AGENDA ITEM: NEW CHARTER APPLICATION – SYNERGY PUBLIC SCHOOL

Synergy Public School ("Synergy") submitted a complete new charter application package to serve grades Kindergarten through five for the Arizona State Board for Charter School's ("Board") consideration. The application package meets the minimum scoring requirements set by the Board for the 2017-2018 application cycle.

REPORT SUMMARY

Applicant Name: Synergy Public School

Authorized Representative Name: Lori Weiss

Proposed School Name: Synergy Public School

Proposed School Location: West Central Phoenix, east and west boundary between 43rd Avenue and 15th Avenue, north and south boundary between Glendale Avenue and Washington Street.

Mission Statement: The mission of Synergy Public School is to ensure that all children experience a challenging and progressive child-centered educational program that fosters a love of learning and empowers students to be productive, caring and responsible citizens that are college and career ready.

Target Population: The targeted location will include portions of Alhambra Elementary School District, Isaac School District, and Phoenix Elementary School District. Approximately 30,000 students ages 5 to 14 live in the target area. Demographically 72% are Hispanic, 14% are White, 6% are Black and 8% are of other races, including Native American and Asian. Synergy Public School will serve families whose median income is approximately $28,000, where 40% of the students live in poverty and 41% live in households that receive public assistance.

Student Count

Year	Grades Served	# of Students
1	K-3	200
2	K-4	350
3	K-5	425

School Calendar
Standard, 184 days

Target Start Date
August 2, 2017

Application Package Scoring

	Preliminary TRP Scores		Revised TRP Scores	
Any **Falls Below the Expectations** ratings?	No		No	
Any section in which more than one evaluation area scored **Approaches**?	Yes		No	
		Percent Meets		Percent Meets
Educational Plan Score ≥ 95% Meet standard?	No	78%	Yes	100%
Operational Plan Score ≥ 95% Meet standard?	Yes	96%	Yes	100%
Business Plan Score ≥ 95% Meet standard?	No	87%	Yes	100%

The Technical Review Panel ("TRP") provided Synergy 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 interview.

In-Person Interview Summary

During the in-person interview the Applicant responded to the questions regarding the submitted (Educational, Operational, Business) Plan.

All members of Synergy's team were present at the capacity interview and were able to respond readily to questions about all parts of the application package. Although the TRP was impressed with the overall quality of the written plan, they did have concerns about Synergy's decision to use a teacher-created curriculum, their ability to share decision-making without a hierarchical structure, and about a proposed board member's ability to hold her former colleagues and future employees accountable for their performance. During the capacity interview, these concerns were allayed by Synergy's responses, their shared belief in the school's mission and vision, and evidence of shared values and experience with the target population.

TRP concerns about Synergy's ability to guide teachers in creating a unique curriculum were satisfied by the strong responses during the capacity interview. Melissa McKinsey, proposed Executive Director of Academics and co-founder, was able to explain in greater depth the team's decision to use curriculum creation as a way of engaging instructors, giving them program ownership, and increasing their skill and awareness of the standards (Synergy Capacity Interview, 10:47). This strategy aligns with Synergy's stated emphasis on servant leadership, that is, leading by nurturing and supporting others, rather than taking a top-down leadership approach (Synergy Capacity Interview, 35:45). TRP concerns that Synergy teachers might not have sufficient time to create a curriculum in the timeframe provided in the application package were addressed when Synergy revealed that they have already created a framework to guide teachers in their work, which, in the TRP's estimation, will provide sufficient guidance to ensure the work will be completed on-schedule (Synergy Capacity Interview, 29:25).

Melissa McKinsey and proposed Executive Director of Business and Operations and co-founder Lori Weiss, collaborated on interview responses, supporting one another and acknowledging each other's strengths and weaknesses. Their responses showed a clear mutual respect and shared philosophy that convinced the TRP that they thrive under a shared leadership model. Proposed board member, Sandra Kennedy, clearly demonstrated that she understands the policy role of a governance team member and the TRP was persuaded that she will hold the school administration responsible, but support them when needed (Synergy Capacity Interview, 25:20).

Qualitative Analysis Summary

The TRP recommends that the application package for Synergy be approved because the selected instructional strategies are clearly linked to the anticipated needs of the target population, the proposed school leaders are passionate, organized, and detail-oriented and have decades of experience working with the target population, and school budgeting is conservative and plans for contingencies.

Synergy Public School plans to serve a historically underserved community of high poverty with persistent performance gaps, and proposes an academic program that clearly addresses many of the needs of the target population. Synergy's program offers increased rigor, character development, leadership training, after-school enrichment, and a "trauma sensitive" and positive behavioral approach that is focused on rewarding and reinforcing positive behaviors with awareness and sensitivity about past student trauma. This approach will both challenge students and support them as it closes performance gaps. Synergy's plan to develop new teachers through the process of guided curriculum creation provides strong instructional support. The proposed assessment regimen is comprehensive, with multiple instruments and plans to share, analyze, and use data to improve instruction. The proposed school leaders have decades of experience working with the target population and impressed the TRP in the capacity interview with their depth and breadth of knowledge and their commitment to collaboration.

Synergy's operational plan is sufficiently detailed and demonstrates Synergy's capacity to think through and manage large, complex projects. Board duties are clearly described and demonstrate an awareness of the essential qualities of strong school governance that was reinforced by the team's responses during the capacity interview.

Operational responses are tied to the budget throughout the application package and suggest that Synergy's team will make prudent instructional and operational decisions in the future.

Budgeting is conservative and Synergy takes care to preserve a significant reserve each year as a contingency against funding fluctuations or unplanned expenses. Ms. Kennedy's experience overseeing state and federal budgets and Ms. McKinsey's experience managing school budgets add financial capacity to the Synergy team.

A. EDUCATIONAL PLAN

The following summary was created from excerpts and summaries of the documents submitted for the Applicant's Educational Plan.

Plan Summary

Synergy Public School proposes serving a high-needs population in grades Kindergarten through five through a number of specific strategies including: engaging instructors through self-created curricula; focusing on character and leadership education; involving families through home visits, frequent meetings, quarterly conferences, and parent education classes; emphasizing student social and emotional development; and creating collaborative and cooperative classrooms. Their program will focus on capturing, sharing, and analyzing data and will feature an extended school day and use of blended and face-to-face learning.

The target population is 72% Hispanic and 40% live in poverty. Synergy plans to offer a daily 30-minute intensive intervention program and will focus on maintaining regular attendance, supporting English Language Learner and Special Education students, and will offer after-school programs. The planned class-size ratio is 1:20 for Kindergarten and 1:25 for grades one through five.

In addition to self-created curricula, Synergy will use Success for All, a reading intervention program designed for underprivileged children, Scholastic for its reading program, and Ron Clark's The Essential 55 for character development. The Essential 55 teaches students positive social habits they may not have learned at home. Instructional strategies include cooperative learning; Marzano's high-yield strategies, which provide a simple framework of effective classroom practices for teachers; gradual release of responsibility, in which students are led to self-control and manage their own work over time; and differentiation. Teachers will be supported through ongoing professional development and weekly professional learning community meetings.

Synergy's assessment plan includes baseline and quarterly assessments. Tools used include Northwest Evaluation Association Measure of Academic Progress, which provides norm-referenced performance data that can be compared to students nationally, Success for All reading assessments, 4Sight Arizona College and Career Readiness Standards Benchmark Assessments to gauge student knowledge of Arizona standards, Galileo Benchmark Assessments, and the required state assessment regimen.

ASP

The Academic Systems Plan ("ASP") for new applicants is a continuous school improvement plan that ensures the applicant is ready to implement systems for meeting the Board's academic performance expectations.

Synergy Public School submitted an ASP that met the criteria in all areas.

Curriculum Samples

Curriculum samples were provided for grades Kindergarten through five. The table on the following page indicates which curriculum samples in the revised application package met all Board requirements (+), and which had deficiencies (-).

Grade	Math	Reading	Writing	Science
K	+	+	+	
1	+	+	+	
2	+	+	+	
3	+	+	+	
4	+	+	+	+
5	+	+	+	

Educational Plan Findings

	Preliminary TRP Scores		Revised TRP Scores	
Educational Plan Score ≥ 95% Meet standard?	No	46 of 59	Yes	59 of 59
Number of "Falls Below" ratings	0		0	
Number of "Approaches" ratings	13		0	

Analysis of Educational Plan

The educational plan meets the criteria for approval because the selected instructional strategies are clearly linked to the anticipated needs of the target population, the curriculum strategy will engage instructors and create program ownership, and the assessment regimen is rigorous, uses multiple measures, and is appropriate for a school with a data-driven instructional approach.

Synergy presents multiple data points indicating that their target population has been negatively impacted by language deficits, poverty, and high crime rates and links these factors to low performance in neighborhood schools, showing "a clear disparity between primary and middle schools, which ultimately widens the achievement gap as student's progress through the grades" (Educational Plan A.2, p. 7). Synergy's planned program focuses not only on increased academic rigor, targeting the aforementioned gap in a direct way, but also targets the factors creating this gap through character development, leadership training, after-school enrichment programs, and a "trauma sensitive and positive behavioral approach to remove the barriers to learning that occur when behaviors are disrupting the learning community" (Educational Plan A.1, p. 4). Focusing on character development will also provide an important support; Ron Clark's The Essential 55 was developed with a high-needs, high-poverty population specifically in mind. The planned supports and culturally sensitive approach to addressing negative factors has a high likelihood of success underscored by the team members' history of decades of work with the target population (Synergy Capacity Interview, 21:00).

The TRP had initial concerns about the founding board's ability to engage and lead instructors to create much of the school's curriculum in time for successful program implementation, but these concerns were alleviated when the two founders and proposed executive directors communicated during the capacity interview that they are aware of the tight timeline and have already developed frameworks for instructors to work within (Synergy Capacity Interview, 29:25). With these pre-developed frameworks in place, instructors should have sufficient time to develop curricula that align with Synergy's mission and vision, are differentiated and impactful for the target population, and which give instructors a connection to their work through the "sweat equity" they have contributed.

The assessment plan is rigorous and comprehensive, including formative and summative measures aligned to curriculum and multiple means of benchmarking. The plan allows Synergy to compare student performance within the school building and also to compare its own students to other students across the state and across the country. Assessment data will be gathered daily, quarterly, and annually and the founders articulate a clear plan for collecting, sharing, and analyzing this data to improve instruction and to increase student success (Educational Plan A.1, p. 7).

B. OPERATIONAL PLAN

The following summary was created from excerpts and summaries of the documents submitted for the Applicant's Operational Plan.

Synergy Public School is a non-profit corporation, located in Phoenix, Arizona, that was created on November 30, 2015 for charitable, educational, scientific and literary purposes with three Directors: Lori Weiss (took office on November 30, 2015), Melissa McKinsey (took office on November 30, 2015) and Sandy Kennedy (took office on April 6, 2016).

Plan Summary

The corporate board of Synergy Public School is the governing board of the school. The governing board will focus on governance; policy; strategic and financial planning; legal, regulatory, and executive director oversight; school promotion; and public accountability. Synergy's board will use Board on Track for trainings and plans to elect a chair, vice-chair, treasurer, and secretary. Planned committees are governance, finance, academic achievement, and development. The board plans to expand its size to seven members after approval and has provided a list of likely board candidates.

School leadership will be shared between two executive directors, one overseeing business and operations and the other overseeing academics. Both executive directors report directly to the board of directors. In Year 3, a principal will be added who will report to both executive directors and whose focus will be on teacher management and instructional execution.

Contracted services include financial management, human resources (including benefits and insurance), special education services, legal services, auditing, information technology, facility services, and food services.

School Governing Body Member Type	Number	Name
Organization Principal	3	Lori Weiss Melissa McKinsey Sandy Kennedy
Other – Business Community	4	To be determined

Principal Background Information

Authorized Representative and Principal: *Lori Weiss*
Confirmed Education History: Masters in Educational Leadership, Northern Arizona University 1996
Confirmed Employment History: Alhambra Elementary School District, Executive Director of Leadership Development, January 2015 – present, Principal Westwood Primary School July 2005 – December 2014
Arizona FCC Expires: December 15, 2021
Current or Past Charter Affiliations[1]: None

Principal Name: *Melissa McKinsey*
Confirmed Education History: Masters in Educational Leadership, Northern Arizona University 2006
Confirmed Employment History: Alhambra Elementary School District, Principal/Outreach Coordinator/ Academic Coach/ Teacher, August 2002 – present
Arizona FCC Expires: August 15, 2022
Current or Past Charter Affiliations[1]: None

Principal Name: *Sandra Kennedy*

[1] *In this section, "Current or Past Charter Affiliations" refers to a leadership or decision-making role in an existing charter school operation, such as charter representative, charter principal, or school site leader.*

Confirmed Education History: Master of Elementary Education, Northern Arizona University 1999
Confirmed Employment History: Center for the Future of Arizona, Lead Mentor, July 2014 – present; Alhambra Elementary School District, Principal, July 2005 – June 2014
Arizona FCC Expires: September 8, 2018
Current or Past Charter Affiliations[1]: None

Operational Plan Findings

	Preliminary TRP Scores		Revised TRP Scores	
Operational Plan Score ≥ 95% Meet standard?	Yes	25 of 26	Yes	26 of 26
Number of "Falls Below" ratings	0		0	
Number of "Approaches" ratings	1		0	

Analysis of Operational Plan

The operational plan meets the criteria for approval because the governance section is detailed and reflects careful planning, the administrative structure is ideally suited for the proposed staff and reflects the school philosophy, and the plan for managing contracted services is highly detailed and strategic.

Synergy's submitted plans for the governing board's focus, procedural norms, and structure are highly detailed and give confidence that the board will remain focused at a policy level and will not involve itself in micromanaging or administrative tasks. Synergy submitted several examples of approved policies – including policies for records retention, signature authority, and whistle-blowing – that are well-crafted and will provide a strong start for the school as the board supports the school leaders in implementing the plan (Operational Plan B.1, Synergy Policies, pp. 21, 28, 33). Descriptions of board officer duties are clear, concise, and logical and the detailed committee descriptions show that Synergy understands the importance of distributing leadership to increase capacity related to important decision-making (Operational Plan B.2, pp. 2-3). Although only one proposed school board member attended the capacity interview, her responses evidenced not just a deep understanding of policy-based governance, but a history of working with students and parents from the target population (Synergy Capacity Interview, 21:00). Additionally, Synergy provided a list of nine individuals who may be asked to serve on the board (Operational Plan B.2, p. 7).

The proposed executive directors are clearly passionate and both have decades of experience working with the target population. Their resumes show impressive depth and breadth in the areas of instruction and school administration. The interview team had concerns before the capacity interview related to the proposed leaders' ability to share leadership equally, but both proposed leaders were aligned philosophically and practically, clarifying that, while they might not always agree about everything, they do agree on the importance of focusing on outcomes and doing what is in the best interest of students (Synergy Capacity Interview, 1:12:00). The interview also revealed that both leaders are capable of overseeing either instruction or operations. Ms. McKinsey has experience in preparing budgets, monitoring expenditures, and overseeing school operations, and Ms. Weiss has extensive instructional experience. This overlap will allow them to shift focus to assist each other when necessary. The plan to introduce a school principal in Year 3 allows the school to put increased focus on instruction as they grow, ensuring that underserved students will continue to have gaps addressed and academic needs met (Operational Plan B.3, p. 1).

The contracted service plan provides further evidence of Synergy's attention to detail. All services are listed, with rate quotes for all three years projected under the charter, with service providers listed and with the source quotes delineated (Operational Plan B.3.2, p. 5). These quotes are accurately captured in the three-year operational budget.

C. BUSINESS PLAN

The following summary was created from excerpts and summaries of the documents submitted for the Applicant's Business Plan.

Plan Summary

The business plan includes three facilities options all located within the target area. A timeline for securing the facility and projected facility costs are also included. All three options include a plan for growth through the first three years of the charter contract. The advertising and promotion plan includes a table identifying all outreach actions and includes action timing, details, responsible parties, and estimated costs (Business Plan C.2, pp. 3-9). A promotion strategy plan is provided, listing 10 topics school representatives will use to persuade families to enroll their children at the school.

The personnel plan details a number of staff recruitment strategies, including higher education, job fairs, digital listings, and Teach for America corps members. A table is provided showing steps for processing new employees. The plan also includes a description of planned professional development and describes the teacher observation process.

The start-up budget includes employee salaries, equipment, and consumables. Membership dues, registration, travel, and operations and maintenance expenses are also detailed. Start-up revenues exceed expenses by $103,400.62, which will serve as contingency funds in the event of delay in equalization pay for August of 2017. Revenue calculations for the three-year operational budget are based on 90% of anticipated full enrollment.

Facility Information

Proposed School Name:	Synergy Public School
Proposed Locations:	Unconfirmed location • 3345 N. 19th Avenue, Phoenix, AZ 85015 • 1726 W. Camelback Road, Phoenix, AZ 85015 • 3615 N. 27th Avenue, Phoenix, AZ 85017
Facilities Requirements:	The target facility will consist of a calculation of 45 – 57 square feet per student. • Projected enrollment for Year 1: 200 students, equates to a desired facility range square footage of 9,000-11,400. The facility will contain a minimum of 8 regular general education size classroom spaces, 1 conference room, 1 multi-purpose space, 1 teacher work room, 3 administration offices, 1 storage room, 1 office entry area, 1 area for special education and contracted services, restrooms and drinking fountains. • Projected enrollment for Year 2: 350 students, equates to a desired facility range square footage of 15,750-19,950. In addition to the types of rooms addressed in Year 1, the facility will increase from 8 to a minimum of 14 regular general education size classroom spaces. • Projected enrollment for Year 3: 425 students, equates to a desired facility range square footage of 19,125-24,225. In addition to the types of rooms addressed in Year 1, the facility will increase the number of regular general education size classrooms to 17.

Budget Summary

Synergy has secured a grant from Arizona Department of Education, Arizona Charter Schools Program for start-up purposes. The secured funds, in the amount of up to $300,000 as stated by Synergy, are available as confirmed by the Arizona Department of Education.

The table below presents a summary of the budget by year:

	Startup Period	Year 1	Year 2	Year 3
Projected Full Enrollment:		200	350	425.00
# Students Budget Based On:		180	315	382.50
Total Revenue:	300,000.00	1,438,634.00	2,104,767.33	2,517,294.00
Total Expenditures:	196,599.38	1,235,553.67	1,911,070.00	2,347,996.78
Ending Balance:	103,400.62	203,080.33	193,697.33	169,297.22

Business Plan Findings

	Preliminary TRP Scores		Revised TRP Scores	
Business Plan Score ≥ 95% Meet standard?	No	26 of 30	Yes	30 of 30
Number of "Falls Below" ratings	0		0	
Number of "Approaches" ratings	4		0	

Analysis of Business Plan

The business plan meets the criteria for approval because the facilities plan is detailed and presents multiple options located within the target area, the advertising and promotion plan is detailed and shows a thorough understanding of the target population, and the plan's start-up and three-year operational budgets are conservative and include surplus funds for contingencies.

Synergy Public School includes detailed information on all three proposed facility sites and the plan includes details clarifying that each potential site has been discussed with both Synergy's broker and each facility's owner (Business Plan C.1, Facilities Acquisition Narrative, p. 3). Projected facility expenses include insurance, utilities, permitting, and improvement costs (Business Plan C.1, Facilities Acquisition Narrative, p. 2). For each site, Synergy plans to only lease a portion of a facility, leaving sufficient room to expand to full capacity without major construction costs. The inclusion of detailed site maps, photographs, and technical details demonstrates the group's capacity to do detailed research and to organize and manage a large, complex project (Business Plan C.1, Facilities Acquisition Narrative, pp. 5-8).

As with other sections of the business plan, the advertising and promotion plan is highly detailed and aligns action steps to budget expenditures, assigns appropriate responsible parties, and provides a detailed narrative. Advertising and promotional costs are also included for Years 2 and 3 and include both direct and associated costs (Business Plan C.2, p. 10). This high level of detail demonstrates Synergy's ability to think through each required action and its impact on other sections of the plan.

The review team was also recognized the inclusion of an advertising strategy plan tailored for the target population (Business Plan C.2, p. 2). This plan includes 10 talking points staff can use when discussing Synergy with potential parents, students, and stakeholders. These talking points reiterate the school's philosophy, supports, unique features, and instructional strategies, but speak directly to the concerns of the target population in a way that underscores the Synergy's long history of working with the parents and students in the target area.

Synergy has created a budget that aligns with other sections of the application package and is conservative in its approach. Synergy's decision to hold a portion of their start-up funds in reserve as a hedge against possible delay in equalization pay for August of 2017 is clear evidence of their experience and their ability to budget strategically and build the school's capacity to weather financial fluctuations (Business Plan C.4, Startup Budget Narrative, p. 7). Similarly, Synergy's decision to budget revenue at 90% of full enrollment for each of their first three years is evidence of their ability to plan for contingencies.

EVIDENCE OF CAPACITY

Applicant Summary

The table below describes the participation of Synergy in the In-Person Interview:

Name	Role	Attended Interview?
Lori Weiss	Charter Principal, Executive Director – Co-Founder	Yes
Melissa McKinsey	Charter Principal, Executive Director – Co-Founder	Yes
Sandra Kennedy	Charter Principal, Board Member	Yes

Analysis of Applicant Capacity

The TRP finds that Synergy has the range of knowledge, skills, and experience needed to open and operate a high-quality school because the application package is detailed and well-written, and all three principle team members have decades of relevant experience working with the target population. They also demonstrated deep knowledge of and commitment to their plan, as well as effective and collaborative leadership skills during the capacity interview.

All sections of the application package are well-written, contain detail, and demonstrate Synergy's capacity to plan and execute a large, complex project. The Applicant's name "Synergy" is infused in the school's approach, which seeks to combine academic rigor and substantive social and emotional supports for underserved children. It is also infused in the leadership model, which is driven by the deep partnership between two highly-capable individuals with different, but overlapping, interests and skill-sets. Synergy's approach to application package construction is also synergistic, as each section is linked to other application package sections in a way that demonstrates understanding of the importance of linking assessment to rigor, teaching to data gathering and analysis, marketing to an understanding of the target population, and instructional plan to budget and operations.

Synergy's team has decades of combined experience working as classroom teachers and as principals with underserved students in Phoenix. In addition, the proposed Executive Director of Management and Operations, Lori Weiss, has worked as a district-level administrator guiding leadership development, and as a Success for All facilitator, increasing the likelihood of the successful implementation of this intervention-based reading program at Synergy. The proposed Executive Director of Academics, Melissa McKinsey, has trained on teacher coaching and Love and Logic, one of the school's planned support programs, and has served as a collaborative peer teacher and literacy coach. Each of these experiences aligns with Synergy's program elements. Sandra Kennedy, proposed Synergy Board Member, has worked as a teacher mentor and an intervention specialist, and has received numerous awards and grants for her work with students sharing similar gaps with the target population.

Synergy's team members were engaged and knowledgeable during the capacity interview and were comfortable discussing all parts of the application. The TRP entered into the interview with concerns about Synergy's ability to share leadership so completely, but these concerns were allayed by strong evidence that the team's sensibilities and focus are so aligned, and focused on students, that they will resolve any challenges that might arise.

BOARD OPTIONS

Option 1: The Board may approve the application package. Staff recommends the following language for consideration: Based upon review of the contents of the portfolio provided for Synergy Public School and the information provided by the representatives of the Synergy Public School during consideration, and given it is within the sole discretion of the Board to approve or deny a charter, I move to approve the application package and grant a charter to Synergy Public School to establish Synergy Public School charter school to serve grades Kindergarten through 5.

Option 2: The Board may deny the application package. The following language is provided for consideration: Based upon a review of the contents of the portfolio provided for Synergy Public School and the information provided by the representatives of Synergy Public School during consideration, and given it is within the sole discretion of the Board to approve or deny a charter, I move to reject the application package and deny the request for a charter of Synergy Public School to establish a charter school for the reason(s) that:

- ❑ The Applicant is not sufficiently qualified to operate a charter school based on (insert the facts that form the basis for determination [i.e.; background/fingerprint/credit report of the specific Officers, Members, Directors, or Partners]).
- ❑ The Applicant is not sufficiently qualified to operate a charter school based on the (insert the facts from the financial, operational and/or academic performance of associated schools that form the basis for the decision).