ARIZONA STATE BOARD FOR CHARTER SCHOOLS

NEW CHARTER APPLICATION RECOMMENDATION REPORT 2017

NOVEMBER 20, 2017

New Charter Application for the operation of

Edison School of Innovation

Submitted by

Edison Project

Report Summary

			Recommendation:	Approve	
Applicant Name:	Edison Project				
Proposed School Name:	Edison School of Innovation				
Grades Served Year 1:	K-8	Grades Served Year 2:	K-8	Grades Served Year 3:	K-8
Location:	West Phoenix/South Glendale Boundaries are W Northern Avenue to Thomas Road and 83rd Avenue to 107th Avenue.				
Mission Statement:	The mission of Edison School of Innovation is to provide the educational resources which will allow students to achieve high levels of proficiency in order to become competent and creative problem solvers now and in the future.				

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.

	Preliminary TRP Scores		Revised TRP Scores	
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 ≥ 95%?	No	51%	No	93%
Operational Plan Score ≥ 95%?	No	87%	Yes	100%
Business Plan Score ≥ 95%?	No	77%	Yes	100%

In-Person Interview Summary

The In-Person interview was attended by Mrs. Cheryl Rose, Mr. Edison Rose and Mr. Benjamin Horne. Mrs. Rose was the dominant contributor, answering approximately 85-90% of the questions, with Mr. Rose and Mr. Horne contributing when questions called for their expertise. Prior to the interview, the TRP was concerned about the projected enrollment figures for the first year of operation (270 students), the specific method in which the charter school would hire Highly Qualified/Effective staff members, and the purpose the Project Lead the Way curriculum would serve in the newly established charter school. These concerns were met with solid, thoughtful answers as evidenced below.

The Applicant sufficiently addressed the concern the TRP had about projected enrollment. Mrs. Rose explained that presently an academy exists in a district school in the targeted location that utilizes the Project Lead the Way curriculum, but not with fidelity. The parents of students enrolled in the academy are noticing that the curriculum has become watered down and they are looking for a solution. Additionally, the

district has chosen not to continue the program after this school year. Because of these factors, Mrs. Rose indicated that they believed they would be able to enroll students from this program and be able to meet their targeted enrollment of 270. (Capacity Interview, part 2 2:50) When asked if all students from the current Project Lead the Way program would attend the new charter school, Mrs. Rose responded that they would hope so, but realized there may be transportation issues. Without beginning the marketing efforts, there are currently 70 students on an "interest list". Mr. Horne provided the information when the TRP asked what the lowest enrollment could be in order to operate the charter school during the first year, (Capacity Interview part 2, 07:15) He indicated the charter school could operate with 200 students by adjusting the budget. The TRP came away from the interview with a much better understanding of how the newly formed charter school would strive to meet their targeted enrollment, and the strategies that would be used to make that happen.

Upon discussing how to ensure that Highly Qualified/Effective teachers are employed, Mrs. Rose indicated that the leadership team would look for individuals that share the philosophy and core values of Edison Project, are proficient in their content knowledge and willing to teach Project Based Learning. Potential candidates would demonstrate a lesson for the team and respond to "scenario type questions." Mrs. Rose also indicated that currently there are 23 teachers that are interested in coming to the school, and the charter school only needs 12 teachers for year 1.

The TRP was initially confused about the Project Lead the Way curriculum, because the application did not specifically state that this would be used at the proposed charter school, yet the students that were being targeted for school enrollment were the very students that currently participate in the Project Lead the Way program at the district school. Mrs. Rose clarified during the discussion of enrollment figures that Project Lead the Way program in the district school is going away, and these students will need somewhere to go. The Project Lead the Way curriculum will be used within the charter school and all teachers will be trained by Mrs. Rose, who has extensive training in the program, to ensure the program is implemented with fidelity.

The Applicant team demonstrated through the thorough answers and clarifications provided during the Capacity Interview that the founding members have the knowledge and skills needed to open and operate a charter school. Roles and responsibilities are clearly delineated so that each operational area, education, business and operations/compliance, will be overseen by the most qualified individual. The team shares a strong belief in the school's philosophy and vision and all are dedicated to bringing this new charter school to successful fruition.

TRP Qualitative Analysis Summary

The TRP recommends that the revised application package for Edison Project be approved because the educational plan provides a rigorous curriculum that will support the target population and assist the students on their way to becoming creative thinkers. The business plan is well thought out with an organization chart that demonstrates an understanding of the inner workings of a charter school and the organizational plan is well thought out with appropriate funds available for necessary equipment to meet the project based learning model. The Applicant team demonstrated during the Capacity Interview that they are a strong group of individuals who have the skills, knowledge and experience to support all three plans of the application.

The educational plan presents a well thought out curriculum that is aligned with a comprehensive assessment plan. The curriculum will provide many opportunities for the students in the target population to learn through project based learning while working with a team of students to solve problems. The

assessment system will assist the teaching staff in identifying gaps in student learning and will also provide data for curriculum revision as needed. Additionally, the Applicant will provide an environment where high expectations are the norm. The educational plan did not meet the >95% criteria because of a problem with the fourth grade curriculum section. The TRP determined that absent this issue, the educational plan is sound.

The operational plan includes delineated roles for the school leader, CFO and COO, along with an explanation of the relationship between the governing and corporate boards. Additionally, qualifications for each of the charter principals are included and indicate that each individual is duly prepared for their respective positions within the school. The operational plan met the Board's criteria for approval with no areas that were scored approaches.

The business plan demonstrates a conservative approach to staffing and acquisition of needed goods and services. The application indicated properties within the target geographic area that would be a possible location for the charter school that fall within the proposed budget. The business plan met the Board's criteria for approval with no areas that were scored approaches.

Educational Plan

	Preliminary TRP Scores				Revised TRP Scores			
Educational Plan Score ≥ 95%?	No	25	Of	49	No	46	of	49
Number of "Falls Below" ratings	0				0			
Number of "Approaches" ratings	24				3			

Plan Summary

Edison Project proposes a K – 8 school that will prepare students to be problem solvers. The target population is located in the West Phoenix/South Glendale region and consists of families that seek a gifted education and those that have an interest in math and science. Project based learning encompasses a large section of the curriculum allowing students to work collaboratively and self-directed as a group, to solve problems. (Capacity Interview part 1, 12:38)

The target population includes a large quantity of students that currently attend a district school where the Project Lead the Way academy is located. Because this program is being phased out by the district school, the Applicant is anticipating many of the students currently attending the program will seek a challenging curriculum elsewhere. With the inclusion of Project Lead the Way at the Edison Project, along with a strong foundation of literacy and numeracy skills, the students will be prepared for a future that is ever-changing.

The educational philosophy of providing educational resources which will allow students to achieve high levels of proficiency in order to become competent and creative problem solvers now and in the future, will be supported by a rigorous curriculum, highly effective teachers who are experts in using data to drive instruction and using project based teaching methods, and a school culture that will focus on encouraging effort and teamwork in addition to becoming masters of the core content areas.

Using a traditional school calendar of 180 instructional days each year, with the school days being 7 hours long with the exception of Wednesdays, where students are released early so that teachers can have time to collaborate and receive professional development. During each school day, extended periods of time are given to the study of Math and English Language Arts, with at least one hour each day devoted to project-based learning. Progress monitoring assessments using ATI/Galileo will be given when a student enters school and then quarterly to check skill attainment. Along with this process, assessments will be used through each curriculum area and will assist teachers in checking for understanding and more importantly, to use the information gathered as a learning opportunity for students.

Analysis

The educational plan approaches the criteria for approval because the fourth grade writing curriculum sample did not align to the required criteria. However, outside of that curriculum sample, the Applicant provides a well thought out, comprehensive plan that includes high-yield instructional strategies along with an engaging curriculum where students will learn to work within a group, searching for answers to given problems. The target population is currently attending Project Lead the Way academy, located within a local district school, but the program will not be offered after this school year. During the Capacity Interview, (part 1, 12:38), the Applicant indicated they are prepared to meet the needs of this "underperforming population of Gifted and Talented and potentially high achieving students" as reported in the application. The TRP was assured through the interview process that this curriculum would be well received by the target population.

In addition to Project Lead the Way curriculum, the Applicant will provide ELA and math curriculum that is aligned to the Arizona College and Career Ready Standards. A process is in place that will ensure the curriculum is revised and adjusted as needed, based on assessment data gathered from the AzMERIT exams as well as data gleaned from the comprehensive assessment system the charter school has in place. (Educational Plan A.5: Academic Systems Plan) This assessment plan includes formative and summative assessments, both teacher designed and curriculum provided, as well as benchmark assessments that will determine specific standards that are met by individual students and by groups of students and standards that are not being met. The school calendar provides early release days each Wednesday for the staff members to collaborate on any curriculum/assessment issues and work to make positive adjustments to the program of instruction. The Applicant has presented both in the application and through the Capacity Interview that the curriculum is aligned to the assessment system which together present a program of instruction that is comprehensive and well thought out relating to the target population and how the students will best be served.

Through the use of highly effective teachers identified through the interview process, the Applicant will provide students with an environment that will challenge them and provide them an arena to grow as individuals towards reaching their full potential as individual students and as members of a group.

Operational Plan

	Preliminary TRP Scores				Revised TRP Scores			
Operational Plan Score ≥ 95%?	No	20	of	23	Yes	23	of	23
Number of "Falls Below" ratings	0				0			
Number of "Approaches" ratings	3				0			

Plan Summary

The corporate board of Edison Project is the governing board of the school. The governing board will focus on ensuring the mission and vision of the charter school are carried out in the manner in which they are intended. The board will be responsible for oversight of all operations and development of policies. The organizational structure indicates the position of principal, COO (Chief Operating Officer), and CFO (Chief Financial Officer) will report to the board. Outside services will be contracted for special education, food service, legal, auditing and custodial services. Employee benefits and property/liability insurance will also be outsourced.

Analysis

The operational plan meets the criteria for approval because the section provides an understanding of the function of the governing board as compared to the employees that will operate the charter school on a day to day basis. Roles and responsibilities of the Principal, COO and CFO are well outlined, providing each individual with clear expectation of their role within the charter school. (Operational Plan B.3: Management & Operation, page 2)

The school administrative plan reflects the strength of the team. Each individual on the administrative team is well qualified for the position they will hold, having education and related experiences. This structure will ensure both the educational and operational side of the school will be well monitored and supported.

The board structure includes standing committees to support specific areas of responsibility; finance, academics, development and governance. Initially the board will be comprised of the three members of the corporate board, but will expand to up to seven members with staggered terms of office, once the charter school is approved. The governance plan will support the start-up and growth of the charter school as well as guiding the school directors in their effort to provide a high quality education to the students. (Operational Plan B.2: School Governing Body, pages 1 – 3) When identifying new individuals as board members, the charter school will rely on a Nominating Committee to seek out qualified individuals for specific roles on the board who have the ability to work as part of a team for the support of the growing charter school.

The Applicant has identified areas of the operation that will be outsourced. These areas include special education, food service, legal services, audit services, and custodial services. In addition, the entity will look outside for an employee benefits specialty group that will assist the charter school in securing affordable health benefits for the employees. Sources of possible vendors along with cost for each service are provided. The outsourced areas are common within the charter community and allow the charter school to provide much needed part time services from high quality vendors.

The Applicant brings together individuals who are experienced in the specific areas needed to operate a charter school – education, finance and operations. There is an understanding of the role of the governing board and how that role is separate from the jobs that board members will do each day to ensure the charter school is operating at its best. The team members understand the need to secure specific services that

cannot be covered by an in-house employee from vendors that specialize in needed areas. The TRP is convinced that the Applicant has demonstrated capacity to perform the operational tasks to a high level of success.

Business Plan

	Preliminary TRP Scores				Revised TRP Scores			
Business Plan Score ≥ 95%?	No	28	of	35	Yes	30	of	30
Number of "Falls Below" ratings	0				0			
Number of "Approaches" ratings	7				0			

Plan Summary

Proposed Location: Option1: 8365 W. Camelback Road
Option 2: 9980 W. Glendale Avenue
Option 3: 8921 W. Thomas Road
No facility has been secured.

Facilities Requirements: In year 1 the Applicant will require 12, 825 square feet, including 9 general classrooms, a PE/Multi-Purpose area and a music room. Non-instructional space includes administrative offices, storage, kitchen space and entry. In years 2 and 3, the Applicant will require 13,951 square feet with no increase in specialty spaces.

Budget Summary

	Startup Period	Year 1	Year 2	Year 3
Projected Enrollment:	0	225	243	243
Total Revenue:	260,000.00	1,457,923.00	1,573,177.93	1,645,131.03
Total Expenditures:	256,243.91	1.455.132.07	1,498,434.00	1,557,391.80
Ending Balance:	3756.09	2,790.03	74,743.93	87,739.23

The business plan includes three facilities located within the target area. The timeframe for acquisition of the property aligns to the start-up phase of the charter school. Each facility has room for expected growth during the first three years of operation. A lease option is preferred for the first years of operation with a landlord that will understand of the financial constraints upon a new charter school. The Applicant has secured the services of a real estate broker experienced in education to negotiate the deal. A small amount of growth is anticipated during the first three years of operation and the identified facilities reflect that possibility.

A marketing plan is in place to recruit students once the charter application is granted approval. A variety of marketing strategies are provided along with anticipated timeframes, to ensure target enrollment figures are met by the beginning of school.

The personnel plans include the desired number of employees within each of the first three years of operation. The plan outlines the minimum qualifications/experience of each position within the organization along with recruitment strategies and hiring practices. Once staff members have been identified the Applicant will begin summer professional development to ensure alignment with the school's philosophy/vision.

Both the start-up and operational budget include detailed information relating to sources of income including start-up funds, along with the specific expenses needed for full implementation of the program. The start-up expenditures are $256,243.91, which is slightly lower than the start-up revenue of $260,000.00. The operational budget is built upon 225 students for year 1, which is 83.33% of the targeted enrollment of 270 students. Years 2 and 3 enrollment figures are 90% of the targeted enrollment of 270 students.

Analysis

The business plan meets the criteria for approval because the Applicant provides a well detailed facilities plan that includes three different possible locations within the targeted area. Each facility has room for anticipated growth and opportunities for the cost of improvements to be rolled into the lease costs.

The TRP had initial concerns regarding the number of students expected to enroll in the charter school. During the Capacity Interview Mrs. Rose explained the rationale behind the projected enrollment. The target population is currently attending the Project Lead the Way academy which is located within a district school. This program will not be offered in the district school next year and the parents will be looking for opportunities to meet the needs of their Gifted and Talented students through a rigorous curriculum. The Applicant has yet to begin the outlined marketing campaign and already has 70 students on an interest list. (Capacity Interview, Part 2, 03:00)

A possibility of recruiting experienced staff members from the current Project Lead the Way academy will provide the teachers that have the mindset needed to work in a project based learning environment. Included in the Capacity Interview was further clarification on recruiting and interviewing strategies that will help identify the highly qualified teachers that share the philosophy and core values of the founders (Capacity Interview, Part 3, 14:05) Because the philosophy of the school lends itself to hands-on project based learning, it is crucial that the teachers are able to successfully teach in this type of setting. The Applicant indicated during the Capacity Interview that many teachers that are currently working in the Project Lead the Way academy are willing to work for the new school. These teachers have worked in this environment and would be an asset to the new school.

The budget aligns with the philosophy of the Applicant. Materials and curriculum needed for implementation of the program of instruction are provided as well as resources to provide the professional development both before school begins and throughout the school year as revisions are made to the curriculum and processes. The Applicant's decision to budget conservatively for the first year of operation, 83.33% of the projected enrollment, indicates a desire to ensure monies will be available for needed supplies and materials and for unforeseen expenses. The Applicant has demonstrated leadership capacity in the decision to include professional development activities prior to the school year that will assist teachers in the implementation of project based learning. Building a first year budget on 83.33% student capacity is a wise decision. The Applicant chose to be conservative in both expenses and revenue. This decision will ensure that the new school has sufficient funding throughout the first few years.

Evidence of Capacity

Applicant Summary

Name	Role	Attended Interview?
Benjamin Horne	Charter Principal, Chief Financial Officer, School Governing Body	Yes
Cheryl Rose	Charter Principal, School Governing Body, School Principal	Yes
Edison Rose	Authorized Representative, Charter Principal, Chief Operations Officer, School Governing Body	Yes

Analysis

The TRP finds the Applicant has a sufficient amount of knowledge, skills and experience to operate a highly-effective charter school. The information provided in the application not only speaks to a well-defined academic program, but a highly organized operation that demonstrates knowledge of the target population, effective business practices and sound governance practices. Throughout the Capacity Interview it was noted that the founding team is committed to the plan and the work that is required to open and operate a highly successful charter school.

The application is well written with sufficient details in each section to demonstrate a working knowledge of the plan and specific details to support the plan's initiation and ongoing operation. The educational plan is well thought out with a curriculum that is aligned to an assessment system, with the specific intent of meeting the needs of gifted and talented students in the targeted population area. There is a pipeline of students for this new school based on the closure of a district program. Even though the probable student population is high, the Applicant has chosen to be conservative in the budget estimates to ensure funding will cover expenses throughout the first few years of operation. The new school will be managed by three different individuals who will hold positions within the charter school that are tailored to their experiences and educational attainment. The individuals listed above are excited about the possibilities this charter school will provide to the student population to engage in problem solving tasks and to develop a mindset of ongoing academic growth. As indicated in the closing statement given by Cheryl Rose, "we are lifelong learners and innovators". This is the expectation of the students that will attend this charter school.

Even though Mrs. Rose answered the majority of the questions during the Capacity Interview, all members of the Applicant team were actively engaged and knowledgeable of their contribution to the application and eventually to the charter school. Mr. Edison Rose formed the corporation and has experience with ecommerce companies and stated that he will be reporting to the ADE. As indicated in the Application, (Operation Plan B.2: School Governing Body, page 4) Mr. Rose has a BS in Finance/Economics and is a Certified Associate of Project Management. Mr. Horne has a BS in Accounting and indicated he prepared the budget and will be the individual that will implement the informational technology within the new school. The interactions between the founding members indicated a shared leadership model with great collaboration abilities from all members.

The application was well written but the TRP had several concerns upon entering the interview. The concern about enrollment was addressed to the satisfaction of the TRP and concerns about the Board's Nominating committee were also satisfactorily addressed. There is no doubt that this founding team can implement and operate a charter school, weathering the challenges that will undoubtedly arise.