

**APPENDIX A**

**AMENDMENT REQUEST AND SUPPORT**

**MATERIALS**

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



## Enrollment Cap Request

### Charterholder Info

#### Charter Holder Representative

**Name:**  
BASIS Charter Schools, Inc.  
**CTDS:**  
10-84-04-000

**Name:**  
Anastasia Hawkins  
**Phone Number:**  
480-767-7696

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Scottsdale, AZ 85258  
[View detailed info](#)

### Downloads

[Download all files](#)

### Enrollment Cap

**From:**  
810  
**To:**  
823

### Attachments

#### Board Minutes

[Download File — Resolution approving Enrollment Cap Increase](#)

### Increase to Enrollment Cap Attachments

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

#### Occupancy Documentation (Increase Only)

- [Download File — Certificate of Occupancy](#)
- [Download File — Fire Marshal Inspection Report](#)

#### Narrative — [Download File](#)

#### Additional Information

- [Download File — Staffing Chart](#)
- [Download File — Financial Performance Response](#)
- [Download File — Enrollment Matrix](#)

### Feedback

Feedback

### Signature

Charter Representative Signature  
Anastasia Hawkins 03/12/2019

# **BASIS Oro Valley Primary Enrollment Cap Notification Request**

## Narrative

BASIS Charter Schools, Inc. requests approval to increase the BASIS Oro Valley Primary enrollment cap for the 2019-20 school year from 783 to serve 823 students. Enrollment as of October 1, 2018 can be found below.

| <b>Grade</b> | <b>Enrollment</b> |
|--------------|-------------------|
| KG           | 126               |
| 1            | 128               |
| 2            | 128               |
| 3            | 126               |
| 4            | 133               |
| 5            | 130               |
| <b>Total</b> | <b>771</b>        |

### **Rationale**

Beginning with the 2014-2015 school year, BASIS Oro Valley Primary began serving students at a newly constructed school facility located at 11129 N. Oracle road Oro Valley, AZ. With the original BASIS Oro Valley building sharing the same the new campus opened to serve grades K-5 to give students the opportunity to pursue a BASIS charter schools education from kindergarten through 12<sup>th</sup> grade between BASIS Oro Valley Primary and BASIS Oro Valley. For the 2018-2019 school year, BASIS Oro Valley Primary serves students in grades K-5. BASIS Oro Valley Primary currently has 771 students enrolled. The BASIS charter schools continued academic success including three Top Five rankings by U.S. News World and Reports, led to an increased demand for BASIS Oro Valley Primary.

BASIS Oro Valley Primary has received an overwhelming amount of interest in new student enrollment which resulted in applications that far exceeded the capacity for students in each grade level during open enrollment and throughout the school year in its inaugural academic year. This demand also resulted in a wait list for each grade level, which has been consistent since the school's inception.

BASIS Oro Valley Primary continues to demonstrate outstanding demand in southern Arizona and experiences high demand every year. Boasting one of the highest retention rates in the entire BASIS Charter Schools network, BASIS Oro Valley Primary maintains a waitlist that is never fully exhausted every academic year. This enrollment cap increase would allow more students to be enrolled or added for the few opens spots and also allow an additional section of 5<sup>th</sup> grade. This added section of 5<sup>th</sup> grade will provide an additional 33 seats and also meet the demonstrated demand for the Oro Valley community.

### **Staffing Plan**

The Staffing Chart, attached to this request, reflects the BASIS Oro Valley Primary staffing model as currently conceived. Part of the BASIS philosophy is to constantly evaluate and adapt where

needed. While this model is a starting point, we will be reviewing it regularly to ensure it meets the needs of the school, and we will adjust where needed.

All BASIS curriculum schools follow the same staffing model, with flexibility for individual schools to make adjustments as required by their unique student population. The staffing model varies by maturity of the school, total student population, and grade bands served. BASIS Charter Schools, Inc. maintains a vast operational capacity to open and operate schools. The relationship of the schools' Education Management Organization (EMO) with BASIS.ed is, in fact, designed specifically for this purpose. This arrangement allows the standardized BASIS.ed curriculum, staffing structure, financing platform, and facilities arrangements to be deployed to any new school; these are maintained smoothly and efficiently at existing schools. BASIS.ed can hire additional staff in these areas when the need for such staff becomes apparent. BASIS.ed has also built an extensive Data and Analytics department to track the academic progress of each school and each teacher. Trends in performance are addressed promptly: support is offered where needed and best practices can be shared across the network with minimal delay.

BASIS Oro Valley Primary conducts wide searches for suitable teaching candidates both inside and outside the traditional education pipeline by BASIS.ed. BASIS teachers, employees who work outside of our classrooms and the entire BASIS community – including parents and other school supporters – are always on the lookout for smart people with the potential to be great instructors. This is how we have recruited successful, beloved BASIS teachers from across the nation, and even worldwide. In addition, the excellent reputation of BASIS charter schools in professional education circles consistently brings top candidates to our community.

As BASIS Oro Valley Primary expands its student population, it will maintain its focus on recruiting and training the best and brightest in the field. This will require that teachers not only meet our criteria for excellence but also meet Arizona's teacher qualification standards as outlined in the Every Student Succeeds Act (ESSA) as well as guidance and requirements provided by the Arizona Department of Education regarding teacher qualifications.

All new teachers and staff at BASIS charter schools attend Summer Institute in July. This weeklong event steeps teachers in the BASIS culture of achievement, helps new employees understand their roles in the greater context of the network, and connects them with specific mentors and peers of their subject/role. It establishes a wide support system for all new hires, and is a necessary period of training prior to their week of on-site professional development. Throughout the year, there are additional trainings offered both on-site and digitally, on topics such as effective question-writing workshops, debriefs of assessment data, collaboration and planning events, and updates/trainings on the software and databases we use. Employees hired during the year are provided with a wealth of resources in our SharePoint repository, as well as dedicated advisors for their position. Our goal in such a comprehensive training process is for new hires to believe immediately that they are an important part of the wider BASIS community, and an integral component of our students' success.

As indicated in the staffing chart, there will not be a significant increased need for staff if this request is approved. BASIS Oro Valley Primary is currently serving grades K-5 and has proven it has successfully planned and appropriated resources to ensure sufficient staffing for the small student increase in each grade. The anticipated increase in staffing to accommodate this request is consistent with previous section additions at other BASIS charter schools and we are confident in our hiring and staffing practices.

Once hired, new BASIS teachers will have a plethora of resources at their disposal. Saxon publishing materials, along with connectivity to a network of over 25 schools will provide any new teachers with an array of materials as they join BASIS Curriculum Schools. Additionally, all new teachers will undergo a rigorous training in which they will meet and confer with all new BASIS teachers along with returning Subject Advisers. All new BASIS teachers will also have the opportunity to discuss best practices and pedagogical philosophies with the Subject Advisers throughout the year. All BASIS Curriculum Schools' assessments will be available to teachers, of any subject or any grade level, and concrete strategies along with activities will be available through network-wide communication.

### **Justification for Enrollment Targets**

BASIS Oro Valley Primary's Enrollment Matrix outlines the anticipation of a steady growth in the amount of new students in Kindergarten through grade 5 for the next three fiscal years. BASIS Oro Valley Primary has 520 students returning for the 2019-2020 school year and anticipates new student enrollment of 271 students.

BASIS Oro Valley Primary continues to have an overwhelming amount of interest in new student enrollment, which results in applications that far exceed the capacity for students in each grade level. This demand also results in a wait list for each grade level, which has been consistent since the school's inception. Despite this interest, BASIS.ed launches a concerted marketing campaign in October and early November each year, prior to open-enrollment; this ensures that as many families in the region as possible know about the school. This marketing campaign includes online and print advertising, radio and television advertising, direct mail campaigns, flyer distribution, participation in community events, information nights with tours and a Q&A, and other methods. We also welcome direct inquiry at each campus by interested families!

Should the need for further advertising and promotion arise, the school will follow the methods outlined in its application. Thus far, our enrollment targets have been for the school's first year of operation and we plan to maintain this success annually at every BASIS charter school.

Through multiple informational sessions, multiple-faceted advertising, and current families, the need and demand for kindergarten-5<sup>th</sup> grade has been demonstrated. In addition to meeting the demonstrated demand, current staff along with current families, will continue to actively recruit and campaign for the additional students necessary for BASIS Oro Valley Primary to fulfill the desired capacity. BASIS Oro Valley Primary has realized an increase in both enrollment and retention from the previous year, due in part to the increased notoriety and success in Arizona. As previously mentioned, BASIS Oro Valley Primary experiences between 95 and 98 percent retention year over year and an increased enrollment cap would allow for more new students to attend and provide options for the students who choose to remain.

The above-mentioned efforts will successfully fill and complete enrollment for the 2019-2020 school year. In the subsequent years, 2020-2023, BASIS Oro Valley Primary will continually fill all available seats in grades K-5 through retention efforts and backfilling for any seats that are left vacant through attrition. BASIS Oro Valley Primary will rely on compiling a robust waitlist and continually filling vacant seats through enrollment and advertisement campaigns in the neighborhoods and the surrounding communities of Oro Valley Primary. Every year the kindergarten through fourth grades will be filled with one hundred and thirty two students, and

fifth grade with one hundred and sixty three students who will either be enrolled or re-enrolled. With an average of 95% retention for grades kindergarten- fifth, what seats remain vacant will be filled with new students each year. Continually filling grades kindergarten through fifth to capacity for every subsequent fiscal year will allow for natural attrition, should it occur. The yearly filling of grades kindergarten through fifth to capacity is in keeping with other BASIS campuses and has proven successful in ensuring budgeted enrollment.

### **Concrete Resources**

The academic program and instruction is identical to that taught at BASIS Oro Valley Primary for the previous academic year and consistent with the academic excellence across all BASIS Charter Schools. BASIS Oro Valley Primary will continue to utilize the same resources that have enabled the network success across all BASIS charter schools in Arizona. No changes will need to be made as the same resources will continue to be utilized and no new grades are being offered.

\*\*\*\*\*This Site Specific Change in Grades Served Notification Request will not be submitted in conjunction with any other forms which will warrant concurrent consideration.\*\*\*\*\*



# 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: BASIS Oro Valley Primary |                    |             |             |             |
|---------------------------------------|--------------------|-------------|-------------|-------------|
| Grade Level                           | Number of Students |             |             |             |
|                                       | Current—FY19       | Target—FY20 | Target—FY21 | Target—FY22 |
| Kindergarten                          | 126                | 132         | 132         | 132         |
| 1 <sup>st</sup>                       | 128                | 132         | 132         | 132         |
| 2 <sup>nd</sup>                       | 128                | 132         | 132         | 132         |
| 3 <sup>rd</sup>                       | 126                | 132         | 132         | 132         |
| 4 <sup>th</sup>                       | 133                | 132         | 132         | 132         |
| 5 <sup>th</sup>                       | 130                | 163         | 163         | 163         |
| 6 <sup>th</sup>                       |                    |             |             |             |
| 7 <sup>th</sup>                       |                    |             |             |             |
| 8 <sup>th</sup>                       |                    |             |             |             |
| 9 <sup>th</sup>                       |                    |             |             |             |
| 10 <sup>th</sup>                      |                    |             |             |             |
| 11 <sup>th</sup>                      |                    |             |             |             |
| 12 <sup>th</sup>                      |                    |             |             |             |
| <b>Total Enrollment</b>               | 771                | 823         | 823         | 823         |

\*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: BASIS Oro Valley Primary             |                         |                  |                  |                  |
|---|-------------------------|------------------|------------------|------------------|
| Position  | Number of Staff Members |                  |                  |                  |
|   | Current—FY19            | Anticipated—FY20 | Anticipated—FY21 | Anticipated—FY22 |
| Administration                                    | 10                      | 10               | 10               | 10               |
| Teachers/Instructional Staff                      |                         |                  |                  |                  |
| Kindergarten                                      | 4                       | 4                | 4                | 4                |
| 1 <sup>st</sup>                                   | 8                       | 8                | 8                | 8                |
| 2 <sup>nd</sup>                                   | 8                       | 8                | 8                | 8                |
| 3 <sup>rd</sup>                                   | 8                       | 8                | 8                | 8                |
| 4 <sup>th</sup>                                   | 8                       | 8                | 8                | 8                |
| 5 <sup>th</sup>                                   | 4                       | 5                | 5                | 5                |
| 6 <sup>th</sup>                                   |                         |                  |                  |                  |
| 7 <sup>th</sup>                                   |                         |                  |                  |                  |
| 8 <sup>th</sup>                                   |                         |                  |                  |                  |
| 9 <sup>th</sup>                                   |                         |                  |                  |                  |
| 10 <sup>th</sup>                                  |                         |                  |                  |                  |
| 11 <sup>th</sup>                                  |                         |                  |                  |                  |
| 12 <sup>th</sup>                                  |                         |                  |                  |                  |
| Specialty Staff (Music, Art, PE, etc.)            | 6                       | 6                | 6                | 6                |
| Special Education                                 | 2                       | 2                | 2                | 2                |
| Paraprofessional                                  | 4                       | 4                | 4                | 4                |
| Additional Staff                                  |                         |                  |                  |                  |
| List title:<br>Front Office Coordinator           | 1                       | 1                | 1                | 1                |
| List title:<br>Front Office Coordinator Assistant | 1                       | 1                | 1                | 1                |
| List title:<br>Registrar                          | 1                       | 1                | 1                | 1                |
| List title:<br>Health Coordinator                 | 1                       | 1                | 1                | 1                |

## Staffing Chart

|                                      |    |    |    |    |
|--------------------------------------|----|----|----|----|
| <b>Total Number of Staff Members</b> | 66 | 67 | 67 | 67 |
|--------------------------------------|----|----|----|----|

\*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: BASIS Oro Valley Primary |                 |                  |                  |                   |
|---------------------------------------|-----------------|------------------|------------------|-------------------|
| Title                                 | Leadership Team |                  |                  |                   |
|                                       | Current—FY19    | Anticipated—FY20 | Anticipated—FY21 | Anticipated—FY22d |
| Head of School                        | Eileen Finnerty | Eileen Finnerty  | Eileen Finnerty  | Eileen Finnerty   |
| Head of Operations                    | Bill Kipling    | Bill Kipling     | Bill Kipling     | Bill Kipling      |
| Special Education Coordinator         | Olivia Ruhlman  | Olivia Ruhlman   | Olivia Ruhlman   | Olivia Ruhlman    |
| Director of Academic Programs         | Beth Blackstone | Beth Blackstone  | Beth Blackstone  | Beth Blackstone   |
| Director of Student Affairs           | Jason Wright    | Jason Wright     | Jason Wright     | Jason Wright      |
| Dean of Primary Program               | Vikki Thompson  | Vikki Thompson   | Vikki Thompson   | Vikki Thompson    |
| Facilities Coordinator                | Joyce Ruiz      | Joyce Ruiz       | Joyce Ruiz       | Joyce Ruiz        |
| Dean of Primary Program (2)           | Tarah Maes      | Tarah Maes       | Tarah Maes       | Tarah Maes        |
| Auxiliary Program Coordinator         | Brooke Lindsay  | Brooke Lindsay   | Brooke Lindsay   | Brooke Lindsay    |
| Curriculum Coordinator                | Marissa Alcorta | Marissa Alcorta  | Marissa Alcorta  | Marissa Alcorta   |
|                                       |                 |                  |                  |                   |

Staffing Chart

|  |  |  |  |  |
|--|--|--|--|--|
|  |  |  |  |  |
|  |  |  |  |  |