

APPENDIX A

AMENDMENT REQUEST AND SUPPORT

MATERIALS

1. ENROLLMENT CAP AMENDMENT REQUEST FORM
2. AMENDMENT REQUEST DOCUMENTS

Enrollment Cap Request

Charterholder Info

Charter Holder

Name:
Morrison Education Group, Inc.

CTDS:
07-85-56-000

Mailing Address:
5806 S. 35th Ave.
Bldg E
Phoenix, AZ 85041
> [View detailed info](#)

Representative

Name:
Tanae Morrison

Phone Number:
520-807-9668

Downloads

 [Download all files](#)

Enrollment Cap

From:
275

To:
850

Attachments

Board Minutes

 [Download File — Board Minutes](#)

Increase to Enrollment Cap Attachments

The following 2 attachments are only required if the enrollment cap is increasing.

Occupancy Documentation (Increase Only)

 [Download File — C of O 1 of 2](#)

 [Download File — C of O 2 of 2](#)

Narrative —  [Download File](#)

Additional Information

 [Download File — Enrollment Matrix](#)

 [Download File — Staffing Chart](#)

Signature

Charter Representative Signature
Tanae Morrison 11/03/2017

Morrison Education Group, Inc.
Sun Valley Charter School
Enrollment Cap Amendment Request
Narrative

Rationale

Sun Valley was opened in 2009 in the Laveen/South Mountain community. Sun Valley maintains a unique commitment to high expectation academics along with conservative classroom sizes. Over the last nine years Sun Valley has attracted families of diverse socioeconomic, academic and ethnic backgrounds and has maintained its commitment, its mission and students.

During this time Sun Valley grew in accordance with initial projections reaching the maximum allocated enrollment capacity. Over the last several years parent and community interest has continued to grow. This is as a result of Sun Valley investing in the Laveen community by participating in local events, sponsorships and relationship building with entities such as Wal-Mart, the City of Phoenix Library, The Kroc Center and other local businesses.

Sun Valley has experienced a growing level of parent interest relative to enrollment over the last several years, but due to the enrollment capacity limit has been unable to meet the enrollment demand. There were enrollment periods where Sun Valley carried as many as 50 students beyond enrollment capacity with no state equalization funds for those students. However, the governing body realized a growing trend that would not result in sustainability for Sun Valley. Therefore, over the last two years capacity numbers have been more strictly monitored while the demand for the program continues to grow.

Sun Valley has been over 100% of its allocated ADM for the last several years along with increased waiting lists and growing community interest. (Please refer to Attachment 1A and 1B for past and present enrollment and waitlist information). It is important to note that the waitlist does not reflect the full measure of parental interest. Because of the unlikely nature of being able to enroll students given the capacity limitation, parents were provided with information regarding the probability of being contacted for enrollment given the number of interested families. Some families elected not to be placed on the waitlist and are therefore not reflected in the waitlist numbers.

It is also important to note that the waitlist and enrollment interest does not reflect any significant marketing efforts. Because of the capacity restriction, the enrollment interest has been generated primarily by word of mouth. Sun Valley is confident that with strategic marketing plans including an Each One Reach One Initiative, that Sun Valley is sure to meet the proposed enrollment increase in year one of the capacity increase. Thereafter a more modest enrollment increase is planned to allow Sun Valley to maintain its strong academic program momentum.

Sun Valley has been making expansion plans for the last three years. This planning time has been used to refine the academic intensity, strengthen school culture and build business partnerships in the community. Sun Valley now has the opportunity to expand its reach and deliver this high quality educational program to more of the students and families who seek the opportunity to enroll. Sun Valley has consistently met the operational and financial measures and is pleased with the growing academic success of the program, which is evidenced in the most recent academic performance letter grade of a B received by the Arizona Department of Education. This places Sun Valley among the top performing schools in the Laveen/South Mountain area. The enrollment capacity increase will ensure the sustainability necessary for long-term success for the students of Sun Valley.

Staffing Plan

Sun Valley has developed an attainable Staffing Plan factoring in staff growth consistent with the anticipated student growth.

Instructional

In the first year of capacity increase Sun Valley will allow existing classrooms to reach their individual capacity resulting in a total classroom teacher increase of only eight teachers and 2.5 instructional staff in the first year, four teachers and one instructional staff in year two, and six teachers and one instructional staff in year three. These instructional staffing needs are very achievable in the current educational climate.

Recruitment, Hiring and Training

Sun Valley will use a variety of marketing outlets to attract high quality instructional staff including ADE, School Spring, social media outlets, a referral program, school website, and other job recruiting sources. Sun Valley has an established hiring protocol that involves a panel of interviewers germane to the position applied for, proper application and background check procedures, orientation and training, and a probation period for all new hires. The instructional staff is given mentors for the first one to two years of employment. Instructional staff participate in weekly professional development, weekly instructional planning with administration and weekly classroom observation and support.

During orientation and training all instructional staff participate in activities to understand the population Sun Valley serves, key stakeholders and business partners, and a time establishing shared philosophy and support for the mission of Sun Valley. These intentional measures help protect the established culture and climate of Sun Valley.

Non-Instructional

Because Sun Valley has been planning expansion for the last several years, a solid non-instructional team is in place that is prepared to handle the growth experienced in year one, therefore only one additional staff member is needed. In year two 2.5 staff members will be added and one additional staff member will be added in year three.

Recruitment, Hiring and Training

Sun Valley will use a variety of marketing outlets to attract high quality non-instructional staff including the school website, staff referrals, social media and other job recruiting outlets. Sun Valley has an established hiring protocol that involves a panel of interviewers germane to the position applied for, proper application and background check procedures, orientation and training, and a probation period for all new hires. Sun Valley also believes in “growing their own” so employment openings are shared with enrolled families to support those who have educational aspirations.

During orientation and training all instructional staff participate in activities to understand the population Sun Valley serves, key stakeholders and business partners, and a time establishing shared philosophy and support for the mission of Sun Valley. These intentional measures help protect the established culture and climate.

Administrative

Sun Valley has an administrative team well able to accommodate the expected growth in year one. Intentional planning has administrative oversight in instruction, student services, school operations and state accountabilities and finance. An additional administrator will be hired in year two and again in year three in accordance to the growth of both students and staff populations. This may include identifying administration oversight in the K-5 and Middle School areas.

Recruitment, Hiring and Training

Sun Valley will use a variety of marketing outlets to attract high quality administrative staff including ADE, School Spring, social media outlets, school website, and other job recruiting sources. Sun Valley has an established hiring protocol that involves a panel of interviewers germane to the position applied for, proper application and background check procedures, orientation and training, and a probation period for all new hires.

During orientation and training administrators will participate in an administration retreat where they will spend time with school leadership to thoroughly define operational duties, shared vision in support of the mission of Sun Valley, and activities to understand the population Sun Valley serves. Administrators will also

meet and establish relationships with key stakeholders and business partners. These intentional measures will help protect the established culture and climate of Sun Valley.

Enrollment Justification

Sun Valley has created an attainable Enrollment Matrix based on parent interest and low attrition rates. Sun Valley believes it meets all eligibility requirements for an enrollment capacity amendment request and has created a strategic plan to meet enrollment targets over the next three years.

Plan for Meeting Each Years Enrollment Targets

Sun Valley plans to meet each year's enrollment targets through a strategic marketing plan, a referral initiative, appropriate staffing with qualified individuals, and the continued strengthening of existing parent/student relationships to ensure retention of the current student base.

One of the most notable characteristics of Sun Valley is its commitment to relationships and a positive school culture. The enrollment plan includes a strategic school culture and climate component essential to protect the strong academic and behavior expectations adhered to by students. The Director of Student Services and the Director of School Operations both play key roles in this effort.

Sun Valley is a Leader In Me School and an active Lighthouse team will be in place to help incoming parents quickly learn the school leadership culture, support the vision of Sun Valley, and reinforce school expectations at home. These are elements the leadership of Sun Valley feels are essential to meeting enrollment targets. Sun Valley realizes the parent interest already exists, but is determined to make sure that the school grows in a balanced manner academically and in school culture while continuing its commitment to training scholars and leaders.

Necessary Advertising and/or Promotion

Sun Valley has been gathering enrollment momentum in the Laveen area through relationships with enrolled families and local community members. Parents have regularly shared the desire of their friends and family to enroll, but capacity limits made this challenging. Because of this growing interest Sun Valley will employ an Each One Reach One Initiative among the existing enrolled families to share their experience with Sun Valley with a friend, family member or associate letting them know that space will be more readily available.

Sun Valley will create a media presentation that will be aired on television, radio and used on social media outlets such as Facebook, Instagram, Twitter, and the school website. Bulk mailers will be sent to families within a three to five mile radius. Because of the relationships established with local businesses such as Scooptacular, ATA Martial

Arts, etc. Sun Valley will also seek access to promote through the company's established client base with an enrollment event hosted on their premises and local meet and greets at the school site.

Number of Returning Students

Even though Sun Valley is a private transportation school, it is pleased to see a declining attrition rate over the last several years. The average attrition rate was once 12.5% with the highest rate during the opening of a nearby school. However, it quickly returned to the average the following year. Some of the small number of families who transferred their students decided to return because they found Sun Valley's academic program and warm environment more conducive for their children. Based on exit surveys given, withdrawals are typically due to family relocation. The attrition rate was 8% in the 2017-18 school year. Therefore, given this declining trend expected returning student numbers would be 556, 665, and 807 for the three years after capacity increase based on a 5% attrition rate.

Anticipated New Student Enrollment

Based on enrollment trends, waitlist numbers, continued parental interest and the strategic enrollment plan, Sun Valley predicts the greatest enrollment increase in year one of the capacity increase. This will be due to momentum gained through strategic planning over the last several years, enhanced facility offering, and the current B letter grade recently received placing Sun Valley among the top educational institutions in the Laveen/South Mountain area. The expected student growth will be 290, 115 and 150 during the three years after the capacity increase.

Resources

Sun Valley has refined its curriculum, assessment and instruction over the last three years and no major adjustments are anticipated given the school is seeing the academic gains desired. New hired staff members will be trained in the existing curriculum, assessment and instructional methods employed by Sun Valley.

Curriculum

Sun Valley utilizes the Beyond Textbooks pacing guide and online database for its academic program, which includes unwrapped documents, objectives in student friendly language and instructional aids. Additionally, Spalding is used in grades K-5. Other curricular resources include Voyager, Accelerated Reader, IXL, Six-Minute Fluency, Daily Math Skills, and Leader In Me.

Assessment

Weekly or bi-weekly formatives are given to assess student mastery. A school-wide reteach and enrich block occurs daily to ensure students have additional opportunities to

master standards. Galileo is utilized each quarter to assess student performance. Students not making sufficient progress may attend before and after-school tutoring and intersession intervention program where intensive and more individualized academic instruction occurs. These students also have additional academic resources such as IXL that are utilized at home.

All formative data is reviewed weekly with teachers and instructional coaches. This data is also shared weekly from the instructional coaches to administration. This ensures a constant of awareness of school-wide academic performance.

Instruction

Sun Valley utilizes a Professional Learning Community (PLC) structure. The Director of Curriculum and Instruction received intensive PLC training. Guiding Coalition members will attend a two-day PLC training this school year. All teachers have weekly Data Driven Instructional planning with instructional coaches in English Language Arts and Math. These meetings review previous formative data, look at the next standard, the weekly unwrapped document and expected academic outcomes. The teachers and coaches develop lesson plans that address the proper depth of knowledge required for mastery. Teachers have weekly observations as well as weekly support meetings with instructional coaches to develop strong instructional practices and problem solve any student learning challenges.

Sun Valley noticed a particular need for increased instructional support in Math. Therefore a contracted Professional Development service provider was hired for the 2017-2018 school year to guide monthly math lesson studies, instructional modeling, planning, and instructional coaching for all K-8 teachers. This includes a review of pacing guides, instructional strategies and securing additional resources to increase teacher proficiency in Math instruction. This strengthened instructional rigor and structure will ensure that new teachers hired will come into a well functioning instructional structure. This is over and above the school data driven instructional planning that occurs within the school each week.

Given the efficiency of the existing curriculum, instruction, and assessment structure and resources in place, Sun Valley is not in need of any additional resources to implement the request for an enrollment capacity amendment request.

Attachments

Attachment 1A

Sun Valley Charter School			
Previous Enrollment & Waitlist Totals			
40th Day	FY 15	FY 16	FY 17
Kindergarten	46	48	48
1st Grade	46	43	35
2nd Grade	56	48	36
3rd Grade	31	47	41
4th Grade	42	30	42
5th Grade	40	40	27
6th Grade	23	39	34
7th Grade	32	19	27
8th Grade	18	18	13
Enrollment Total	334	332	303
Waitlist	71	83	67

Attachment 1B

Sun Valley Charter School		
Current Enrollment & Waitlist Totals		
40th Day	FY 18	Waitlist
Kindergarten	40	19
1st Grade	41	11
2nd Grade	33	15
3rd Grade	33	13
4th Grade	39	9
5th Grade	43	12
6th Grade	24	11
7th Grade	22	2
8th Grade	20	9
TOTAL	295	101



Arizona State Board for Charter Schools

Enrollment Matrix

Complete the table to provide the current and target enrollment, indicating the proposed timeline for implementing the request.

Directions*:

- In each box under the “Number of Students” columns, identify the number of students served per grade for the current and upcoming three fiscal years.
- In the “Total Enrollment” row, provide the total enrollment for each fiscal year.
- Copy and paste the chart for each school operated by the Charter Holder.

School Name: Sun Valley Charter School				
Grade Level	Number of Students			
	Current—FY18	Target—FY19	Target—FY20	Target—FY21
Kindergarten	40	85	100	100
1 st	41	50	100	100
2 nd	33	75	75	100
3 rd	33	75	75	100
4 th	39	75	75	100
5 th	43	75	75	100
6 th	24	50	75	80
7 th	22	50	75	85
8 th	20	50	50	85
9 th				
10 th				
11 th				
12 th				
Total Enrollment	295	585	700	850

*To view an example of a completed enrollment matrix, review page 10 of The Guide to Amending a Charter.



Arizona State Board for Charter Schools

Staffing Chart

Complete the table to provide the current and anticipated staffing for the school(s) operated by the Charter Holder. Include staff members needed if the request is granted.

Directions*:

- In each box under the “Number of Staff Members” columns, identify the number of staff members for each position/category for the current and upcoming three fiscal years.
- Copy and paste the chart for each school operated by the Charter Holder.

School Name: Sun Valley Charter School				
Position	Number of Staff Members			
	Current— FY 18	Anticipated— FY 19	Anticipated— FY 20	Anticipated— FY 21
Administration	4	4	5	6
Teachers/Instructional Staff				
Kindergarten	2	4	4	4
1 st	2	2	4	4
2 nd	2	3	3	4
3 rd	2	3	3	4
4 th	2	3	3	4
5 th	2	3	3	4
6 th	1	2	3	4
7 th	2	2	3	3
8 th	1	2	2	3
9 th	0	0	0	0
10 th	0	0	0	0
11 th	0	0	0	0
12 th	0	0	0	0
Specialty Staff (Music, Art, PE, etc.)	3	3	3	3
Special Education	1	1.5	1.5	1.5
Paraprofessional	2	4	5	6
Additional Staff				
List title: Instructional Coach	1	1	2	2
List title: Office Staff	3	3	3	4
List title: Lunch Staff	3	4	5	5
List title: ELL Coordinator	.5	.5	1	1
Total Number of Staff Members	33.5	45	53.5	62.5

*To view an example of a completed staffing chart, review page 14 of The Guide to Amending a Charter.

Leadership Staffing Chart

Complete the table below to provide current and anticipated leadership for the school(s) operated by the Charter Holder.

Directions:

- In the “Title” column, list the title of each leadership position at the school. Consider all individuals who are part of the leadership team (e.g. principal, instructional coach, lead teacher, etc.).
- In the “Current” and “Anticipated” columns, list the **names** of the individuals that will hold each of the leadership positions during the current and upcoming three fiscal years. If an existing staff member will not hold the position in the projected year, write “New Hire” or “TBD” (to be determined) in the box for that position.
- Copy and paste the chart for each school operated by the Charter Holder.

School Name: Sun Valley Charter School				
Title	Leadership Team			
	Current—FY 18	Anticipated—FY 19	Anticipated—FY 20	Anticipated—FY 21
Executive Director	Dr. Tanae Morrison	Dr. Tanae Morrison	Dr. Tanae Morrison	Dr. Tanae Morrison
Director of School Operations	Dr. James Davis	Dr. James Davis	Dr. James Davis	Dr. James Davis
Director of Student Services	Ms. Amy Austin	Ms. Amy Austin	Ms. Amy Austin	Ms. Amy Austin
Director of C & I	Dr. Vanessa Bennett	Dr. Vanessa Bennett	Dr. Vanessa Bennett	Dr. Vanessa Bennett
Instructional Coach	Mrs. Tammye Keegan	Mrs. Tammye Keegan	Mrs. Tammye Keegan	Mrs. Tammye Keegan
Instructional Coach		TBD	TBD	TBD
K-3 rd Grade Lead	Mrs. Ebony Frey	Mrs. Ebony Frey	Mrs. Ebony Frey	Mrs. Ebony Frey
4 th -5 th Grade Lead	Mrs. Nubia Ruiz	Mrs. Nubia Ruiz	Mrs. Nubia Ruiz	Mrs. Nubia Ruiz
6 th -8 th Grade Lead	Dr. Marshall Morris	Dr. Marshall Morris	Dr. Marshall Morris	Dr. Marshall Morris