

AGENDA ITEM EXECUTIVE SUMMARY: Application for New Charter

Request

Somerset Academy Arizona, Inc. ("Applicant") submitted a new charter application package on June 19, 2019. The Technical Review Panel ("TRP") evaluated the application package and determined that the revised application package does not meet the minimum scoring requirements set by the Board for the 2020-2021 application cycle. The Applicant has requested that the revised application package not meeting the scoring criteria move forward for Board consideration.

The Applicant also attended a capacity interview conducted by the TRP. Upon consideration of the application package and results of the capacity interview, the TRP recommends that the revised application package for the Applicant be denied.

Applicant Summary

Proposed School Name	Target Start Date	School Location	Grade Levels	School Calendar
Somerset Academy of the West Valley	August 3, 2020	Glendale	K-5	180 days

Mission Statement

Somerset Academy of the West Valley promotes a transformational culture that maximizes student achievement and the development of accountable, global learners in a safe and enriching environment that fosters high-quality education.

Target Population

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

The Applicant plans to serve students in the city of Glendale, Arizona, within a five-mile radius of 83rd Avenue and Glendale Avenue. This area is roughly from 59th Avenue to El Mirage Road and Thunderbird Road to I-10. The Applicant anticipates a student population with "70% of the projected student population being Hispanic/Latino and 81% qualifying for Free/Reduced Lunch (FRL) services." The Applicant states that "Based on 2018 AzMERIT results, less than half of our target population is proficient in any subject area."

Three Year Plan

	Year 1	Year 2	Year 3
Grade Levels	K-3	K-4	K-5
Enrollment	264	374	506

If approved, the Applicant's overall enrollment cap for year four and beyond would be 600.

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

The Applicant does not have a confirmed facility, but it intends to operate near the southwest corner of 83rd Avenue and Glendale Avenue.

Program of Instruction

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

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

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

See Charter Principal Resumes in Appendix B.

TRP Recommendation and Scoring

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

Overall Scoring Results

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

		Percent Meets		Percent Meets
Educational Plan Score ≥ 95% Meet standard?	No	45.52%	No	68.71%
Operational Plan Score ≥ 95% Meet standard?	No	67.09%	No	89.74%
Business Plan Score ≥ 95% Meet standard?	No	62.28/%	No	86.79%

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

The Applicant’s capacity interview was conducted on October 22, 2019. After the in-person interview, the TRP’s recommendation is to **deny** the application package.

Details related to the capacity interview are provided in Appendix A. Recommendation Report.

Applicant Background Summary

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

Principal Name: Ana Diaz

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

Past Affiliation(s) of Note:

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

Principal Name: Todd German

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

Past Affiliation(s) of Note:

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



Principal Name: Lourdes Isla-Marrero

Current Affiliation(s): One year as Dean of Bachelors Program in Elementary Education at Doral College (Miami, FL)

Past Affiliation(s) of Note:

- Twelve years as Principal at Mater Gardens Academy Charter School (Miami, FL)
- Three years as a Teacher and Four years as Assistant Principal with Mater East Academy (Miami, FL)

Principal Name: Taylor Smith

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

Past Affiliation(s) of Note:

- Served on Florida's founding Charter School Review Panel

