona Department of Education's new comprehensive school report card system. Explore the site to find details about school, district or charter holder performance, demographics, and more." At the bottom, there are six icons representing different educational entities: a school building, a school building with a steeple, a group of people, a school building with a flag, a school building with a steeple, and a group of people.

# Gathering Target Population Data

Current Levels of Academic Performance - Academic performance data for public schools (district and charter) are available from the Arizona Charter Schools Association's Education Evaluator tool at [educationevaluator.org](http://educationevaluator.org).





## A.3 Program of Instruction

- Provide a clear, comprehensive, and cohesive overview of the curriculum, instructional methods, and assessment strategies for core academic content areas.
- Ensure alignment with Educational Philosophy and Arizona Academic Standards.
- Support improved pupil achievement in the target population.



## A.3 Guiding Questions

- ▶ How will your curriculum demonstrate alignment to the Arizona State Standards?
- ▶ What will instruction look like in your classrooms? What instructional methodology will be utilized?
- ▶ How do these key instructional methods fit your educational philosophy?
- ▶ How will you demonstrate understanding of those key methods?
- ▶ How will you assess mastery of the State standards?





## A.3.1 Mastery and Promotion

This section is only required for schools that will serve grades 8 and below. Do not complete it if you will only be serving grades 9-12.

- Include clear criteria and conditions that guide the promotion decisions.
- Include the proficiency level that demonstrates mastery of grade level core content.
- Present a rationale for the promotion decisions presented.



## A.3.1 Guiding Questions

- ▶ What objective criteria do students have to meet for promotion to the next grade level?
- ▶ How do you make decisions on whether a student gets promoted or retained?
- ▶ What steps are taken when a student is at risk of retention?
- ▶ When are parents alerted? Who is consulted? Who makes the final decision?
- ▶ What is the rationale for the criteria and processes you have identified?



## A.3.2 Course Offerings & Graduation Requirements


This section is only required for schools that will serve grades 9 and above. Do not complete it if you will be serving grades no higher than grade 8.

- ▶ Present a description of the course(s) of study the school will offer and the requirements for earning course credit and graduating.
- ▶ The menu of courses you will provide, criteria for earning credit, and graduation requirements need to comply with statutory mandates.
- ▶ Ensure sufficient resources to implement your course offerings.



## A.3.2 Guiding Questions

- ▶ What are your requirements for earning course credit?
- ▶ What are your requirements for graduating?
- ▶ Do your requirements meet or exceed statutory requirements?
- ▶ What courses will you be offering in each content area?
- ▶ Does your business plan support the range of options you want to offer?



## A.4 School Calendar and Weekly Schedule

- ▶ Present a school calendar showing the number of days the school will be in session.
- ▶ Present a weekly class schedule showing the daily hours or minutes of instruction.
- ▶ Ensure calendar and schedule comply with statutory minimums.
- ▶ List daily instructional minutes of instruction for each core academic content area for each grade.
- ▶ Explain how the chosen schedule supports improving pupil achievement in the target population.



## A.4 Guiding Questions

- ▶ Did you review A.R.S. §15-341.01 on number of school days required?
- ▶ Did you review A.R.S. §15-901 on hours/minutes of weekly instruction?
- ▶ Do your calendar and schedule comply with the statutory requirements?
- ▶ How many instructional minutes will be allotted to each core academic subject?
- ▶ How does this calendar and schedule meet the target population needs identified?
- ▶ Do the professional development days included on your calendar match the action steps described in Area IV of your ASP?



# Educational Plan

The Academic Systems Plan



# Objectives

You will gain an understanding of:

- ▶ Purpose of the Academic Systems Plan (“ASP”)
- ▶ Preparing the ASP
- ▶ Setting baseline performance figures
- ▶ Completing the ASP template
- ▶ Develop comprehensive plans that meet evaluation criteria





# Purpose of Academic Systems Plan

- ▶ Ensuring school's essential systems are in place and appropriate for providing a quality education
- ▶ Through creation of comprehensive, detailed, implementable plan in:
  - ▶ Curriculum
  - ▶ Assessment
  - ▶ Monitoring Instruction
  - ▶ Professional Development
- ▶ Focus school on meeting Board's Academic Performance Expectations

# ASP Template

	Baseline (current performance of target population)	Predicted Target (expected performance in Year 1)
Math		
Reading		

## Narrative for setting baseline figures

Describe the basis for setting baseline figures for math and reading that align with the proposed target population.



## A.5 Evaluation Criteria a), b)

- ▶ Provide baseline figures for Percent Passing in Reading and Math for the target population
  - ▶ Percent Passing – The percentage of the students in the community you intend to serve who passed the State assessment in Reading and in Math
- ▶ Detail the basis for setting the predicted baseline and target figures – the data you used, how you calculated these figures



# Baseline Figures Guiding Questions

- ▶ How did you set the predicted Math and Reading baselines for:
  - ▶ Percent Proficient?
- ▶ What data did you use to set the baseline measure?
- ▶ How did you aggregate the figures?
- ▶ Do the figures align with the information about the target population in A.2?



# Preparing the Areas of an ASP

- ▶ Each Area of the ASP requires detailed action steps.
- ▶ For each action step, provide:
  - ▶ Person(s) Responsible,
  - ▶ Frequency and/or Timing,
  - ▶ Evidence of Implementation, and
  - ▶ Process for implementing the action step

# ASP Template

- ▶ Purpose of ASP – ensuring the school’s essential systems are in place through the creation of a comprehensive, sufficiently detailed and implementable plan.
- ▶ Identify the **Action Step**, using action verbs.
- ▶ Identify the **Person(s) Responsible** for completing the action step.
- ▶ Provide the **Frequency and/or Timing** – how often or when the action step will occur.
- ▶ Identify the concrete **Evidence of Implementation** of the action step.
- ▶ Provide the **Process for implementing the Action Step** here.
- ▶ Add more sections as necessary

*For each Action Step you add, ensure all fields have been completed.*

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation

**Process for Implementing Action Step**

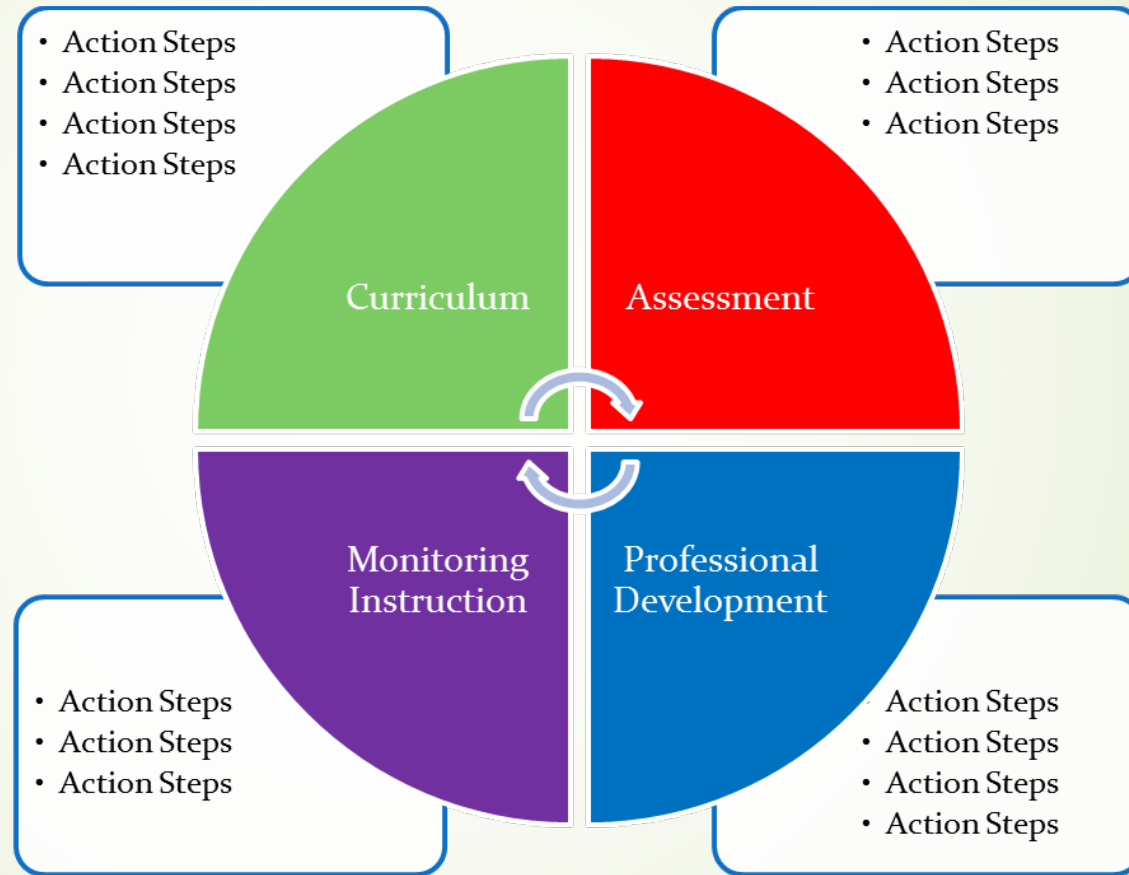
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# Subgroups Addressed in the ASP

- ▶ The ASP asks you to consistently think about how the systems address the needs of student subgroups, including:
  - ▶ Students with proficiency in the bottom 25%
  - ▶ English Language Learners (ELL)
  - ▶ Students eligible for Free or Reduced-Price Lunch (FRL)
  - ▶ Students with disabilities (SPED)

# Creating Action Steps







# Action Step Guiding Questions

- ▶ As you prepare each action step, here are some guiding questions to consider:
  - ▶ Who is responsible for implementation?
  - ▶ When or how often will each action step be completed?
  - ▶ What evidence of completion will be generated?
  - ▶ Is the plan consistent with the application?

# Evaluation Criteria c)

- Evaluation Criteria c) Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive curriculum system.

i.	<b>Adoption of curriculum aligned to Arizona State standards to include:</b>
	<ul style="list-style-type: none"><li>• adopting new and supplemental curriculum,</li><li>• gathering curriculum options,</li><li>• evaluating proposed curriculum programs and materials, and</li><li>• verifying the curriculum is aligned to Arizona State standards.</li></ul>
ii.	<b>Implementation of curriculum to include</b>
	<ul style="list-style-type: none"><li>• integrating curriculum into instruction consistently, and</li><li>• implementing the curriculum with fidelity to the design of the curriculum and program of instruction.</li></ul>
iii.	<b>Evaluation of curriculum to include:</b>
	<ul style="list-style-type: none"><li>• determining if curriculum is effective based on criteria set by the school,</li><li>• ensuring that the curriculum allows students to meet the standards,</li><li>• verifying whether curriculum is aligned to student needs, and</li><li>• identifying if a curricular gap is preventing the students from mastering a standard.</li></ul>
iv.	<b>Revision of curriculum to include:</b>
	<ul style="list-style-type: none"><li>• making revisions to existing curriculum, and</li><li>• replacing/supplementing existing curriculum through adoption of new curriculum.</li></ul>
v.	<b>Adaptation to address the curriculum needs of subgroup populations by:</b>
	<ul style="list-style-type: none"><li>• ensuring that implemented curriculum and supplemental curriculum meet the identified needs of students in subgroups.</li></ul>

# Creating Action Steps

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
Data Review Committee analyzes state assessment results	Principal, Curriculum Coach, grade level lead teachers, a member of the school governing body	Each summer following the release of State data	Data Review Committee Meeting Agendas Data Review Committee Meeting Minutes Completed Data Analysis Worksheets Data Review Committee Recommendation Report

## Process for Implementing Action Step

Each summer, after the release of State assessment results, the Data Review Committee (Principal, Curriculum Coach, Lead Teachers, board member) will analyze the data, disaggregating growth and proficiency scores by:

- Classroom
- Grade Level
- Subgroup

To identify instructional gaps. They will also disaggregate results by Standard to identify curriculum gaps. The data will be compared to predicted results from Benchmark to determine validity/reliability of assessment system. A Recommendation Report with the analysis and identified gaps will be sent to the board for the July meeting, and forwarded to Curriculum Review Committee and Professional Development Committee.



## A.5 Evaluation Criteria g) to j)

- ▶ Criteria addressing details regarding implementation of each action step:
  - g. Frequency and/or timing sufficient for timely completion
  - h. Concrete evidence of completion
  - i. Adequate personnel resources
  - j. Consistency with the rest of the application



# Educational Plan

Instructional Analysis Template




# Objectives

You will gain an understanding of:

- ▶ Required templates for the grades to be served
- ▶ The layout of the template
- ▶ Each required component of the template
- ▶ The evaluation criteria for the components



# New Requirements

- ▶ Curriculum Samples have been eliminated
  - ▶ Instructional Analysis Documents are now required
  - ▶ Fewer documents
  - ▶ Demonstrate capacity
- 



# Purpose of the Instructional Analysis

- ▶ Demonstrates capacity to identify essential skills and knowledge in a specific standard.
- ▶ Describes how instruction is aligned with the educational philosophy.
- ▶ Describes how the program of instruction will be used to develop skills and knowledge.
- ▶ Addresses how student progress and mastery are assessed.
- ▶ Describes the applicant's process for providing support to students that do not make progress or master the standard.



# Grade Spans

- Instructional Analysis Templates are required for Grade Spans, not each grade level.

Grades served include:	K-2 grade span	3-5 grade span	6-8 grade span	9-12 grade span
Instructional Analysis required for:	<i>1<sup>st</sup> grade Reading 1<sup>st</sup> grade Writing 2<sup>nd</sup> grade Math</i>	<i>4<sup>th</sup> grade Reading 4<sup>th</sup> grade Writing 4<sup>th</sup> grade Science 5<sup>th</sup> grade Math</i>	<i>7<sup>th</sup> grade Math 8<sup>th</sup> grade Reading 8<sup>th</sup> grade Writing 8<sup>th</sup> grade Science</i>	<i>High School Science High School Algebra II 11<sup>th</sup> grade Reading 11<sup>th</sup> grade Writing</i>

# Grade Spans

## ► Serving Grades K–2

Grades served include:	K-2 grade span	3-5 grade span	6-8 grade span	9-12 grade span
Instructional Analysis required for:	<i>1<sup>st</sup> grade Reading 1<sup>st</sup> grade Writing 2<sup>nd</sup> grade Math</i>	<i>4<sup>th</sup> grade Reading 4<sup>th</sup> grade Writing 4<sup>th</sup> grade Science 5<sup>th</sup> grade Math</i>	<i>7<sup>th</sup> grade Math 8<sup>th</sup> grade Reading 8<sup>th</sup> grade Writing 8<sup>th</sup> grade Science</i>	<i>High School Science High School Algebra II 11<sup>th</sup> grade Reading 11<sup>th</sup> grade Writing</i>

## ► Serving Grades K–3

Grades served include:	K-2 grade span	3-5 grade span	6-8 grade span	9-12 grade span
Instructional Analysis required for:	<i>1<sup>st</sup> grade Reading 1<sup>st</sup> grade Writing 2<sup>nd</sup> grade Math</i>	<i>4<sup>th</sup> grade Reading 4<sup>th</sup> grade Writing 4<sup>th</sup> grade Science 5<sup>th</sup> grade Math</i>	<i>7<sup>th</sup> grade Math 8<sup>th</sup> grade Reading 8<sup>th</sup> grade Writing 8<sup>th</sup> grade Science</i>	<i>High School Science High School Algebra II 11<sup>th</sup> grade Reading 11<sup>th</sup> grade Writing</i>

# Grade Spans

- ▶ Serving Grades 7–12

Grades served include:	K-2 grade span	3-5 grade span	6-8 grade span	9-12 grade span
Instructional Analysis required for:	<i>1<sup>st</sup> grade Reading 1<sup>st</sup> grade Writing 2<sup>nd</sup> grade Math</i>	<i>4<sup>th</sup> grade Reading 4<sup>th</sup> grade Writing 4<sup>th</sup> grade Science 5<sup>th</sup> grade Math</i>	<i>7<sup>th</sup> grade Math 8<sup>th</sup> grade Reading 8<sup>th</sup> grade Writing 8<sup>th</sup> grade Science</i>	<i>High School Science High School Algebra II 11<sup>th</sup> grade Reading 11<sup>th</sup> grade Writing</i>

- ▶ If the appropriate instructional analysis documents are not included with the application package, the package will be deemed administratively incomplete.

# Overview of the Template

## Instructional Analysis for Grade 1 in Reading

*Provide a complete response for each component below (1 through 7) based on the listed Required Standard. Ensure that each response meets the criteria listed in the left hand column and aligns with the new charter application package.*

Required Standard: **1.RI.2**

Identify the main topic and retell key details of a text.

### **1. Learning Targets**

Identify what students must know and be able to do to demonstrate mastery of the Required Standard.

### **2. Prior Knowledge**


List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.

### **3. Instructional Plan**

Describe the process for presenting new information, necessary for students to meet the learning targets. Describe the instructional strategies used to lead students to meet each of the learning targets identified.

# Overview of the Template

<p><b>4. Instruction</b></p> <p>Describe the activity/tasks students will complete to meet the learning targets. Identify components of the program of instruction and educational philosophy that are incorporated into Instruction.</p>	<p>Evaluation Criteria</p>
<p><b>5. Formative Assessment</b></p> <p>List criteria for determining whether students have met each of the learning targets.</p>	
<p><b>6. Summative Assessment</b></p> <p>Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard.</p>	
<p><b>7. Remediation</b></p> <p>Describe the processes available to provide support to students that do not meet the learning targets.</p>	



# Completing the Template


- ▶ Ensure you are using the word document template
- ▶ Type responses for each component directly into the right hand column (rows will expand as needed)
- ▶ Confirm that the response for each component is aligned with the required standard
- ▶ Ensure that each response meets the evaluation criteria in the left hand column
- ▶ Ensure that each response aligns with the new charter application package



# Learning Targets

Criteria:

Identify what students must know and be able to do to demonstrate mastery of the Required Standard.





# Learning Targets



Guiding questions:

- ▶ What new knowledge and discrete skills will students need to learn to be able to successfully complete a task to demonstrate mastery of the Required Standard?
- ▶ How will a student use the new knowledge to demonstrate mastery of the Required Standard?
- ▶ What tasks must a student be able to successfully complete to demonstrate mastery of the Required Standard?
- ▶ How are these tasks aligned with your educational philosophy and program of instruction?





# Prior Knowledge

Criteria:

List the knowledge/skills that are required prior to meeting learning targets.  
Describe how prior knowledge will be used to introduce the learning targets.



# Prior Knowledge

Guiding Questions:

- ▶ What do the students need to already know to access the new learning targets?
- ▶ What are the previously learned components that will be built upon with this standard?
- ▶ What were the prior standards taught compared to the current required standard to be addressed?
- ▶ Is this knowledge from a prior year or current year? Or is the prior knowledge coming from a different domain?



# Instructional Plan

Criteria:

Describe the process for presenting new information necessary for students to meet the learning targets. Describe the instructional strategies used to lead students to meet each of the learning targets identified.



# Instructional Plan

Guiding Questions:

- ▶ What process will be used to present the new knowledge or skills identified in the learning targets?
- ▶ What methods of instruction will be utilized by the teacher?
- ▶ What is the sequence of instruction that would be used by the teacher to present information to students?
- ▶ Is the process in alignment with my educational philosophy and program of instruction?



# Instruction

Criteria:

Describe the activity/tasks students will complete to meet the learning targets. Identify components of the program of instruction and educational philosophy that are incorporated into instruction.



# Instruction



## Guiding Questions:


- ▶ What activities or tasks will the students engage in to practice and apply the knowledge and skills identified in the learning targets?
- ▶ Do the activities or tasks address all components of the learning targets?
- ▶ Does my description of the activity and/or task demonstrate how the student will process and apply the knowledge and skills to meet the learned tasks?
- ▶ Does the description include components of the program of instruction and educational philosophy?



# Formative Assessment

Criteria:

List criteria for determining whether students have met each of the learning targets.





# Formative Assessment

## Guiding Questions:

- ▶ What criteria will you use and how will you determine the difference between meeting and not meeting the learning targets?
- ▶ Does the criteria address the rigor identified in the instructional plan and measure the skills and knowledge needed to meet the learning targets?
- ▶ How will you determine which skills of knowledge students have mastered, and which they need to continue to work on?





# Summative Assessment

Criteria:

Describe how students will demonstrate mastery of the Required Standard.  
Describe the criteria used to determine whether a student has mastered the Required Standard.



# Summative Assessment

Guiding Questions:


- ▶ What type of criteria will you utilize? Will you use more than one criteria?
- ▶ Do the chosen criteria show student mastery of all of the learning targets?
- ▶ What is considered mastery of the required standard, and is it measurable?



# Remediation

Criteria:

Describe the processes available to provide support to students that do not meet the learning targets.





# Remediation

## Guiding Questions:

- ▶ What processes will be used to reteach students not meeting the criteria discussed in the formative or summative assessments?
- ▶ What instructional strategies will be used to fill the gaps?
- ▶ How do they align with your program of instruction and educational philosophy?



# Operational Plan



# Objectives

You will gain an understanding of:

- ▶ Instructions for application Sections B.1 through B.3.2.
- ▶ Guiding Questions to help develop responses.



## B. Operational Plan

The Operational Plan should provide:

- ▶ An understanding of how the Applicant and school will operate, beginning with its governance and management.
- ▶ A clear picture of the Applicant's:
  - ▶ Operating priorities,
  - ▶ Delegation of responsibilities, and
  - ▶ Relationship with key stakeholders.

It contains 5 sections

- ▶ Section B.3.1 is not required of all applicants.



# B.1 Applicant Entity

- ▶ Describe who is applying for the charter:
  - ▶ Discuss the organization's history and mission, and why you decided to apply for a charter
  - ▶ Identify all the Principals
- ▶ Upload current legal documents establishing entity, including latest revisions
  - ▶ Authority to Conduct Affairs in Arizona.
  - ▶ Ensure consistency with Principal background documentation.





## B.1 Guiding Questions

- ▶ What is the mission of your entity, and how does it relate to running a charter school?
- ▶ Who are the members, partners, directors, or officers of your entity?
- ▶ What documents establish entity?
- ▶ Are your Principals consistent between all documents and all parts of the application package?



## B.2 School Governing Body

- ▶ This section addresses the body which is responsible for the policy decisions for your school.
- ▶ This body may or may not be the same as your corporate board.
- ▶ Outline the roles and responsibilities of the governing members and their qualifications.

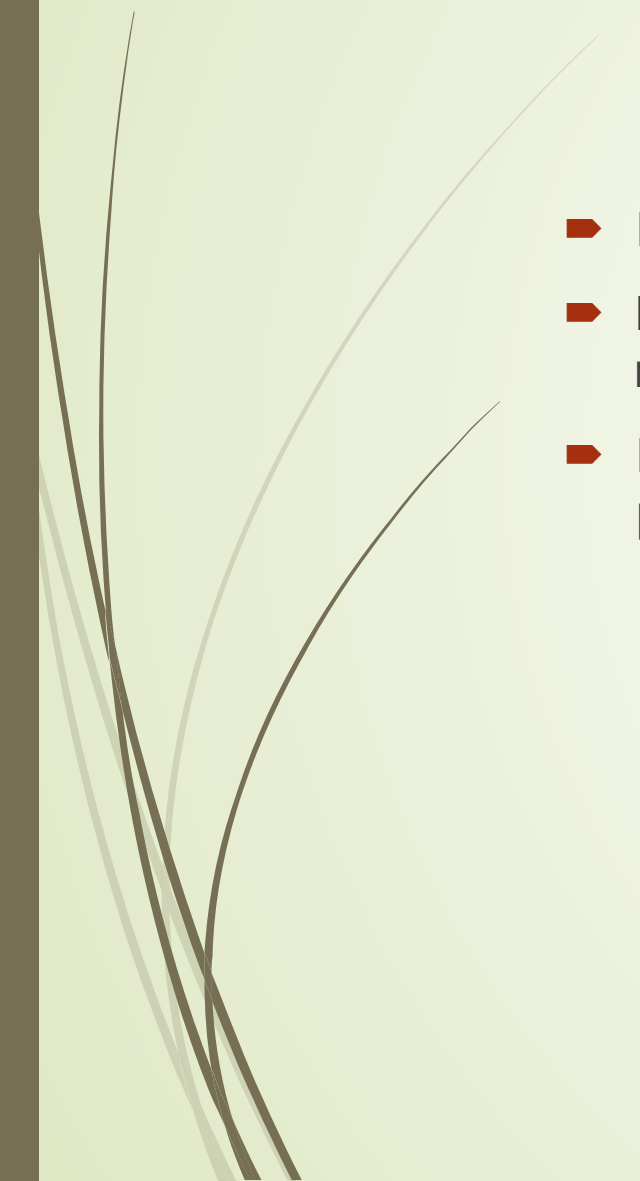


## B.2 Guiding Questions

- ▶ What are the roles and responsibilities of the governing body? Does it meet the requirements of A.R.S. §15-183 (E)(8)?
- ▶ If this body is different from the corporate board, what are the roles of each regarding school operations?
- ▶ How will the composition of the governing body fulfill its requirements and support the school's mission?
- ▶ What is the process for selecting initial governing body members and filling vacancies with qualified governing members?



## B.3 Management & Operation

- ▶ Describe the organizational structure and daily operation of the school.
  - ▶ Include an organizational chart identifying management roles and responsibilities of administrators.
  - ▶ Describe the critical skills and/or experience you will look for in filling those positions.
- 



## B.3 Guiding Questions

- ▶ Are the roles and responsibilities of each position addressed on the organizational chart?
- ▶ Are the oversight responsibilities to instruction and operation viable and adequate?
- ▶ What qualifications will you look for in administrators?



## B.3.1 Education Service Providers

This section is only required for schools that will contract with or have a governance relationship with an Education Service Provider (ESP).

- ▶ Describe why you will be working with an ESP.
- ▶ List what services the ESP will provide.
- ▶ In the required exhibits, list all schools affiliated with the ESP, including those that have closed.
- ▶ Include a copy of the agreement between the Applicant and ESP, or a template version.



## B.3.1 Guiding Questions

- ▶ Why are you engaging with an ESP, in general?
- ▶ Why are you engaging with this ESP, in particular?
- ▶ What services will they provide?
- ▶ How will this further your mission and implement your program of instruction?
- ▶ How will this meet the needs of your target population?
- ▶ How will you evaluate the performance of the ESP?



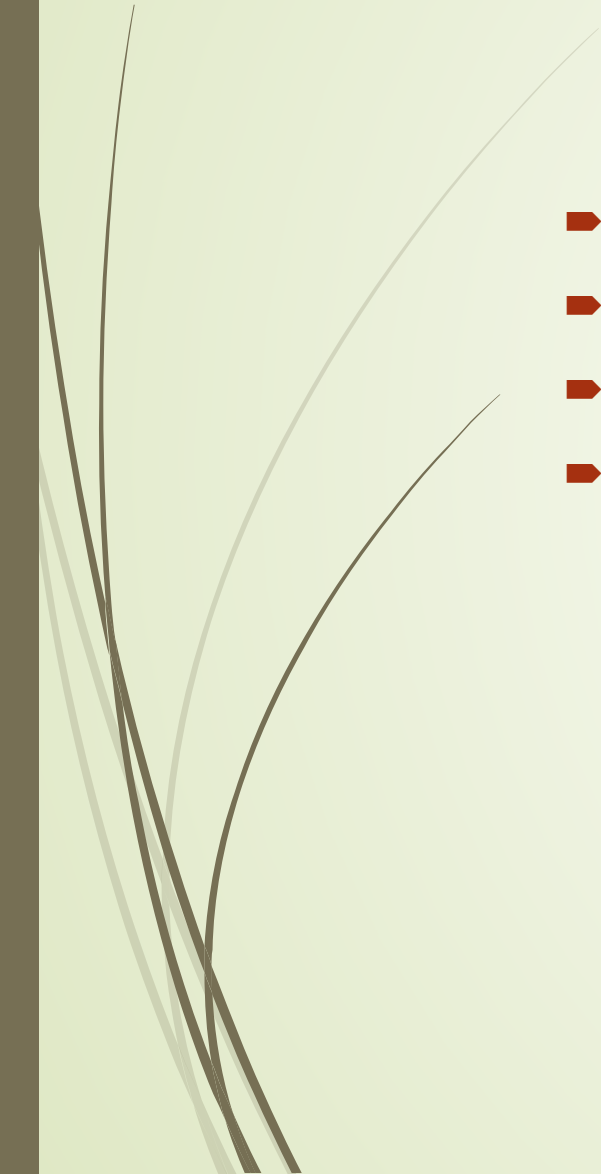
## B.3.2 Contracted Services

- ▶ Identify all areas you will service through a contracted provider. If none, clearly state.
- ▶ Identify minimum professional qualifications and/or experience for each contracted service and specific sources for costs.
- ▶ Discuss how the associated costs for each contracted service are adequate for the target population.





## B.3.2 Guiding Questions

- ▶ What areas require you to seek outside expertise?
  - ▶ What qualifications will you seek in your providers?
  - ▶ How much will these services cost?
  - ▶ Where did your cost information come from?
- 

A decorative graphic on the left side of the slide. It features a solid red arrow pointing to the right, positioned horizontally. Behind the arrow and extending upwards and to the right are several thin, dark, curved lines that resemble stylized grass or reeds. The background is a light, pale green color with a subtle gradient.

# Business Plan



# Objectives

You will gain an understanding of:

- ▶ Instructions for application Sections C.1 through C.5
- ▶ Guiding Questions to help develop responses.
- ▶ Revenue and Budget Templates



## C. Business Plan

The Business Plan should provide:

- ▶ How the Applicant intends to develop and manage the school's financial operations to ensure:
- ▶ A secured facility,
- ▶ Appropriate personnel, and
- ▶ Necessary instructional and operational resources to open and operate your school.

It contains 5 sections, each required of all applicants.



# C.1 Facilities Acquisition

- ▶ Describe the facility necessary to implement your Program of Instruction.
- ▶ Include a layout of space.
- ▶ Include the timeframe and delineate costs necessary to acquire it and prepare it for educational occupancy.
- ▶ Discuss any arrangements already made.

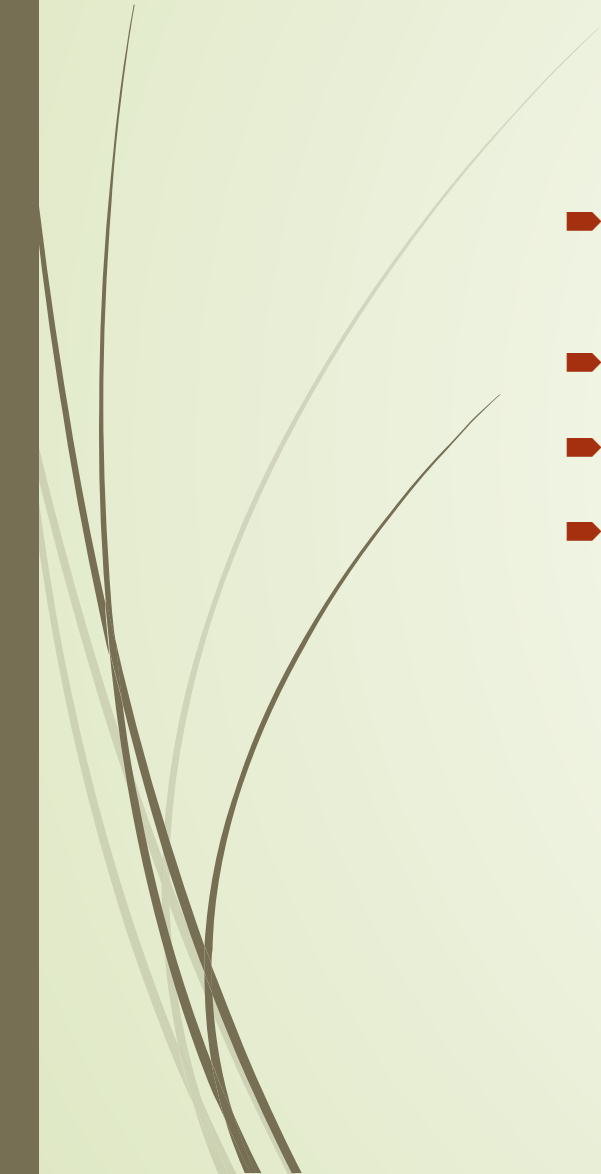


# C.1 Guiding Questions

- ▶ What facility will you need to implement your Program of Instruction?
- ▶ What is available in your target area?
- ▶ Have you made any arrangements for securing a facility? What are they?
- ▶ How long will it take to ready your facility for educational occupancy? What is your timeline?
- ▶ How much will it cost to open your doors?



## C.2 Marketing and Student Enrollment

- ▶ Describe your marketing plan for attracting students and parents to your new school.
  - ▶ Support the enrollment numbers you have identified in your budget.
  - ▶ Describe the enrollment practices you will have for the school.
  - ▶ Identify the documentation collected for enrollment and registration.
- 



## C.2 Guiding Questions

- ▶ What plan do you have for attracting students to enroll at your school?
- ▶ What are the steps in the plan for recruitment and enrollment, and when will they be implemented?
- ▶ How much will each step cost?
- ▶ How did you determine those costs?
- ▶ How will you handle demand beyond capacity?
- ▶ What documents will be collected when a student registers?
- ▶ What documents will be collected when a student enrolls?



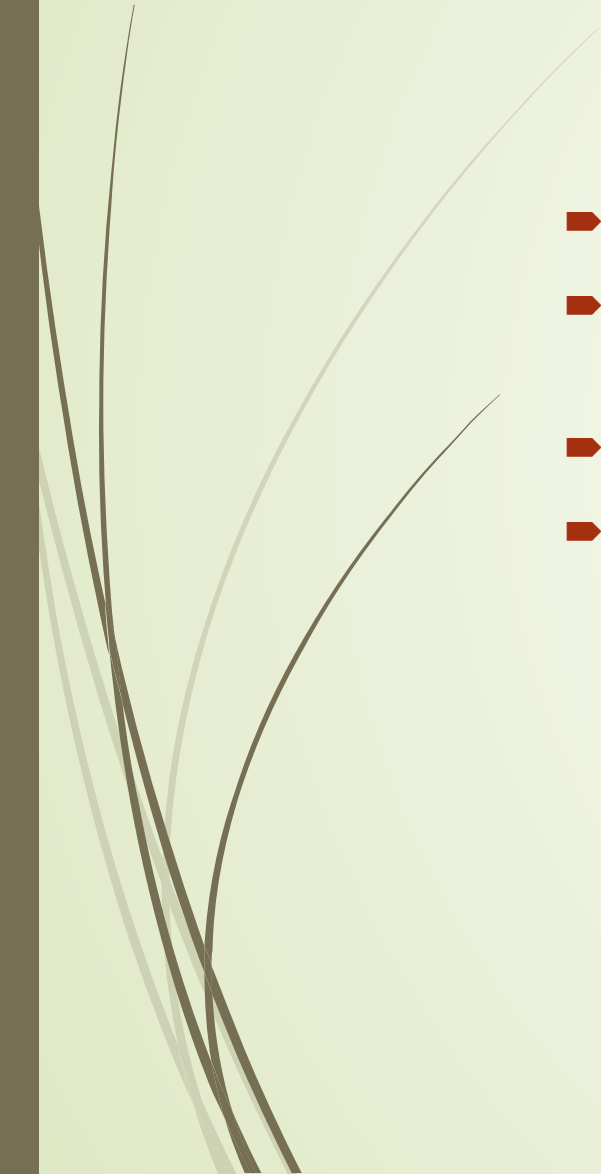


## C.3 Personnel

- ▶ Identify the employees necessary to implement your Program of Instruction and operate your school.
- ▶ Include both instructional and non-instructional personnel.
- ▶ Contracted Services and Personnel together need to indicate sufficient capacity to implement the Program of Instruction.
- ▶ Include the range of grade levels and number of students, you will serve in each of the first three years.
- ▶ Describe recruitment, hiring, and training of staff, and the compensation and benefits that will attract the personnel necessary to implement the Program of Instruction.

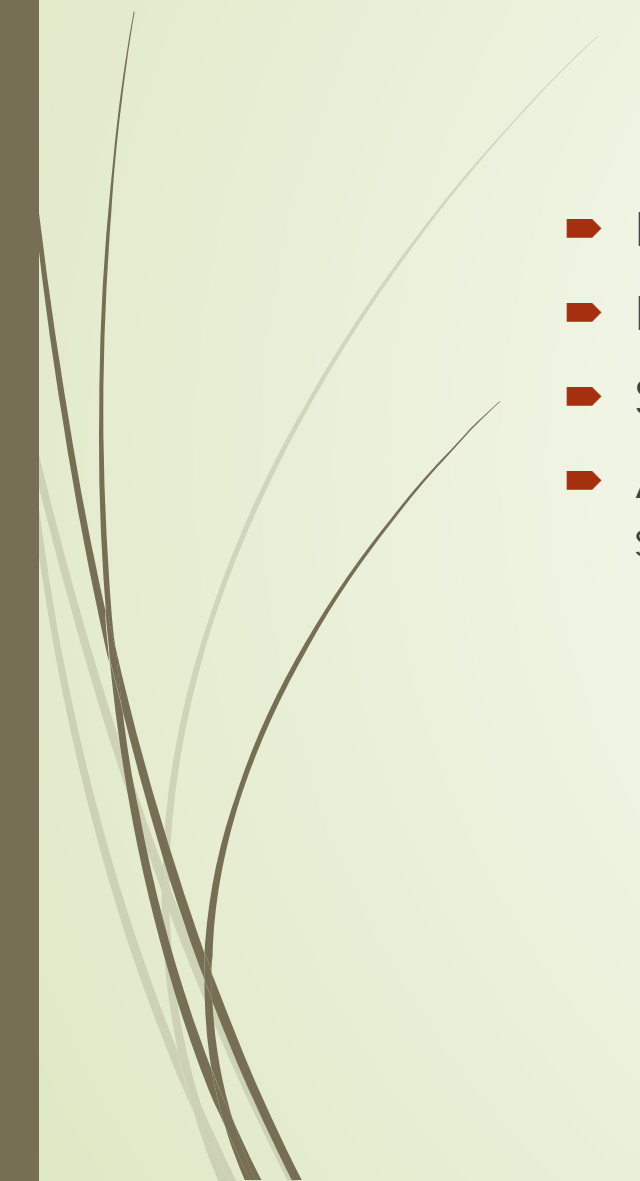


## C.3 Guiding Questions

- ▶ How many students will you have?
  - ▶ How many instructional staff will you need to effectively implement your Program of Instruction?
  - ▶ How will you recruit, hire, train, and compensate your employees?
  - ▶ What qualifications are you looking for?
- 



## C.4 Start-Up Budget

- ▶ Provide a budget for the start-up period.
  - ▶ Enter specific figures in the Start-Up Budget Template.
  - ▶ Support the figures by line in the detailed assumptions document.
  - ▶ All revenue sources need to be documented and secured, and cover all start-up expenses.
- 

# C.4 Start-Up Budget Template

- ▶ List total revenues by source in column E, and when you will acquire the funds in column F.
- ▶ List the number of FTE Employees by type in column B.
- ▶ List the average salary in column C and contributions in column D.
- ▶ Note dates of payment in column F.

C.4 Start-Up Budget - 2018-2019 Cycle

	A	B	C	D	E	F
1						2018-2019 Cycle
2	<b>Applicant Name:</b> _____					
3						
4	<i>Provide Assumptions by Line</i>			<b>Inception to August 1 of Opening Year</b>		
5	<b>START-UP REVENUE</b>				<b>Total \$</b>	<b>Timeframe for Acquisition</b>
6	Secured Funds - Private Donations					
7	Secured Funds - Loans					
8	Secured Funds - Other					
9	Total Start-up Revenue				\$	
10						
11	<b>Administration, Instruction, &amp; Support (AIS) EXPENDITURES (add lines as necessary)</b>	<b># of FTE Staff</b>	<b>@ Salary</b>	<b>Required Employer Contributions per FTE</b>	<b>Total \$</b>	<b>Timeframe for Acquisition</b>
12	<b>Salaries</b>					
13	Director/Principal				\$ -	
14	Teacher-Regular Education				\$ -	
15	Teacher-Special Education				\$ -	
16	Clerical				\$ -	
17	Bookkeeper/Finance				\$ -	
18	Custodial/Maintenance				\$ -	
19	Other				\$ -	

# Verified Proof of Secured Funds

Verifiable Proof of Secured Funds		
<b>Verifiable Proof of Secured Funds</b>		
Applicant Name: _____		
Financial Institution: _____ Branch: _____		
Financial Institution Contact Name (Account Manager): _____		
Address: _____		
Phone Number _____ Email: _____		
Account Holder Type: <input type="checkbox"/> Individual <input type="checkbox"/> Joint <input type="checkbox"/> Organization		
Account Holder Name(s): _____		
_____		
If organizational account: name, position, and contact number of authorized signer:		
Account Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> Other (description): _____		
Last four numbers of account #: _____ Minimum Funds Available for Start-Up: \$ _____		
<i>By signing below, the Account Holder verifies that the funds identified above are available on the date of signing, and authorizes staff of the Arizona State Board of Charter Schools to verify with the financial institution that the Minimum Funds Available for Start-Up listed above are available immediately prior to the Board's consideration of the new charter application package submitted by the Applicant.</i>		
_____	_____	_____
Printed name of Account Holder or Authorized Signer	Account Holder/Authorized Signature	Date
_____	_____	_____
Printed name of second Account Holder (joint account)	Account Holder Signature	Date
<i>By signing below, the Account Manager verifies:</i>		
<i>1. that the funds identified above are available on the date of signing, and</i>		
<i>2. that presentation of this form, signed by the Account Holder, will be sufficient documentation for future verification of the same amount when requested by staff of the Arizona State Board of Charter Schools, which will occur prior to March 1, 2018.</i>		
_____	_____	_____
Printed name of Account Manager	Account Manager Signature	Date



## C.4 Guiding Questions

- ▶ Where will your funding come from?
- ▶ Have you documented the sources of revenue?
- ▶ How much will it cost to open your doors?
- ▶ How did you determine those costs?
- ▶ When will revenues be received and expenses paid?
- ▶ Are your revenues sufficient to cover your expected expenses?



## C.5 Three Year Operational Budget

- ▶ Provide a budget for the first three years of operation.
- ▶ In the budget template, provide specific figures for revenues and expenses.
- ▶ Support figures in templates by providing by assumptions by line.
- ▶ Projected revenue expectations need to be supported by the Projected Revenue Calculator.
- ▶ Enrollment projections need to be consistent with the rest of the application package.

# C.5 Three Year Budget Template

- Enter Student Count in rows 5, 6, and 7
- List carryover balances in row 9.
- List equalization revenue based on student counts in row 12.
- Enter salary figures in rows 21 to 30. Columns E, I, and M will total automatically.
- Enter other figures in the appropriate rows.

	A	B	C	D	E
1	Applicant Name: _____				
2					
3					
4	<i>Provide Assumptions by Line</i>		First Year		
5	STUDENT COUNT (at full enrollment)				
6	Number of Students (Budget based on)				
7	% of Full Enrollment Budget Based On				#DIV/0!
8					
9	CARRYOVER (Balance from Start-Up Budget in year 1 or previous year)				
10					
11	REVENUE				\$ Amount
12	State Funding (Equalization Assistance)				
13	Secured Funds - Private Donations				
14	Secured Funds - Loans				
15	Secured Funds - Other				
16	<b>Total Revenue</b>				\$ -
17					
18	Administration, Instruction, & Support (AIS) EXPENDITURES	# of Staff	@ Salary	Req. Cont.	Total
19	<i>(add lines as necessary)</i>				
20	Salaries				
21	Director/Principal				
22	Teacher-Regular Education				
23	Teacher-Special Education				
24	Instructional Assistants-Regular Education				
25	Instructional Assistants-Special Education				
26	Clerical				
27	Bookkeeper/Finance				
28	Custodial/Maintenance				
29	Other				
30	Other				
31	Employee Benefits				
32	Employee Insurance (if applicable)				
33	Office Supplies (Paper, Postage, etc.)				
34	Instructional Consumables				
35	Membership Dues, Registrations, & Travel				
36	Contracted Services (AIS)				
37	Contracted Services (Special Education)				
38	Curriculum & Resource Materials				
39	Library Resources/Software				
40	SIS Software				
41	Auditor Fees				
42	Other				
43	<b>Total Administration, Instruction, &amp; Support</b>				\$ -
44					



# Projected Revenue Calculator

- ▶ To calculate equalization revenues, use the Projected Revenue Calculator.
- ▶ Enter student counts by grade for each year in the top section.
- ▶ Ensure that the Total matches Row 6 of the Three Year Operational Budget.
- ▶ If you will be using a 200 day calendar, Indicate that in Row B.
- ▶ Projected Revenue figures appear in Row D.

Projected Revenue Calculator			
A. Enter Estimated Student Counts	Year 1	Year 2	Year 3
Kinder			
Grades 1-3			
Grades 4-8			
Grades 9-12			
Total	0	0	0
B. Will you have a 200 Day Calendar?	No	No	No
C. Enter Estimated Student Count Add-On Numbers*			
Hearing Impairment			
ELL (English Learners)			
MD-R, A-R, and SID-R			
MD-SC, A-SC, and SID-SC			
Multiple Disabilities Severe Sensory Impairment			
Orthopedic Impairment (Resource)			
Orthopedic Impairment (Self-Contained)			
DD, ED, MIID, SLD, SLI, and OHI			
Emotionally Disabled (Private)			
Moderate Intellectual Disability			
Visual Impairment			
D. Estimated Equalization Revenue	\$ -	\$ -	\$ -

# Projected Revenue Calculator

- ▶ Extra funding weight given to students with certain attributes
- ▶ Enter well-documented projected student Add-On counts in Section C
- ▶ Support Student Count Add-Ons in the Budget Assumptions.
- ▶ K-3 Add-On and K-3 Reading Add-On automatically included.
- ▶ Section C may be left blank.

Projected Revenue Calculator			
A. Enter Estimated Student Counts	Year 1	Year 2	Year 3
Kinder	100	100	100
Grades 1-3	175	225	275
Grades 4-8	50	75	100
Grades 9-12			
Total	325	400	475
B. Will you have a 200 Day Calendar?	No	No	No
C. Enter Estimated Student Count Add-On Numbers*			
Hearing Impairment			
ELL (English Learners)	50	50	40
MD-R, A-R, and SID-R			
MD-SC, A-SC, and SID-SC			
Multiple Disabilities Severe Sensory Impairment			
Orthopedic Impairment (Resource)			
Orthopedic Impairment (Self-Contained)			
DD, ED, MIID, SLD, SLI, and OHI			
Emotionally Disabled (Private)			
Moderate Intellectual Disability			
Visual Impairment			
D. Estimated Equalization Revenue	\$ 1,930,267	\$ 2,417,603	\$ 2,889,761



## C.5 Guiding Questions

- ▶ How much will it cost to operate a school for the population you are projecting?
- ▶ How did you determine those costs?
- ▶ Are your revenues sufficient to cover your viable and adequate expected expenses?
- ▶ Will you have sources of revenue besides equalization payments?



# Other Considerations



# Consistency



- ▶ The term consistent is used over 35 times in the application.
- ▶ Ensure consistency throughout the application.
- ▶ Educational Plan, Operational Plan, and Business Plan components should all create a cohesive plan.
- ▶ Reviewers will confirm coordination of all narratives and figures across the entire application package.

# Lifecycle of a New Application





# Contact Information

- ▶ If you have questions or need clarification, you may contact Board staff.
- ▶ E-mail: [charterschoolboard@asbcs.az.gov](mailto:charterschoolboard@asbcs.az.gov)
- ▶ Phone: 602-364-3080