

APPENDIX A

- 1. Recommendation Report**
- 2. Scoring Rubric**

ARIZONA STATE BOARD FOR CHARTER SCHOOLS

CHARTER SCHOOL APPLICATION RECOMMENDATION REPORT 2019

NOVEMBER 4, 2019

New Charter Application for

Copper State Academy

Submitted by

Copper State Academy

Report Summary

Recommendation: Deny					
Applicant Name:		Copper State Academy			
Proposed School Name:		Copper State Academy			
Grades Served Year 1:	9-10	Grades Served Year 2:	9-11	Grades Served Year 3:	9-12
Location:	The school site will be located in East/Central Phoenix in one of the following zip codes: 85008, 85014, 85016, or 85018				
Mission Statement:	We provide a rigorous college-prep core curriculum along with specialized business and design electives that are engaging and relevant for the 21st century workplace. Students will build a knowledge base that prepares them for life choices as post-secondary students, consumers, employees, or business owners.				

Section Scores

A substantively complete Application package meets the following scoring requirements:

- No evaluation criteria receive a score of falls below the expectations; and
- No more than one evaluation area in each section is scored as approaching; and
- 95 percent of the evaluation areas in each plan (educational, operational, business) score at the meets level.

	<u>Preliminary TRP Scores</u>		<u>Revised TRP Scores</u>	
Any falls below the expectations ratings?	No		No	
More than one evaluation area in each section scored approaches?	Yes		Yes	
		Section Score		Section Score
Educational Plan Score \geq 95%?	No	83.65%	Yes	96.46%
Operational Plan Score \geq 95%?	No	89.29%	Yes	100%
Business Plan Score \geq 95%?	No	75.47%	No	86.79%

In-Person Interview Summary

Board members Anne Ferraioli, Mark Houlden and Pamela Houlden were present at the Capacity Interview. Pamela introduced herself in the interview as responsible for putting together the Educational Plan for the Application package and introduced Anne as the Chair of Student Opportunities and Mark as the Director of Business Operations.

The TRP's issues to address in the interview were regarding course credit and graduation requirements, the daily schedule, the use of summative assessments, the budget, and the governing body. Based on the Applicant's responses as detailed below, the TRP does not feel the Application package and the capacity of the Applicant team demonstrated a viable plan to operate a charter school serving the target population.

TRP Qualitative Analysis Summary

The TRP recommends that the Application for Copper State Academy be denied because the application package did not meet the Board's criteria in the business plan and though it met the criteria in the educational plan, left concerns of the viability of the academic plan in meeting the needs of the target population.

The educational plan met the board's criteria for approval and improved in several areas between the initial submission and the revised submission. The instructional analysis section was particularly strong and presented a detailed and comprehensive plan for delivering instruction. The areas of concern identified by the TRP included the viability of the course credit and graduation requirements. The description of the target population described a high-need population that is transient and highly mobile. The TRP was concerned that the rigorous and rigid requirements for earning course credit and for graduation would present challenges for student achievement and retention. These concerns were not adequately addressed by the Applicant during the Capacity Interview.

The operational plan met the board's criteria for approval in all areas and as discussed below, was sufficiently detailed. The weakness identified by the TRP is the familial relationship between the three founding board members/school administrators and the potential conflict of continued employment of the three relatives upon approval of the charter school.

The business plan improved from the initial submission to the revised submission but did not meet the board's criteria in four areas of the revised submission. Those areas include consistency throughout the business plan, consistency in regards to revenue and the use of carryover funds and providing an adequate rationale for the budgeted enrollment. While some of these issues were technical errors, the TRP had outstanding concerns about the capacity of the Applicant to manage the business operations of a charter school.

Educational Plan

	Preliminary TRP Scores	Revised TRP Scores
Educational Plan Score \geq 95%?	No	Yes
Number of "Falls Below" ratings	0	0
Number of "Approaches" ratings	16	3

Plan Summary

The Applicant seeks to operate a small neighborhood high school that prepares students for postsecondary opportunities, entry level positions, and the opportunity to pursue business opportunities (Capacity Interview, 4:03). The proposed school plans to serve students in grades 9-12 in east Phoenix residing between Northern Avenue and Van Buren and from Central Avenue to 40th Street. The target student population was described by the Applicant as being from a low-economic status and minority background (Capacity Interview, 3:25). The school will offer a "rigorous college-prep core curriculum with specialized business and design electives that are engaging and relevant for the 21st century workplace" (Educational Philosophy, page 1). The plan describes a "structured and safe learning environment that encourages all students to be entrepreneurial."

The educational philosophy is grounded in the Applicant's established "Success Expectations" which include knowledge, collaboration, and workplace expectations. The plan emphasizes high expectations for students and teachers, stating that it is the teachers' responsibility for closing the achievement gap and communicating regularly with parents and the business community.

An Interactive Notebook will provide a portfolio of student content that will be used to assess student achievement and will be complemented by the SAT suite of assessments and use of the Education and Career Action Plan (ECAP) to track student progress. The plan identifies ELA and mathematics curriculum developed by College Board that is aligned to the state standards and the SAT suite of assessments. McGraw Hill curriculum will be used for science and social studies. The Applicant plans to use the Explicit Instruction model (I Do, We Do, You Do) complemented with Marzano's High Yield Instructional Strategies. The instructional strategies include:

1. Setting objectives and providing feedback
2. Reinforcing effort and providing recognition
3. Cooperative learning
4. Cues, questions and advance organizations
5. Nonlinguistic representations
6. Summarizing and note taking
7. Assigning homework and providing practice
8. Identifying similarities and differences
9. Generating and testing hypotheses

Copper State plans to operate with a 180-day school year on a trimester calendar to meet the needs of the target population by reducing the time a student spends in a particular class and gives the school an opportunity to intervene in the third trimester in case a student falls behind in their credits (Capacity Interview, 10:15). The Weekly Calendar demonstrates that classes will be held Monday-Friday, from 8:00am to 1:35pm and meet the instructional hours required by law.

Analysis

While the Educational Plan technically meets the criteria set by the Board, the TRP had strong concerns about the viability and implications of the academic requirements for earning course credit and graduation. The responses provided during the Capacity Interview did not resolve these concerns and the Applicant was not able to demonstrate sufficient understanding of the needs of the target population and the implications of the proposed plan.

The proposal has set minimum graduation requirement of 30 credits as compared to the state requirement of 22 credits. The Applicant stated in the Capacity Interview and in the Course Offerings and Graduation Requirements section of the Application package that students would be able to meet this requirement through the trimester schedule with 5 subjects per day compared to the traditional semester schedule with 6 subjects per day. The TRP did not deem this response adequate evidence to support the viability of this plan.

In addition to having much higher course credit requirements than the state minimum, the promotion and graduation requirements set high expectations for earning course credit. Students

must earn a final grade of at least 70% (including all coursework and final exam) and have 90% attendance. When asked to provide rationale for this requirement, the Applicant responded that anything less than a C is an indication of lack of effort by the student (Capacity Interview, 13:21).

When asked for additional clarification on whether there would be exception for the 90% attendance rate in cases where a student met or exceeded the coursework requirements, the Applicant referred to the “ECAP program” as an intervention to keep students on top of their progress toward meeting these requirements (Capacity Interview, 16:00). The ECAP is required by State Board of Education Rule R7-2-302.05 and states “schools shall develop an Education and Career Action Plan in consultation with the student, the student’s parent or guardian and the appropriate school personnel as designated by the school principal or chief administrative officer. Schools shall monitor, review and update each Education and Career Action Plan at least annually.” The ECAP is a tool to plan and track academic, postsecondary and career goals but is not itself an intervention. The TRP had outstanding concerns about the viability of the plan as it did not find sufficient rationale or evidence to support the viability of these requirements given the target population is described by the Applicant as a transient community with high mobility and consisting of refugees and students living in shelters (Capacity Interview, 28:00).

Operational Plan

	Preliminary TRP Scores	Revised TRP Scores
Operational Plan Score ≥ 95%?	No	Yes
Number of “Falls Below” ratings	0	0
Number of “Approaches” ratings	3	0

Plan Summary

There is currently a corporate board that includes three members, Pamela Houlden, Mark Houlden and Anne Ferraioli. Anne Ferraioli is the daughter of Pamela Houlden and Pamela is married to Mark Houlden. The Applicant described the corporate board as a “working board” as all three members will be employed by the school. If the charter application is approved, Pamela and Anne will resign from the board and four new members will be appointed to the corporate board that will also function as the school governing body responsible for the policy decisions of the charter. Mark will remain on the board and be employed as the Director of Business Affairs for the school. The Applicant was able to explain that as a board member, Mark will have to recuse himself from personnel discussions regarding himself and his family members that will be employed by the school (Capacity Interview, 46:00).

The Director of the school (Pamela Houlden) will report to the Board of Directors. Teachers, the Director of Business and Operations (Mark Houlden) and the Chair of Student Opportunities (Anne Ferraioli) will report to the Director. Contracted services classified staff will report to the Director of Business and Operations and the PTSO will report to the Chair of Student Opportunities.

The Applicant plans to contract services for special education, legal services, information technology, and business operations.

Analysis

The operational plan meets the criteria for approval because 100% of the criteria were deemed “meets” by the TRP. The operational plan was sufficiently detailed in all areas and improved upon three areas of the plan between the initial and revised submissions.

While the operational plan meets the criteria for approval, the TRP had unresolved concerns regarding the relation of the Applicant team/founding school administration to each other and their combined experience. While the plans identify four additional potential board members, the people identified do not have experience in school business administration.

Business Plan

	<u>Preliminary TRP Scores</u>	<u>Revised TRP Scores</u>
Business Plan Score \geq 95%?	No	No
Number of “Falls Below” ratings	0	0
Number of “Approaches” ratings	8	4

Plan Summary

Proposed Location: The school site will be located in East/Central Phoenix in one of the following zip codes: 85008, 85014, 85016, or 85018

Facilities Requirements: The facility must be able to accommodate 250 students and 15 staff by year three of operation and contain at least 15,550 square feet.

Budget Summary

	<u>Startup Period</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>
Projected Enrollment:		140	190	238
Total Revenue:	222,000	1,137,769	1,526,512	1,894,249
Total Expenditures:	195,561	1,133,574	1,361,468	1,587,731
Ending Balance:	26,439	31,010	188,393	306,518

The Applicant plans to have an 18 month start-up period to provide ample time to hire teachers and market and recruit students (Capacity Interview, 8:21). The Applicant seeks an existing educational building in the east/central Phoenix area and plans to identify the facility by September 2020 (Facilities Acquisition, Page 1).

The application requests enrollment capacity of 150, 200 and 250 students in years one, two, and three respectively and projects enrollment to grow from 93% of capacity to 95% of capacity between years one and three (REVISED Three Year Operational Budget). The budget is based on these enrollment projections.

The marketing and enrollment plan states that the school will begin a recruitment campaign upon charter approval and will advertise in English and Spanish through digital marketing platforms, community events, mail, and creative and strategic efforts in the community. The plan states that there is demand for a community neighborhood school in the target location and this was supported

by statements made in the Capacity Interview and throughout the application package.

The founding team will fill the three administrative positions at the school and will hire six FTE teachers, a receptionist, and a part-time custodian for year one of operation. The founding team will be the hiring team and determine the staffing needs and implement the recruitment plan. The founding team plans to post job listings on the school website, Arizona Education Employment Board, arizonaeducationjobs.com, and national job posting websites in addition to submitting print ads to newspapers and print media (Personnel, page 1). The team will also attend career fairs and partner with 4-year postsecondary institutions to recruit high qualified candidates.

Analysis

The business plan approaches the criteria for approval because it failed to provide adequate rationale for the budgeted enrollment and lacked consistency throughout the plan in regards to revenue and carryover funds.

The TRP recognized some of these issues were technical errors but was concerned the team did not have business or charter school operations experience. The Applicant does plan to hire a business consultant which may strengthen the business operations of the charter holder, but the lack of school business administration experience remained a concern of the TRP following the Capacity Interview.

Evidence of Capacity

Applicant Summary

Name	Role	Attended Interview?
Anne Ferraioli	Board member/ Chair of Student Opportunities	Yes
Mark Houlden	Board member/ Director of Business Operations	Yes
Pamela Houlden	Board member/ Charter Representative	Yes

Analysis

The TRP finds that the Applicant lacked the range of knowledge, skills and experience needed to open and operate a high quality school. Together the Applicant team has extensive experience in teaching in charter and district schools and has demonstrated experience in instructional leadership. This experience came across in the detailed and well written educational philosophy, instructional analysis, and Academic Systems Plan sections of the Application.

The Applicant was not able to resolve areas of concern addressed by the TRP in the application feedback and raised during the interview regarding the viability of the course credit and graduation requirements. The Applicant was able to express an understanding of and experience with the target population but was not able to identify evidence that the heightened and rigid course credit requirements would result in improved student outcomes. This disconnect caused concern about the capacity of the Applicant team to implement a viable academic program that would meet the state board's academic expectations.

Anne Ferraioli has several years of experience as a teacher. The management and operational plan identifies Anne as the Chair of Student Opportunities with an extensive list of responsibilities, including but not limited to English Learner development, student information systems, state and federal compliance, and professional development. Although the Applicant states it will contract for legal and business services, the TRP was not confident Anne had adequate experience to oversee these critical areas of responsibility listed under her position title.

Although Pamela Houlden holds a BS in Business Administration and Mark Houlden has experience in department-level budgeting at a charter school, the TRP found the lack of charter school operations and business administration to be a deficiency in the founding team and planned staffing.

Applicant:	Copper State Academy
Proposed School Name:	Copper State Academy

Requirements for Substantive

Completeness:
 No evaluation area receives a score of Falls Below the Criteria Met
 No more than one evaluation area in each section is scored as Approaches the Criteria Not Met
 95% of the evaluation areas in each Plan (Educational Plan, Operational Plan, and Business Plan) score at the "Meets" level Not Met
 The Application is Substantively Incomplete

PART A: Educational Plan (A.1-A.6)

Points for A.1-A.4: **28.0**
Points for A.5: **20.0**
Points for A.6: **9.875**
Total Score: **57.875**
Percentage: **96.46%**

PART B: Operational Plan (B.1-B.3)

Total Score: **28.0**
Percentage: **100.00%**

PART C: Business Plan (C.1-C-5)

Total Score: **46**
Percentage: **86.79%**

Total Possible Points for A.1-A.4	30
Total Possible Points for A.5	20
Total Possible Points for A.6 K-2	N/A
Total Possible Points for A.6 3-5	N/A
Total Possible Points for A.6 6-8	N/A
Total Possible Points for A.6 9-12	20
Total Possible Points for B.1-B.3	28
Total Possible Points for C.1-C.5	53

REVISED APPLICATION RATINGS

Part A	Educational Plan			
A.1	Educational Philosophy	Rating	Scoring	Technical Assistance / Comments
A.1a	Provide a clear and comprehensive overview of the school's philosophical approach, describing how students will learn and what the teacher's role in that learning will be. (2 points)	Meets	2	Meets the Criteria
A.1b	Incorporate the elements fundamental to the school's program of instruction. (2 points)	Meets	2	Meets the Criteria
A.1c	Include a mission statement that is clear, cohesive, comprehensive and has a focus on outcomes rather than inputs. (2 points)	Meets	2	Meets the Criteria
A.1d	Articulate how the school's educational philosophy is aligned with the mission statement of the proposed school. (1 point)	Meets	1	Meets the Criteria
A.1e	Present a rationale that clearly supports how the selected approach improves pupil achievement in the target population, including research and/or experience. (1 point)	Meets	1	Meets the Criteria
A.1f	Ensure the Mission Statement on the Target Population Page is consistent with the narrative.	Meets		Meets the Criteria
	A.1 Total-Falls Far Below	0	Total Score:	
	A.1 Total-Approaches	0	8	
	A.1 Total-Meets	6		
A.2	Target Population	Rating	Scoring	Technical Assistance / Comments

A.2a	Identify the target population the response should demonstrate a clear understanding of the students and community the school intends to serve, including current levels of academic performance of the surrounding schools. (2 points)	Meets	2	Meets the Criteria
A.2b	Present an explanation of how the implementation of the program of instruction described in Section A.3 meets the identified needs of the target population including improving pupil achievement and providing educational choice. (2 points)	Meets	2	Meets the Criteria
A.2c	Describe the class size and teacher-student ratios and clearly explain how these address the identified needs of the target population for improved pupil achievement and educational choice. (2 points)	Meets	2	Meets the Criteria
A.2d	Ensure the target population provided on the Target Population page in the online application wizard is consistent with the narrative in this section.	Meets		
	A.2 Total-Falls Far Below	0	Total Score:	
	A.2 Total-Approaches	0	6	
	A.2 Total-Meets	4		
A.3	Program of Instruction	Rating	Scoring	Technical Assistance / Comments
A.3a	Describe the curriculum for the core academic content areas, which clearly demonstrates alignment to the Educational Philosophy and Arizona State Standards. (2 points)	Meets	2	Meets the Criteria
A.3b	Demonstrate a clear understanding of methods of instruction key to the program of instruction, including formative assessment strategies, which clearly demonstrate alignment to the curriculum, assessments, and Educational Philosophy. (2 points)	Meets	2	Meets the Criteria

A.3c	Present a rationale for the selected curriculum, methods of instruction and assessment that support improving pupil achievement in the target population. (1 point)	Approaches	0	Addresses criteria, but lacks sufficient detail in presenting a rationale for the selected curriculum, methods of instruction, and assessment that are directly associated with the needs of the target population.
A.3d	Explain how the Program of Instruction will result in achieving the outcomes described in the school's mission. (1 point)	Meets	1	Meets the Criteria
A.3e	Ensure the Program of Instruction is consistent with the Academic Systems Plan.	Meets		Meets the Criteria
	A.3 Total-Falls Far Below	0	Total Score:	
	A.3 Total-Approaches	1	5	
	A.3 Total-Meets	4		
A.3.1	Mastery and Promotion	Rating	Scoring	Technical Assistance / Comments
A.3.1a	Present clear criteria and conditions for promotion from one level to the next, to include the level of proficiency that students must obtain to demonstrate mastery of academic core content. (1 point)	N/A		Not Applicable
A.3.1b	Describe a comprehensive viable and adequate process the school will use to determine grade level promotion and retention consistent with A.R.S. §15-701. (1 point)	N/A		Not Applicable
A.3.1c	Present a rationale for the selected criteria and conditions that guide the grade level promotion decisions. (1 point)	N/A		Not Applicable
A.3.1d	Describe the process for student retention. (1 point)	N/A		Not Applicable
A.3.1e	Ensure consistency with Area II of the Academic Systems Plan.	N/A		Not Applicable
	A.3.1 Total-Falls Far Below	0	Total Score:	

	A.3.1 Total-Approaches	0		
	A.3.1 Total-Meets	0		
A.3.2	Course Offerings and Graduation Requirements	Rating	Scoring	Technical Assistance/ Comments
A.3.2a	Identify graduation requirements for the school that will meet A.R.S. §15-701.01. (1 point)	Meets	1	Meets the Criteria
A.3.2b	Describe a comprehensive viable and adequate process that includes clear criteria and conditions for awarding course credit. (1 point)	Approaches	0	Addresses criteria, but lacks sufficient detail in describing a comprehensive, viable, and adequate process for awarding course credit. Specifically, in regards to the minimum course credit requirement for graduation, the minimum performance and attendance required for promotion, and the implications for the target population.
A.3.2c	Provide a rationale for the selected criteria and conditions for awarding course credit and how they represent student capacity to pass the end of course State assessments. (1 point)	Meets	1	Meets the Criteria
A.3.2.d	Provide a menu of course offerings which include course titles and brief descriptions of classes consistent with State requirements and that clearly demonstrate alignment to the Program of Instruction. (1 point)	Meets	1	Meets the Criteria
A.3.2.e	Ensure consistency with the program of instruction and alignment with the Business Plan as presented in the application package.	Meets		Meets the Criteria
	A.3.2 Total-Falls Far Below	0	Total Score:	
	A.3.2 Total-Approaches	1	3	
	A.3.2 Total-Meets	4		
A.4	School Calendar and Weekly Schedule	Rating		Technical Assistance / Comments

A.4a	Provide the length of the school day (approximate start and dismissal times) and how many minutes per day will be designated for each core academic subject that clearly demonstrate compliance with hours/minutes of instruction for each grade level served, for the proposed school calendar (standard or extended) pursuant to A.R.S. §15-901. (1 point)	Meets	1	Meets the Criteria
A.4b	Ensure the weekly schedule demonstrates compliance with A.R.S. §15-118 and current Move on When Reading Requirements, as defined by the Arizona Department of Education. (.5 points)	Meets	.5	Meets the Criteria
A.4c	Include a school calendar with the total number of days the proposed school will be in session, early-release days, scheduled holidays, teacher work-days/professional development, and additional days off. (.5 points)	Meets	.5	Meets the Criteria
A.4d	School calendar clearly demonstrates compliance with A.R.S. §15-341.01. (1 point)	Meets	1	Meets the Criteria
A.4e	Provide a rationale for the selected weekly schedule that clearly supports improving pupil achievement in the target population. (1 point)	Meets	1	Meets the Criteria
A.4f	Identify professional development opportunities consistent with the information provided in Area IV of the Academic Systems Plan.	Meets		Meets the Criteria
	A.4 Total-Falls Far Below	0	Total Score:	
	A.4 Total-Approaches	0	4.0	
	A.4 Total-Meets	6		
Overall Consistency of Education Plan	Consistency among all components of the Educational Plan (Sections A.1-A.6) See page 18 of the Application Instructions for more information. (2 points)	Meets	2	

Part A: Education Plan Total-Falls Far Below	0
Part A: Education Plan Total-Approaches	2
Part A: Education Plan Total-Meets	24
Education Plan A.1-A.4 Total Score	28.0

REVISED APPLICATION RATINGS				REVISED COMMENTS AND ANALYSIS	
Part A.5	Academic Systems Plan				
A.5	Academic Systems Plan	Rating	Scoring	Technical Assistance / Comments	Comments/Notes/Possible Interview Questions:
A.5a	Provide predicted target figures for Percent Passing in Mathematics and Reading aligned with target population information provided in Section A.2 (1 point)	Meets	1	Meets the Criteria	
A.5b	Provide a clear description of the basis for setting baseline figures that aligns with Section A.2. (1 point)	Meets	1	Meets the Criteria	
		Score for A.5 a and A.5 b:	2.00		
A.5 Academic System Area I: Curriculum	Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive curriculum system (Area I): The curriculum area of the ASP is worth 4 points.	Meets		Meets the Criteria in Area I	
A.5c-I(i)	Provide sufficiently detailed and implementable action steps that address: i. Adoption of curriculum aligned to Arizona State Standards; • adopting new and supplemental curriculum, • gathering curriculum options, • evaluating proposed curriculum programs and materials, and • verifying the curriculum is aligned to Arizona State Standards.	Meets	1	Meets the Action Steps	
A.5c-I(ii)	Provide sufficiently detailed and implementable action steps that address: ii. Implementation of curriculum to include; • integrating curriculum into instruction consistently, and • implementing the curriculum with fidelity to the design of the curriculum and program of instruction.	Meets	1	Meets the Action Steps	
A.5c-I(iii)	iii. Evaluation of curriculum to include; • determining if curriculum is effective based on criteria set by the school, • ensuring that the curriculum allows students to meet the standards, • verifying whether curriculum is aligned to student needs, and • identifying if a curricular gap is preventing the students from mastering a standard.	Meets	1	Meets the Action Steps	
A.5c-I(iv)	iv. Revision of curriculum to include; • making revisions to existing curriculum, and • replacing/supplementing existing curriculum through adoption of new curriculum.	Meets	.5	Meets the Action Steps	
A.5c-I(v)	v. Adaptation to address the curriculum needs of subgroup populations by; • ensuring that implemented curriculum and supplemental curriculum meet the identified needs of students in subgroups.	Meets	.5	Meets the Action Steps	
		Score for Curriculum Area:	4.00		
A.5 Academic System Area II: Assessment	Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive assessment system to assess student performance (Area II): The assessment area of the ASP is worth 4 points.	Meets		Meets the Criteria in Area II	
A.5a-II(i)	i. Developing the assessment system; • creating a data collection system that involves both formative and summative assessments, • ensuring the assessment system is aligned to the curriculum, and • the instructional methodology/program.	Meets	1	Meets the Actions Steps	

A.5a-II(ii)	<ul style="list-style-type: none"> ii. Analyzing assessment data; <ul style="list-style-type: none"> • students are performing, • whether instructional methodology and curriculum are meeting the needs of all students, and • what adjustments are made when methodology and/or curriculum are not meeting student needs. 	Meets	1	Meets the Action Steps	
A.5c-II(iii)	<ul style="list-style-type: none"> iii. Adapted to meet the needs of subgroups; <ul style="list-style-type: none"> • evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group 	Meets	1	Meets the Action Step	
A.5d-II(iv)	<ul style="list-style-type: none"> iv. Year to Year comparison; <ul style="list-style-type: none"> • determine what data will be collected to allow for valid and reliable comparisons of student growth and proficiency • determine the analysis completed during the year to allow for valid and reliable comparisons from year to year. 	Meets	1	Meets the Action Steps	
		Score for Assessment Area:	4.00		
A.5 Academic System Area III: Monitoring Instruction	Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive system for monitoring instruction (Area III): The monitoring instruction area of the ASP is worth 4 points.	Meets		Meets the Criteria in Area III	
A.5e-III(i)	<ul style="list-style-type: none"> i. Monitoring instruction; <ul style="list-style-type: none"> • gathering evidence to ensure that the classroom instruction is aligned with standards, • identifying if the instruction is taking place in the manner prescribed by curriculum planning documents, • verifying if the instruction allows students to effectively master state standards, and • ensuring that adjustments are made to the curriculum for students in 	Meets	1	Meets the Action Steps	
A.5e-III(ii)	<ul style="list-style-type: none"> ii. Evaluating instructional practices; <ul style="list-style-type: none"> • integrating curriculum into instruction consistently, and • implementing the curriculum with fidelity to the design of the curriculum and program of instruction, • gathering evidence to evaluate the effectiveness of instructional practices for all instructional staff, • using criteria to clearly measure instructional quality, and • disaggregating teacher evaluation data to identify strengths, weaknesses and needs of individual teachers. 	Meets	1	Meets the Action Steps	
A.5e-III(iii)	<ul style="list-style-type: none"> iii. Adapted to meet the needs of subgroups. <ul style="list-style-type: none"> • evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group. 	Meets	1	Meets the Action Steps	
A.5e-III(iv)	<ul style="list-style-type: none"> iv. Providing feedback that develops the quality of teaching and standards integration; <ul style="list-style-type: none"> • analyzing the information gathered in the teacher evaluation process in order to provide feedback specific to each individual staff member on their quality of teaching and standards integration. 	Meets	1	Meets the Action Steps	
		Score for Monitoring Instruction Area:	4.00		
A.5 Academic System Area IV: Professional Development	Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive professional development system (Area IV): The professional development area of the ASP is worth 3 points.	Meets		Meets the Criteria in Area IV	
A.5f-IV(i)	<ul style="list-style-type: none"> i. Developing the professional development plan; <ul style="list-style-type: none"> • determining what PD topics will be covered throughout the year and • deciding what data and analysis will be used to make those decisions. 	Meets	1	Meets the Action Steps	

A.5f-IV(ii)	ii. Supporting high quality implementation; • supporting high quality implementation of PD strategies by providing support and • allocating resources such as time, space, and the necessary material items required for implementation.	Meets	1	Meets the Action Steps	
A.5f-IV(iii)	iii. Monitoring implementation and follow-up; • monitoring that the strategies learned in professional development are implemented, and • following up with instructional staff regarding levels of implementation.	Meets	.5	Meets the Action Steps	
A.5f-IV(iv)	iv. Adapted to meet the needs of subgroups; • determining what topics are addressed during PD to meet the needs of subgroups	Meets	.5	Meets the Action Steps	
		Score for Professional Development Area:	3.00		
A.5g	Identify the frequency and/or timing sufficient for the timely completion of the action steps as part of a comprehensive system in each Area. (1 point)	Meets	1	Meets the Criteria	
A.5h	Identify concrete documentation that will serve as evidence to demonstrate implementation of all components of each action step. (1 point)	Meets	1	Meets the Criteria	
A.5i	Provide adequate personnel resources responsible for completing action steps that support the Areas. Identify the title/role/positions of the individual(s). (1 point)	Meets	1	Meets the Criteria	
A.5j	Be consistent with all sections of the application package.	Meets		Meets the Criteria	
		Score for A.5g through A.5i:	3.00		
	A.5 Total-Falls Far Below	0			
	A.5 Total-Approaches	0			
	A.5 Total-Meets	27			
		Total Score for ASP:	20.0		

REVISED APPLICATION RATINGS

REVISED APPLICATION RATINGS				
Part A.6.9-12	Instructional Analysis			
A.6.9-12	9-12 Grade Span Instructional Analysis	Rating	Scoring	Technical Assistance / Comments
A.6.9-12a	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. 1. Learning Target: Identify the objectives students must know that align with the Required Standard and can be assessed to demonstrate mastery of the Required Standard. (.5 points)			Meets the Criteria in Reading, Writing, Mathematics, and Science.
	Score for Reading	Meets	.5	
	Score for Writing	Meets	.5	
	Score for Mathematics	Meets	.5	
	Score for Science	Meets	.5	
		Total Score for A.6.9-12a	2.00	
A.6.9-12b	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. 2. Prior Knowledge: List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets. (.25 points)			Addresses the criteria, but lacks sufficient detail in listing knowledge/skills required prior to meeting learning targets for Reading.
	Score for Reading	Approaches	0	Response lists prior learning activities rather than the knowledge and skills required to meet the learning targets.
	Score for Writing	Meets	.25	
	Score for Mathematics	Meets	.25	
	Score for Science	Meets	.25	

		Total Score for A. 6.9-12b	0.75	
A.6.9-12c	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. 3. Instructional Plan: Describe the process for presenting new information, necessary for students to meet the learning targets. Describe the instructional strategies used to lead students to meet each of the learning targets identified. (1 point)			Meets the Criteria in Reading, Writing, Mathematics, and Science.
	Score for Reading	Meets	1	
	Score for Writing	Meets	1	
	Score for Mathematics	Meets	1	
	Score for Science	Meets	1	
		Total Score for A. 6.9-12c	4.00	
A.6.9-12d	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. 4. Instruction: Describe the activity/tasks students will complete to meet the learning targets. Identify components of the program of instruction and educational philosophy that are incorporated into instruction. (1 point)			Meets the Criteria in Reading, Writing, Mathematics, and Science.
	Score for Reading	Meets	1	
	Score for Writing	Meets	1	
	Score for Mathematics	Meets	1	
	Score for Science	Meets	1	
		Total Score for A. 6.9-12d	4.00	

A.6.9-12e	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. 5. Formative Assessment: List criteria for determining whether students have met each of the learning targets. (1 point)			Meets the Criteria in Reading, Writing, Mathematics, and Science.
	Score for Reading	Meets	1	
	Score for Writing	Meets	1	
	Score for Mathematics	Meets	1	
	Score for Science	Meets	1	
		Total Score for A. 6.9-12e	4.00	
A.6.9-12f	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. 6. Summative Assessment: Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard. (1 point)			Meets the Criteria in Reading, Writing, Mathematics, and Science.
	Score for Reading	Meets	1	
	Score for Writing	Meets	1	
	Score for Mathematics	Meets	1	
	Score for Science	Meets	1	
		Total Score for A. 6.9-12f	4.00	
A.6.9-12g	Provide a complete response based on the Required Standard for Reading, Writing, Mathematics, and Science. 7. Remediation: Describe the processes available to provide support to students that do not meet the learning targets. (.25 points)			Meets the Criteria in Reading, Writing, Mathematics, and Science.
	Score for Reading	Meets	.25	
	Score for Writing	Meets	.25	

	Score for Mathematics	Meets	.25	
	Score for Science	Meets	.25	
		Total Score for A. 6.9-12g	1.00	
	A.6.9-12 Total-Falls Far Below	0		
	A.6.9-12 Total-Approaches	1		
	A.6.9-12 Total-Meets	27		
		Total Score for 9-12 Instructional Analysis:	19.75	

REVISED APPLICATION RATINGS

REVISED APPLICATION RATINGS				
Part B	Operational Plan			
B.1	Applicant Entity	Rating	Scoring	Technical Assistance / Comments
B.1a	Describe in detail the Applicant's history, including its establishment, evolution, and how operating a charter school became part of its mission as documented in the minutes or resolution of intent to apply for a charter school. (2 points).	Meets	2	Meets the Criteria
B.1b	Provide a clear and cohesive organizational chart and narrative that clearly delineates the roles, responsibilities, and reporting structure for each position on the chart. (2 points)	Meets	2	Meets the Criteria
B.1c	Clearly describe any subsidiary relationship of the Applicant entity to another organization. (1 point)	Meets	1	Meets the Criteria
B.1d	Identify any current or prior charter operation by the Applicant and any Principal, including the authorizer, timeframe, and nature of involvement. (1 point)	Meets	1	Meets the Criteria
B.1e	Discuss the role of each Principal in the entity. Clearly describe the qualifications of each Principal to support the Educational Plan, Operational Plan, and/or Business Plan. (1 point)	Meets	1	Meets the Criteria
B.1f	Be consistent with the background information documents provided for each individual. (.5 points)	Meets	.5	Meets the Criteria
B.1g	Ensure consistency with legal documentation establishing entity, including number of directors required by the Bylaws. (.5 points)	Meets	.5	Meets the Criteria
B.1h	Ensure consistency with information listed on Title Page and the contents of the application package. (.5 points)	Meets	.5	Meets the Criteria
	B.1 Total-Falls Far Below	0	Total Score:	
	B.1 Total-Approaches	0	8.50	
	B.1 Total-Meets	8		
B.2	Governing Body	Rating	Scoring	Technical Assistance / Comments
B.2a	Clearly identify the specific roles and the responsibilities of the school governing body per A.R.S. §15-183 (E)(8). If applicable, describe any role the school governing body will have beyond the statutory minimum. (2 points)	Meets	2	Meets the Criteria

B.2b	Indicate if the corporate board for the Applicant will also act as the school governing body, or if and when a school governing body separate from the corporate board will be established. (2 points)	Meets	2	Meets the Criteria
B.2c	Describe how the composition of the school governing body will have the capacity to fulfill its requirements and supports the school's mission. (2 points)	Meets	2	Meets the Criteria
B.2d	Describe a clear and appropriate process for selecting initial governing body members and filling vacancies. The description should indicate a process that will result in the selection of a qualified governing body with the ability to fulfill its responsibilities. (2 points)	Meets	2	Meets the Criteria
B.2e	Be consistent with all sections of the application package. (.5 points)	Meets	.5	Meets the Criteria
	B.2 Total-Falls Far Below	0	Total Score:	
	B.2 Total-Approaches	0	8.50	
	B.2 Total-Meets	5		
B.3	Management and Operation	Rating	Scoring	Technical Assistance / Comments
B.3a	Provide an organizational chart and clearly delineate the roles and responsibilities of each position on the chart as it pertains to administering the day-to-day activities of the school. (2 points)	Meets	2	Meets the Criteria
B.3b	Present a comprehensive viable and adequate operational plan that includes oversight responsibilities related to instruction and operational services. Plan must identify the number of administrative personnel (each year for the first three years) and their oversight responsibilities related to the following areas: Instruction, Curriculum and Assessment (mandated State testing), Staff Development, Financial Management, Contracted Services, Personnel, Grants Management, and Student Information System (SIS). (2 points)	Meets	2	Meets the Criteria
B.3c	Identify critical skills or experience that will indicate the minimum qualification for fulfillment of those responsibilities. (2 points)	Meets	2	Meets the Criteria
B.3d	Be consistent with all sections of the application package. (.5 points)	Meets	.5	Meets the Criteria
	B.3 Total-Falls Far Below	0	Total Score:	

	B.3 Total-Approaches	0	6.50	
	B.3 Total-Meets	4		
B.3.1	Education Service Providers	Rating	Scoring	Technical Assistance / Comments
B.3.1a	Present a detailed explanation of how contracting with or having a governance relationship with the ESP: allows the Applicant to fulfill its mission and implement its program of instruction, and meets the identified needs of the target population including improving pupil achievement. (2 points)	N/A		Not Applicable
B.3.1b	Provide relevant performance data for other schools that the ESP has managed that demonstrates the ESP's success in implementing the program of instruction and improving pupil achievement in a comparable population. (2 points)	N/A		Not Applicable
B.3.1c	Provide a clear description of the services to be provided by the ESP consistent with the service agreement. (2 points)	N/A		Not Applicable
B.3.1d	(CMOs only) Ensure that the relationship between the ESP and Applicant entity described in the narrative is clearly consistent with the Articles of Incorporation and Bylaws in Section B.1. (.5 points)	N/A		Not Applicable
B.3.1e	(EMOs only) Provide an explanation for the reasons for contracting with an ESP, in general, and this provider in particular, and how the ESP will further the school's mission and program. (2 points)	N/A		Not Applicable
B.3.1f	EMOs only) Describe the Applicant's performance expectations for the ESP consistent with the service agreement, and a viable and adequate plan for how the Applicant will evaluate that performance. (1.5 points)	N/A		Not Applicable

B.3.1g	(EMOs only) Describe the ESP's roles and responsibilities in relation to the Applicant consistent with the service agreement. (1 point)	N/A		Not Applicable
B.3.1h	Ensure ESP-related costs are described in the Budget Assumptions and included in the Start-Up and Three-Year Operational Budget as appropriate. (.5 points)	N/A		Not Applicable
	B.3.1 Total-Falls Far Below	0		
	B.3.1 Total-Approaches	0		
	B.3.1 Total-Meets	0		
B.3.2	Contracted Services	Rating	Scoring	Technical Assistance/ Comments
B.3.2a	Delineate all areas (e.g., business management, legal, IT, special education, curriculum development/alignment, etc.), for which the Applicant plans to contract with a service provider. (1 point)	Meets	1	Meets the Criteria
B.3.2b	Identify the minimum professional qualifications and/or experience expected of those to be retained to perform each listed contracted service. (1 point)	Meets	1	Meets the Criteria
B.3.2c	Provide specific sources for costs of each listed contracted service. (1 point)	Meets	1	Meets the Criteria
B.3.2.d	Describe how the costs associated with each listed contracted service are viable and adequate for the target population identified in A.2. (1 point)	Meets	1	Meets the Criteria
B.3.2.e	Ensure costs are described in the Budget Assumptions and included in the Start-Up and Three-Year Operational Budget as appropriate. (.5 points)	Meets	.5	Meets the Criteria
	B.3.2 Total-Falls Far Below	0	Total Score:	
	B.3.2 Total-Approaches	0	4.50	
	B.3.2 Total-Meets	5		

Part B: Operational Plan Total-Falls Far Below	0
Part B: Operational Plan Total-Approaches	0
Part B: Operational Plan Total-Meets	22
Total Scoring	28.00

REVISED APPLICATION RATINGS

Part C Business Plan				
C.1	Facilities Acquisition	Rating	Scoring	Technical Assistance / Comments
C.1a	Identify a timeframe for securing an appropriate facility consistent with the Target Start Date identified on the Target Population Page. (2 points)	Meets	2	Meets the Criteria
C.1b	Identify and describe the facility necessary to implement the program. Include square footage, number of classrooms, layout of space (floor plan), and location that will accommodate the number of anticipated students and class size as identified throughout the application package. (2 points)	Meets	2	Meets the Criteria
C.1c	Ensure the Layout of Space is consistent with the narrative (.5 points)	Meets	.5	Meets the Criteria
C.1d	Ensure costs as described in the narrative accounted for in the Start-Up and Three-Year Operational Budgets and fully described in the Assumptions. (1 point)	Meets	1	Meets the Criteria
C.1e	Be consistent with all sections of the application package (.5 points)	Meets	.5	Meets the Criteria
C.1f(i)	For a planned location only: Identify and provide documentation on available facilities within the target market that will allow implementation of the program of instruction and support the student population and class size described in the application package. (2 points)	Meets	2	Meets the Criteria
C.1f(ii)	For an already acquired facility, purchased land or proposed build only: Identify costs associated with securing the facility and ensuring compliance with all applicable laws and regulations including obtaining educational occupancy. (2 points)	N/A		Not Applicable
C.1f(iii)	For an already acquired facility, purchased land or proposed build only: Describe any financial arrangements that have been made for securing the facility. (2 points)	N/A		Not Applicable

	C.1 Total-Falls Far Below	0	Total Score:	
	C.1 Total-Approaches	0	8	
	C.1 Total-Meets	6		
C.2	Marketing and Student Enrollment	Rating	Scoring	Technical Assistance / Comments
C.2a	Provide a viable and adequate time frame for recruiting students consistent with the start-up date of the proposed school identified on the Target Population Page. (1 point)	Meets	1	Meets the Criteria
C.2b	Provide a clear and comprehensive plan that is viable and adequate to support the number of students included in the Three-Year Operational Budget. (2 points)	Meets	2	Meets the Criteria
C.2c	Provide clear and specific sources for costs associated with the marketing plan. (1 point)	Meets	1	Meets the Criteria
C.2d	Describe how the costs associated with the marketing plan are viable and adequate to attract the projected student population identified in Year 1 of the Three-Year Operational Budget. (2 points)	Meets	2	Meets the Criteria
C.2e	Ensure costs as described in the narrative are accounted for in the Start-Up and Three-Year Operational Budgets and fully described in the Budget Assumptions. (1 point)	Meets	1	Meets the Criteria
C.2f	Describe the proposed fair and equitable admission requirements. List and describe all documents that will be required in the enrollment packet. (2 points)	Meets	2	Meets the Criteria
C.2g	Describe enrollment procedures that are compliant with A.R. S. §15-184, including the timeframe, process used if capacity is insufficient to enroll all students, and documentation collected for student registration once a student is admitted to the school. (1 point)	Meets	1	Meets the Criteria

C.2h	Identify the enrollment targets, including the minimum and maximum projected enrollment at each grade level that will be set, and how these targets were determined. (1 point)	Meets	1	Meets the Criteria
C.2i	Ensure all processes, procedures, and documentation used in the enrollment process are compliant with all applicable state and federal statutes, Rules, and policies. (1 point)	Meets	1	Meets the Criteria
	C.2 Total-Falls Far Below	0	Total Score:	
	C.2 Total-Approaches	0	12	
	C.2 Total-Meets	9		
C.3	Personnel	Rating	Scoring	Technical Assistance / Comments
C.3a	Provide a clear and comprehensive staffing plan, including the minimum professional qualifications and/or experience for each position. (2 points)	Meets	2	Meets the Criteria
C.3b	Describe how the staffing plan is adequate for the effective implementation of the program of instruction and operation of the charter school as described, including: <ul style="list-style-type: none"> • the grades and number of students to be served in each of the first three years of operation, and • the number of each type of instructional and non-instructional personnel each year. (2 points)	Meets	2	Meets the Criteria
C.3c	Describe a compensation and benefits plan that supports personnel qualifications and experience required to support the program of instruction. (1 point)	Meets	1	Meets the Criteria
C.3d	Provide a detailed plan to recruit, hire, and train instructional staff consistent with the start-up of the school. (2 points)	Meets	2	Meets the Criteria
C.3e	Describe how the process for recruiting initial instructional staff and the identified salaries in the Three-Year Operational Budget result in a staff qualified to effectively implement the program of instruction. (2 points)	Meets	2	Meets the Criteria

C.3f	Ensure all salaries and Employee Related Expenses (ERE) described in the narrative are accounted for in the Start-Up and Three-Year Operational Budgets and fully described in the Budget Assumptions. (1 point)	Meets	1	Meets the Criteria
	C.3 Total-Falls Far Below	0	Total Score:	
	C.3 Total-Approaches	0	10	
	C.3 Total-Meets	6		
C.4	Start-Up Budget	Rating	Scoring	Technical Assistance / Comments
C.4a	List only sources of start-up revenue fully supported by Verifiable Proof of Secured Funds documentation. (2 points)	Meets	2	Meets the Criteria
C.4b	List expenditures to cover the start-up plans described in the application package. (2 points)	Meets	2	Meets the Criteria
C.4c	Demonstrate through the assumptions that the amounts listed are viable and adequate. (2 points)	Meets	2	Meets the Criteria
C.4d	Ensure revenues cover expenditures. (2 points)	Meets	2	Meets the Criteria
C.4e	Ensure that timeframes described in all sections of the application package are consistent with timeframes listed on the Start-Up Budget. (1 point)	Meets	1	Meets the Criteria
C.4f	Be consistent with all sections of the application package. (1 point)	Meets	1	Meets the Criteria
	C.4 Total-Falls Far Below	0	Total Score:	

	C.4 Total-Approaches	0	10
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	C.4 Total-Meets	6	
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C.5	Three-Year Operational Budget	Rating	Scoring	Technical Assistance/ Comments
C.5a	List expenditures to cover the Educational Plan, Operational Plan, and Business Plan described in the application package. (2 points)	Meets	2	Meets the Criteria
C.5b	Ensure state equalization detailed in the Projected Revenue Calculator is consistent with the Target Population and the student count by grade level. (2 points)	Approaches	0	State equalization detailed in Projected Revenue Calculator for year one is not consistent with the revenue listed in the three year budget.
C.5c	If student count add-ons are used in determining projected revenue) Provide an adequate rationale for using the student count add-on levels in the Projected Revenue Calculator in the assumptions that is consistent with the target population described in Section A.2. (2 points)	N/A		Not Applicable
C.5d	Provide an adequate rationale for the percent of full enrollment used as the basis of the budget for Year 1 consistent with Section C.2. (2 points)	Approaches	0	Addresses criteria, but lacks sufficient detail in providing an adequate rationale for the percent of full enrollment used as the basis of the budget for Year 1.
C.5e	Demonstrate through the assumptions that the amounts listed are viable and adequate. (2 points)	Approaches	0	Addresses criteria, but lacks consistency in accounting for carryover funds.
C.5f	If operational revenue is used to pay for expenses incurred during the start-up period, clearly describe in the assumptions the sources of costs and repayment terms. (2 points)	Meets	2	Meets the Criteria
C.5g	Ensure revenues cover expenditures. (2 points)	Meets	2	Meets the Criteria
C.5h	Be consistent with all sections of the application package. (1 point)	Approaches	0	Addresses criteria, but lacks sufficient detail in ensuring consistency with sections C.5b and C.5d of the application package.
	C.5 Total-Falls Far Below	0	Total Score:	

	C.5 Total-Approaches	4	6
	C.5 Total-Meets	3	

Part C: Business Plan Total-Falls Far Below	0
Part C: Business Plan Total-Approaches	4
Part C: Business Plan Total-Meets	30
Total Scores	46