B.1 APPLICANT ORGANIZATION

Organizational History and Relevant Experience

The Southwest Leadership Academy (SLA) was formed, for educational and charitable purposes, by its Board members on June 22, 2011. Southwest Leadership Academy has no current operations, and was formed for the purpose of creating an educational program in Arizona. Bylaws and Articles of Incorporation were created and submitted to the Arizona Corporation Commission in June 2011. An EIN number was obtained in May 2011 and an application for a 501(c)(3) status is in process.

While the Board members will be responsible for the governance of SLA, to effectively operate a successful educational program, the Board recognized the need for the services of a Charter Management Organization (CMO). Rite of Passage, Inc., the chosen CMO, supports the capabilities of the Board to operate the proposed Southwest Leadership Academy school because of their vast and extensive experience.

Relevant Experience

Rite of Passage is a private, for-profit company established in the State of Nevada. Rite of Passage successfully operates, manages and oversees the operations of schools in several states: Arizona (*Canyon State Academy, Sycamore Canyon Academy and Prestige Day School*), California (*Rite of Passage Charter High School*), Colorado (*Ridge View Academy, Betty K. Marler Youth Services Center and Lookout Mountain*), Maryland (*Silver Oak Academy*), Louisiana *(Crescent Leadership Academy)* and Nevada (*Rite of Passage Charter High School(s) - Minden and Yerington locations*). Their campuses are accredited by the local school agency, the state departments of education, North Central Association of Colleges and Schools and the Western Association of Schools and Colleges.

In Arizona specifically, Canyon State Academy's school program operates on a year-round basis and is designed to meet the individual educational needs of each student. Accredited by the North Central Association of Colleges and Schools, and supported by the Arizona Department of Education (ADE) as a voucher school, Canyon State Academy offers a range of instructional services from basic skills remediation to a full high school curriculum and diploma. Students attend classes six hours per day on–site, in modern school facilities furnished with up-to-date learning aids and technology. This campus offers a wide range of opportunities and programs to its students and because of this, accomplishments are diverse.

Target Population Experience. While Rite of Passage has years of experience operating schools, it is their experience with disadvantaged and at-risk youth that is also important to the operation of Southwest Leadership Academy. Rite of Passage has a high level of competency with our targeted population, boasting 28 years of experience operating or managing 15 residential and five non-residential/community-based programs for disadvantaged and at-risk youth. These youth are brought into their programs from social service and child welfare agencies as well as juvenile courts from over 15 states. With their emphasis on evidence-based practices and positive skill development combined with a supportive approach to working with youth, this organization has served over 20,000 youth similar to the target population identified.

Accomplishments. Some of the recent achievements by students at Rite of Passage's Canyon State Academy and other similar schools include:

- Sportsmanship Award and Volunteerism Award from Special Olympics, Arizona Interscholastic Association and Grand Canyon State Games
- Received Presidential Physical Fitness Award and recognized as most fit school in Arizona
- Placed 5th and 6th at 4H State Livestock Finals held in Reno, Nevada
- Participated in the Youth Science Institute and earned certificates of completion (transferrable to college credit)
- Began post-secondary education opportunities through AXIA College on-line courses
- On-site ASVAB testing to prepare students for military enrollment/career opportunities
- Selected as a model by Colorado Department of Education for Anti-bullying program (Ridge View Academy)
- Winner of the Grand Canyon State Games Essay Contest (grades K-12)
- Winner of State award for essay on Civil Rights
- College enrollment and credits earned by students in several programs
- Winner (multiple years) of the Colorado Robotics Regional Championship
- Horticulture/Culinary Program recognized at La Plata County Fair earning over 33 ribbons including Grand Champion
- Wrestling team won sportsmanship award at Keasar Invitational
- Awarded the Nevada Interscholastic Activities Association Award of Excellence
- Junior Achievement partnership in Colorado's Ridge View Academy

The primary business Rite of Passage operates is centered on its mission of "improving the lives of youth." Additionally, Rite of Passage has extensive experience in applying the Positive Youth Development (PYD) philosophy throughout all of its programs. Rite of Passage's programs have been developed and operate based on the needs of youth and each community.

Rite of Passage has earned an established reputation as an effective educational services provider. Their students have been served through a variety of local school agencies with an emphasis on providing individualized instruction and special education services under fully licensed and accredited programs. This experience with delinquent youth has helped Rite of Passage be successful with the development of a Private Day School in Arizona.

Decision to Operate a Charter School

In the fall of 2009, the three founding members of the Board (Harriet Caruso, Barry McBride and Michael Gantt) began formal discussions for the creation of a charter school. The charter school model was selected so we could reach a larger number of high school students, hire specialized

Teachers for each subject, and provide students an opportunity to benefit from the type of scaffolded, rigorous instruction that will be emphasized at SLA.

The motivation to start the new high school was based on the need we saw to provide options to the traditional high school model, and to treat the whole student. In June of 2011, Southwest Leadership Academy was formed and submitted a Charter Application to the Arizona State Board for Charter Schools (ASBCS) with a target population of students who feel alienated and disconnected in large public schools, and who may be at-risk for academic failure. This application was not approved by ASBCS as it was administratively incomplete.

This year, we are working with a target population (students who are disadvantaged and at risk of failure due to academic, social or economic factors, expelled from high school or high school dropouts, or transitioning from the juvenile justice system) in the West Phoenix area. We have a well-researched program of instruction, and our mission is aligned with these efforts. Consistent with the Bylaws and Articles of Incorporation, the Board members and the CMO will serve targeted students through combined experience and a renewed commitment. In line with that commitment, the Board has chosen a location to best meet the academic needs of our students.

Our CMO's experience working with this target population has benefitted thousands of youth, and today serves nearly 2,000 youth in its various schools and programs. Rite of Passage aims to support the student who needs a structured environment that reduces distractions and aids in focusing on academics. The goals of the new charter school, Southwest Leadership Academy, will be to provide a path for at-risk and disadvantaged students to gain knowledge in the classroom as well as become skilled at positive pro-social interactions.

Board Composition

Southwest Leadership Academy was established with a Board of Directors consisting of three members including Harriet Caruso, President; Michael Gantt, Secretary and Barry McBride, Treasurer. The initial Board members have distinct skill sets, educational perspectives and dedication to creating an education model for at-risk and disadvantaged students. Future Board members will be appointed by a majority vote once a charter is granted and will be made up of a cross-section of community members, educators and business leaders.

Southwest Leadership Academy has never operated any current or prior charters. However one SLA Principal, Harriet Caruso, is currently the Assistant Superintendent at Career Success High School. This school was established in Arizona on March, 17, 2000 and has several campuses around Phoenix. She has worked with Career Success since 2004 in the capacity of compliance, training and program administration.

Reporting Structure and Organizational Chart

SLA's Board of Directors will ensure the integrity of the charter granted by the Arizona State Board for Charter Schools is upheld. Its laws and regulations will be met by the Board of Directors and its CMO. The Board has selected Rite of Passage as its CMO, who will operate under a Management Agreement, providing day-to-day operations of the school.

Through this Management Agreement, the CMO will report to the SLA Board. All staff working at SLA will be employees the CMO, Rite of Passage, and will be leased to the school. The Principal will be the key administrator at SLA, and will supervise (directly and indirectly) all staff including the Vice-Principal, Counselor, Instructional Leader, Teachers, Behavioral Mentors, Registrar and Janitor/Maintenance. In the second year, when the Vice-Principal is hired, the Behavioral Mentors will report directly to the Vice-Principal. The organizational chart illustrating this reporting structure is found in Exhibit 2 of this Section.

Roles and Responsibilities of the Principals

Southwest Leadership Academy's Governing Board will be made up initially of the three members. These individuals will not play a role in the day-to-day operation of the school. Rather, they will fulfill the duties to maintain state and federal requirements for corporations (IRS 501(c)(3) status and tax filings, and Arizona Corporation Commission requirements) and meet all requirements of the charter granted by the Arizona State Board for Charter Schools.

Some of the areas of focus our current founding Board members will concentrate on are:

- *Harriet Caruso (President and Principal):* Community Outreach, Educational Programs, School Improvement, Education Initiatives, Funding Resources
- *Michael Gantt (Secretary and Principal):* Professional Development, Public Policy, Leadership Training, Administration of Corporate Affairs, Education
- *Barry McBride* (*Treasurer and Authorized Representative*): Finances, Legal Compliance, Fundraising, Public/Private Partnerships

The Southwest Leadership Academy Governing Board will work in collaboration with its CMO's management team to ensure responsibilities are fulfilled, which include, but are not limited to:

- Establish the mission and vision of the school
- Provide overall governance of the charter school and monitor performance of CMO
- Fulfill its commitments and contractual obligations to the Arizona Department of Education and the State Board, as defined in this charter
- Formulate policy and procedures needed to accomplish the educational mission of the school (compensation, document retention, non-discrimination, fundraising, investment, recordkeeping, code of ethics, etc.)
- Maintain full and accurate meeting minutes
- Review and approve major organizational decisions, commitments and plans including expenditures, senior hires, loans and leases
- Assist with the selection of a Principal in collaboration with the CMO and CMO's Director of Education
- Create a rotation system for Board membership and develop a method of sharing information about the school with parents, the CMO, and outside stakeholders

- Approve annual budgets, review of annual audit, 990 Returns and quarterly financial reports
- Review, approve and monitor student academic achievement and the school's Performance Management Plan
- Act as the final body of appeal in the grievance process for school community members
- Working in conjunction with CMO to approve the core curriculum, class sizes and student-to-teacher ratios
- Ensure the Board complies with the State's Open Meeting Laws when applicable