

# **APPENDIX B**

## **Submitted Application**

- 1. Title Page**
- 2. Educational Plan**
- 3. Operational Plan**
- 4. Business Plan**
- 5. Authorized Representative and Charter Principal Resumes**

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## New Application

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### Cover Page

#### Applicant Agreement Information

I certify all information contained in this application package is complete and accurate, realizing that any misrepresentation could result in disqualification from the charter application process or revocation after award. I understand that incomplete application packages will not be considered.

The Applicant acknowledges that all information presented in the application package, if approved, becomes part of the charter and will be used for accountability purposes throughout the term of the charter.

The Applicant acknowledges that the Principals are aware of their responsibilities in the operation of a charter school as described in Arizona statute and that the Applicant is subject to, and will ensure compliance with all relevant federal, state and local laws and requirements.

The Applicant acknowledges that if approved to operate a charter school, the Applicant must execute a charter contract with the Arizona State Board for Charter Schools ('Board') within twelve months after the Board decides to grant the charter. If a charter is not timely signed, the Board's decision to grant the new charter expires.

The Applicant acknowledges that if approved to operate a charter school, the Applicant must begin providing educational instruction no later than the second fiscal year after the Board's decision to grant the charter. Failure to begin providing educational instruction accordingly may result in the revocation of the charter.

The Applicant acknowledges that if approved to operate a charter school, the Applicant must provide the number of days of instruction as approved in the application within the State's fiscal year that begins July 1<sup>st</sup> and ends June 30<sup>th</sup>. Failure to do so may result in revocation of the charter.

#### Applicant Agreement Signature

Ana Diaz 09/13/2019

### Title Page

#### Applicant Name

Somerset Academy Arizona, Inc.

#### Charter School Name

Somerset Academy of the West Valley

#### Authorized Representative

- Lourdes Marrero
  - Email: [REDACTED]
- Taylor Smith
  - Email: [REDACTED]
- Ana Diaz
  - Email: [REDACTED]
- Todd German
  - Email: [REDACTED]

#### Authorized Representative Mailing Address

6340 Sunset Dr  
South Miami, FL 33143

#### County

Maricopa

#### Day Time Phone

305-519-4475

#### Fax

(No response)

#### Form of Organization

Non Profit Corporation

#### Education Service Provider (ESP)

EMO

#### Principal Background Information

**Charter Principals**

- Lourdes Marrero
  - Email: [REDACTED]
- Ana Diaz
  - Email: [REDACTED]
- Taylor Smith
  - Email: [REDACTED]
- Todd German
  - Email: [REDACTED]

**School Governing Body**

- Ana Diaz (Charter Organization)
- Todd German (Charter Organization)
- Lourdes Isla (Charter Organization)
- Taylor Smith (Charter Organization)

## Target Population

**Mission Statement**

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

**Grades Served**

- K
- 1st
- 2nd
- 3rd
- 4th
- 5th

**Enrollment Cap**  
600

**Grades Served Year 1**  
K-3

**Projected Enrollment Cap Year 1**  
264

**Grades Served Year 2**  
K-4

**Projected Enrollment Cap Year 2**  
374

**Grades Served Year 3**  
K-5

**Projected Enrollment Cap Year 3**  
506

**School Calendar**  
• Standard

**Instructional Days**  
180

**Target Start Date**  
08/03/2020

## A. Educational Plan

**A. Educational Plan**

The Educational Plan should define the plan for providing a learning environment that will improve pupil achievement in the target population (A.R.S. § 15-181) to include what students will achieve, how they will achieve it, and how the school will evaluate performance. It should provide a clear picture of what a student who attends the school will experience with respect to educational climate, structure, assessment, and outcomes.

Note: Attached files are not uploaded or saved automatically. You must save the application in order to save the files.

**A.1. Educational Philosophy** –  [Download File](#)

**A.2. Target Population** –  [Download File](#)

**A.3. Program of Instruction** –  [Download File](#)

**A.3.1. Mastery and Promotion** –  [Download File](#)

**A.3.2. Course Offerings and Graduation Requirements**  
No documents were uploaded.

**A.4. School Calendar and Weekly Schedule**

-  [Download File](#) – Exhibit Weekly Schedule
-  [Download File](#) – Exhibit Annual Calendar
-  [Download File](#) – Revised Narrative

**A.5. Academic Systems Plan**

 [Download File – Revised Academic Systems Plan](#)

**A.6. Instructional Analysis**

 [Download File – Instructional Analysis Revised K-2](#)  
 [Download File – Instructional Analysis Revised 3-5](#)

**B. Operational Plan****B. Operational Plan**

The Operational Plan should provide an understanding of how the Applicant and school will operate, beginning with its management and governance. It should present a clear picture of the Applicant's operating priorities, delegation of responsibilities, and relationship with key stakeholders.

Note: Attached files are not uploaded or saved automatically. You must save the application in order to save the files.

**B.1. Applicant Entity**

 [Download File – Exhibit Org Charts](#)  
 [Download File – Exhibit Resolution](#)  
 [Download File – Exhibit Articles of Incorporation](#)  
 [Download File – Exhibit Bylaws](#)  
 [Download File – Exhibit Annual Filing](#)  
 [Download File – Revised Narrative](#)

**B.2. School Governing Body –  [Download File](#)****B.3. Management & Operation**

 [Download File – Revised Narrative](#)

**B.3.1. Education Service Providers**

 [Download File – Exhibit Draft Esp Agreement](#)  
 [Download File – Exhibit ESP Performance](#)  
 [Download File – ESP List of Schools](#)  
 [Download File – Revised Narrative](#)

**B.3.2. Contracted Services –  [Download File](#)****C. Business Plan****C. Business Plan**

The Business Plan should provide an understanding of how the Applicant intends to develop and manage the school's financial operations to ensure a secured facility, appropriate personnel, and necessary instructional and operational resources to open and sustainably operate a school.

Note: Attached files are not uploaded or saved automatically. You must save the application in order to save the files.

**C.1. Facilities Acquisition**

 [Download File – Site Survey](#)  
 [Download File – Site Plan-Revised](#)  
 [Download File – Narrative Revised](#)  
 [Download File – Other available locations](#)  
 [Download File – Revised Floor Plans- Internal Dimensions in Narrative](#)

**C.2. Marketing and Student Enrollment –  [Download File](#)****C.3. Personnel –  [Download File](#)****C.4. Start Up Budget**

 [Download File – Exhibit Budget](#)  
 [Download File – Assumptions Revised](#)

**C.5. Three Year Operational Budget**

 [Download File – Revenue Calculator](#)  
 [Download File – Budget](#)  
 [Download File – Assumptions Revised](#)

**Additional Information****Additional Information**

Do not complete this section unless specifically directed to do so in the application being completed.

# **Educational Plan**

- A.1 Educational Philosophy
- A.2 Target Population
- A.3 Program of Instruction
  - A.3.1 Mastery and Promotion
- A.4 School Calendar and Weekly Schedule
- A.5 Academic Systems Plan
- A.6 Instructional Analysis

**A.1**

# **Educational Philosophy**

## A.1 Educational Philosophy

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### a.) School's Philosophical Approach:

Somerset Academy of the West Valley School (SAWV) will serve students in grades kindergarten to fifth grade and will have an emphasis on cultivating effective leaders, developing good character, and instilling in each child a desire to render service. Students will be prepared in an academically challenging and personally meaningful learning environment with an emphasis on developing leadership skills, increasing literacy, fostering good citizenship and character, and seeking opportunities to serve their classmates and their school community. A collaborative effort including students, teachers, parents, and staff will be devoted to establishing, achieving, and celebrating individual goals for each child at Somerset Academy of the West Valley.

Somerset Academy of the West Valley seeks to replicate the highly successful Somerset Academy Inc.'s 55 charter schools in Florida, 25 of which were designated High Performing Charter Schools by the Florida-Department of Education in the Glendale community. In order to continue to achieve academic excellence as part of the Somerset network, Somerset Academy of the West Valley will provide a program that delivers a well-rounded curriculum aligned to the Arizona Standards. To further the mission, the school will prepare all students to achieve proficiency on state assessments, strengthen the school-home connection and meet the individual needs of the student population. The School will also feature technology-rich classrooms, be staffed with certified master teachers qualified in their field; thus, providing an enriching learning environment where children can flourish as individuals while acquiring knowledge and the skills essential to their future development.

All Somerset programs implement the "neighborhood" school paradigm in their management structure to consistently maintain the feeling of a small school environment. The "neighborhood school" philosophy is a common philosophy of student expectations, a unique code of excellence, an expectation of parental commitment, and a collaborative management infrastructure derived from the inception of its first school. Varying from 150 to 2,200 students, all Somerset programs have implemented the "neighborhood" school paradigm. Somerset teachers are taught and immersed in the "Somerset way" meaning that all teachers received professional development and support in serving all their students' needs. Teachers will give all students the support they need to excel and are committed to providing differentiated instruction to ensure positive student performance and achievement results. Somerset programs also strive to make parents feel welcomed and a part of the educational process for their children so that everyone in the school community is accountable for the student and the overall school results.

Existing Somerset Academy, Inc. schools have implemented unique and innovative strategies aimed at student achievement and proven these strategies to be successful with all student populations, including students with special needs (ESS) and English Language Learners (ELL). The results on standardized exams and learning gains, especially in mathematics, evidence this success. Furthermore, Somerset Academy, Inc. has the combination of experience and a demonstrated track record of success with programs that promote increased student achievement across its network of schools.

### b.) Fundamental Elements of the School's Program of Instruction:

Somerset Academy of the West Valley will offer a well-rounded and rigorous educational program

that will hold itself and its students accountable for meeting self-imposed goals and standards, as well as those required by the State of Arizona and the sponsoring school district. The educational philosophy of the School is rooted in increasing learning opportunities and raising the academic achievement of all its students. To meet this goal, the school commits to:

- Deliver increased learning opportunities for its all students, by providing challenging curriculum within a supportive, quality-learning environment;
- Design and implement a continuous improvement methodology wherein student assessment results
- Offer opportunities for differentiated and targeted instruction tailored to students' individual needs, ensuring consistent increased student achievement outcomes;
- Expect and encourage that all students will realize their highest academic potential, especially in the core subjects of language arts, mathematics, science and social studies, and provide the means for these students to reach their potential;
- Surpass the average student academic performance of the local district in all required public accountability tests; and
- Seek out, establish, and maintain sound, mutually beneficial partnerships with local education and civic institutions to provide a wide array of educational experiences for students to enjoy continued learning opportunities beyond the immediate classroom.

The school's educational program is aligned to specific innovative learning methods and strategies – with emphasis on low-performing students and reading – that have proven successful in raising student learning and achievement. These include but are not limited to:

- A standards-based curriculum infusing a thematic approach to integrate core areas of study such as mathematics, reading, language arts, writing, science, and social studies;
- An emphasis on preparing students for a post-secondary education;
- A technology rich environment;
- Appropriate assessments for learning (screening, progress monitoring, and diagnostic);
- Data-driven high quality differentiated instruction;
- Supplemental programs for student advancement and remediation;
- A standards-based curriculum;
- Research-based instructional practices (i.e., Marzano's High Yield Teaching Strategies and Coalition of Essential Schools Principles);
- Tutoring for remediation and acceleration; and
- Support for teachers and ongoing professional development.

Student proficiency is a fundamental need and the basis for assimilation and mastery of all curriculum to be implemented. Thus, teachers and staff will have training in and access to instructional materials to reinforce academic skills in all courses. Some of these reinforces include: Structured Independent Reading, Reciprocal Teaching, Vocabulary Development, CRISS (Creating Independence through Student-owned Strategies), Cooperative Groups, and Graphic Organizers, to name a few.

In addition, the School will increase learning opportunities for all students through careful, frequent monitoring and assessment of student performance. Emphasis will be placed on low performing students, beginning with identification of those not making adequate progress and/or not demonstrating mastery of the Arizona Standards, as adopted. Differentiated instruction and other appropriate measures for targeted instruction will then be instituted for these students, and

those who are not performing at grade level will be placed on a Progress Monitoring Plan (PMP).

The School's curriculum will serve students of all ability levels and aim for mastery of the Arizona Standards for all students. Using data from assessments and other applicable state and district assessments, Somerset Academy of the West Valley will measure its own progress in meeting the needs of its student population. The school will annually develop measurable learning objectives over the major subject areas, to target student learning and development needs in its annual *School Improvement Plan (SIP)*. Arizona Standards, as adopted, that are not mastered will be identified, and appropriate measures for remediation will be instituted. Students in need of remediation and students with special learning needs will have access to supervised study time and tutoring after school (and possibly on Saturdays, as well) to accelerate their progress.

Somerset Academy of the West Valley is designed to offer a disciplined, balanced and enriched education of the highest quality in preparing students for a successful post-secondary school education. Thus, innovative programs will be incorporated into the curriculum framework with the intention of graduating responsible, college-bound students. Somerset Academy of the West Valley will not be restricted to the content of the program of instruction, and whenever appropriate will introduce new elements to the courses offered.

Somerset Academy of the West Valley will maintain a commitment to the instruction of the Arizona Standards and to the mastery of these standards by the students. Additionally, it will encourage teachers to use a variety of instructional methods to deliver the coursework, with an emphasis on infusing technology. While setting high academic expectations for all students, Somerset Academy of the West Valley will provide students the means to reach their academic goals through differentiated instruction methodology and hands-on, inquiry-based investigations in their coursework.

Additionally, educators will be encouraged to exercise freedom in delivery of the content and experiment with new instructional techniques in meeting with the needs of their students. All students learn differently, and teachers will be required to adapt their teaching styles to fit the learning needs of their populations. This student-centered approach ensures the curriculum will be accessible to all students, regardless of level.

Thus, academic excellence and performance will drive teachers' pedagogical efforts and their commitment to students will manifest itself in all aspects of Somerset Academy of the West Valley. Teachers will deliver instruction to address the respective Arizona Standards by employing effective research-based strategies such as critical-thinking skills, hands-on learning, inquiry-based research projects, science experimentation, technology rich environments, CRISS (Creating Independence through Student-owned Strategies), Reciprocal Teaching, and high expectations for all students. Like that of the school it will replicate, the School's educational philosophy is grounded in the expectation of increasing learning opportunities and raising the academic achievement of all of its students through high expectations and character development.

Somerset Academy, Inc. believes that all students can and will learn and that equitable, high-quality education should be communicated and sustained at all schools. Additionally, Somerset schools operate on the belief that students will work up (or down) to the expectations that are set, thus setting nothing less than high expectations combined with a rigorous curriculum based on the following pillars of the Somerset Model:

## **Ownership**

- School programs tailored to the students and community to be served
- Stakeholders (board members, parents, teachers, and community) involved in the educational process
- Facilities – Uniquely designed to address the needs of each of its communities

## **The Culture**

- Encouraging setting that gives students sense of belonging
  - High Expectations for all
  - Code of Excellence – fostering Character Development and Ethical Behavior
  - Parental Agreements encouraging high parental involvement
  - Strong Leadership Team
  - Uniform Policy – everyone is part of one family
  - Diverse extra-curricular programs, such as a variety of clubs, sports, and activities
  - Career/College counseling services

## **Community Partnerships**

- Parents, Community, Educational Institutions (Grand Canyon University)
- Governments, Business Entities

## **Rigorous Curriculum Framework**

- Aligned Curriculum in Grades K-5
- Student-Centered Instruction
- Technology integration in all content areas
- Targeted After-school and Saturday Tutorial Sessions
- Push-in/Pull-out Remediation and Enrichment Programs
- College Awareness and Career Exploration

## **Continuous Evaluation and Improvement**

- School Mission and Vision Driven Program
- Responsibility aligned with Accountability

The School will combine the best practices developed by model schools, including the school it will replicate, with “powerful guiding ideas” and principles driving essential school reform nation-wide. Specifically, the School will utilize as the basis for its educational program, the same core concepts implemented successfully across Somerset’s network of schools, and further substantiated by research.

The following table lists teaching methods, principles, and essential components of the School's educational program based on the research of the Coalition for Essential Schools *Common Principles*[1] (CES):

CES PRINCIPLES	INSTRUCTIONAL STRATEGIES & POLICIES
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[1] CES - Coalition of Essential Schools - “Interpreting the Nine Common Principles” [Patricia Wasley, Barbara Powell, Donna Hughes](#): CES National, 1992.

<p><b>Intellectual Mission - Articulate a common intellectual mission for all students.</b></p>	<p><i>We believe in a common intellectual focus of high academic standards and behavioral expectations for all.</i></p> <p>The School's Mission Statement will be reflected in its culture, programs, and daily life. Guided by high expectations for all, the School will foster the development of self-directed learners who think creatively and set high goals for themselves.</p>
<p><b>Intellectual Focus - The school should focus on helping students learn to use their minds well.</b></p>	<p><i>Academic Excellence and Character Development is at the heart of the School's educational philosophy. Accordingly, the School's intellectual focus centers on high academic and behavioral expectations for all students communicated through the School's Code of Excellence and the Code of Student Conduct. As teachers are expected to model this behavior in a professional environment, the School will set high academic and behavioral expectations for teachers as well and communicate these through the Faculty Handbook.</i></p> <p>A Professional Development Plan will be priority. The School will provide staff development, support and assessment of best teaching practices through comprehensive activities throughout the school year. This will allow us to offer continuous support as we strive for excellence.</p> <p>The School will monitor students' academic and emotional progress through a "Push and Pull" Method of Instruction. We will identify and "pull" students in need of remediation and "push" students at grade level to take the most challenging curriculum in which they can be successful to maximize upon their potential. This will be achieved through the following strategies:</p> <p><b>Personalized Education Plans:</b> Students achieving below grade level will have a Progress Monitoring Plan (PMP) designed to remediate deficiencies. The plan will consider a student's academic profile in the areas needing remediation, a timeline for remediation, and strategies to be utilized to bring the students back on track. This will aid students in preparing academic and personal goals for the school year and will allow teachers and parents to track student progress towards these goals and graduation. Additionally, parents will have access to academic reports through traditional means such as report cards and parent conferences will also be able to track their children's academic progress through continuous communication with academic mentors.</p> <p><b>Target Tutoring:</b> The School believes that each student has a unique learning style and will use data to drive instruction and remediation strategies for targeting each student's academic need, as well as to enrich instruction and accelerate learning for students showing potential in specific areas. The School will provide</p>

	<p>opportunities and tutoring sessions to teach one student or a small “targeted” number with the same instructional needs or potential. Home learning policy: In order to reinforce and practice skills taught in the classroom, all teachers will be required to grade, discuss, and comment on homework regularly. Attention will be given to both quality and quantity of home learning projects.</p>
<b>Universal Goals - The school's goals should apply to all students. School practice should be tailor-made to meet the needs of every group.</b>	<p><i>The School has defined specific Universal Student Goals for the targeted student population that will apply to all students at the School.</i></p> <p>These include:</p> <p><b>Habits of Work Goal:</b> Students at the School will develop the work habits necessary to effectively learn subject matter, produce quality assignments, use time effectively, and use creativity to devise better solutions. Through development of effective work habits, students gain greater autonomy and realize their potential.</p> <p><b>Self -Esteem and Character Development Goal:</b> Students will be able to identify their learning strengths, challenges, and passions; evaluate this knowledge in terms of their short- and long-term goals; and create a plan of action for their life-long learning based on this evaluation. Character development and behavior management techniques are an important part of the curriculum and increase self-esteem by providing opportunities for academic success. Character development will be encouraged through community service programs and volunteerism.</p> <p><b>Community Building Goal:</b> The School will expect all students to be active and contributing citizens within their school and community. Students will be instructed as to the importance of community responsibility and will understand the School’s focus on service learning. Students will understand the effect that they have upon the community and will take the initiative to better themselves and the community as a whole.</p>
<b>Less is More - Curricular decisions should be guided by the aim of thorough student mastery and achievement rather than by an effort merely to cover content.</b>	<p><i>The School values Interdisciplinary Connections. As teachers build on interdisciplinary connections, students naturally begin to link information between and among courses, increasing the relevancy of skills and content in such courses.</i></p> <p>Though Differentiated and Standards-Based Instruction, the School will provide a learning environment that maximizes potential for student success. Teachers will use differentiated instructional strategies that connect with individual students’ learning needs. Additionally, teachers will manage instructional time to meet mandated standards while providing motivating, challenging, and meaningful experiences for students to receive and process information in ways that require differentiation of experience. These instructional practices will include:</p>

	<p><b>Direct Instruction (lecturing/modeling):</b> This methodology will be used when teachers need to explain or demonstrate specific content and skills. Explicit, systematic instruction will be based on the FS, and all applicable NGSSS, as adopted. This instruction will be structured and based on mastery learning. Frequent curriculum-based assessments help place students in ability groups for further differentiated strategies and identify students who require additional intervention.</p> <p><b>Scaffolding:</b> Teachers will identify the current developmental skills of individual students based on assessments and provide support structures to help students move to the next level. As the year progresses, students become more adept at skills and at directing their learning, and learning becomes more autonomous.</p> <p><b>Cooperative Learning:</b> Teachers will guide small-group learning to increase communication and team-building skills. This strategy is based on grouping small teams of students heterogeneously according to ability, interest, background, or other commonalities. Some Cooperative learning activities may include Jigsaw II, STAD-Student Teams, and Group Investigation.</p> <p><b>Inquiry-Based Learning:</b> Based on the scientific method, this student-centered strategy will require students to conduct investigations independent of the teacher, unless otherwise directed or guided through the process of discovery. Teachers will use this strategy in developing critical thinking and problem-solving skills.</p> <p><b>Information Processing Strategies:</b> Teaching students "how to" process information is a key factor in teaching students how to strategically organize, store, retrieve, and apply information presented. Such strategies will include memorization, KWL, reciprocal teaching, graphic organizing, scaffolding, or webbing</p>
<b>Teacher- as-Generalist - Staff should expect multiple obligations (teacher-counselor-manager) and a sense of commitment to the entire school. (Participatory management, teachers developing curriculum,</b>	<p><i>The School will develop a Professional Learning Community (PLC) atmosphere by using professional development throughout the school year to allow for common planning and teaching teams, both within grade levels and subject areas. Through professional development activities planned within the school calendar, teachers will have opportunities to reflect on practice, discuss research and cases of learning, and examine student work. Such a culture makes it safe for teachers to share universal goals, confront what is and isn't working, and transform their own thinking and practice.</i></p> <p>Professional development will include:</p> <p><b>Vertical Alignment (by subject and grade level):</b> Teachers will be permitted common planning time by department in order to correctly align courses by quickly assessing what students mastered in preceding grades and focusing on building skills and knowledge. This will eliminate the common problem of consuming valuable</p>

<b>changing teacher practices).</b>	<p>instructional time with unnecessary reviewing and re-teaching of skills that have already been mastered.</p> <p><b>Horizontal Alignment (by grade level):</b> The School will encourage teacher collaboration and cross-curricular planning, allowing all teachers of a common grade level to address specific subject matter following the same time line. Such alignment is crucial in school systems dealing with state-mandated, standards-based assessments. It also allows students to see interdisciplinary connections.</p>
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Additionally, the School will base its teaching methods, principles, and essential components of its educational program on the research of the Big Picture Company's *New Urban High School Design Principles*<sup>[2]</sup> (NUHS) (that address the core principles of high school reform), as listed below:

NUHS PRINCIPLES	INSTRUCTIONAL STRATEGIES & POLICIES
<b>Personalization - Create settings where teachers and students can know each other well.</b>	<p><i>We believe that students learn best in a personalized small school setting:</i></p> <p>In an effort to maintain Small Class Sizes, the School will commit to maintaining student-to-teacher ratios as required by Arizona Law as applied to charter schools, and to implement a standards-based teaching approach to allow greater attention and service to the individual student.</p>
<b>Context for Reflection - Provide interactive, reflective contexts for students.</b>	<p><i>We believe in providing opportunities for students to reflect on their own work and its meaning outside of school.</i></p> <p>Reflection allows students connect their experiences with academic and real-world standards. With this in mind, the School will provide reflective contexts for students through:</p> <p><b>Seminars &amp; Initiatives:</b> A central component of these programs will focus on higher order skills and connections beyond the classroom. Teachers will allow students to practice these skills and apply them across the curriculum. College Preparation and internship seminars, and Community Building Initiatives will allow students to connect their experiences with academic and real-world standards.</p> <p><b>Study Skills Training:</b> The School will provide its students extensive study skills training and opportunities for self-reflection about learning. Students will understand different aspects of learning through discussions and will explore how they learn, what their learning strengths and weaknesses are, and why different learning strategies are used in different situations.</p>

[2] NUSH - *New Urban High School: A Practitioner's Guide*: The Big Picture Company, 1998

<p><b>Teacher as Designer - Conceive of the teacher as designer, inquirer, clinician.</b></p>	<p><i>We believe that highly effective educators are those who feel ownership of the school program</i></p> <p>The School sees Teachers as facilitators and Providers of Opportunities for Learning, NOT providers of information. Using differentiated instructional strategies, teachers will tailor their instruction and adjust the curriculum to students' needs rather than expecting students to modify themselves to fit the curriculum.</p> <p>When Teachers Develop Curriculum, it serves to increase their "buy-in" to the pedagogical process. As the School, teachers will play an integral role in the development of core curriculum, maintaining and exceeding high expectations, in alignment with the Arizona Standards, as adopted. Thus, curriculum development will reflect what and how best to present a core body of knowledge.</p>
<p><b>Real World Immersion - Situate students directly in the world beyond school.</b></p>	<p><i>We believe that learning should take place beyond the classroom.</i></p> <p>The World Outside the Classroom will be accessible to students at the School through job shadowing, project-based learning initiatives, and community service.</p> <p>Additionally, teachers will engage students in Service Learning Projects that start in the classroom and extend beyond it, encouraging responsible, caring participation in the local environment and in the wider world. Additionally:</p> <p><b>Service-learning Activities in Courses:</b> The School will embed service-learning activities in academic courses (English, Math, Science, Social Science, and Foreign Language) to maximize student understanding of community responsibility.</p> <p><b>Service-learning Opportunities:</b> The School will provide Service Learning opportunities in all grades K-12 with a strong focus in the students in grades 6-12, encouraging students to reach-out into the community.</p> <p><b>Service Learning Requirement:</b> Students should have completed service learning throughout middle school grades and additional hours will be completed during the high school years in order for students to fulfill the service learning high school graduation requirement. Additionally, students will be encouraged to actively engage in the community and complete more service than required.</p>

<p><b>Community Partnership - Work closely with family and community.</b></p>	<p><i>We believe in working closely with family and community.</i></p> <p>The School will provide Enrichment Activities and Community-based Initiatives, allowing students to interact in social settings with diverse individuals. For example:</p> <p><b>Community Partnerships:</b> Teachers, students, parents and the administration will work together with the governing board and the School to identify potential community partners for internships, service learning opportunities, and other community-based initiatives at the school.</p> <p><b>Parental Involvement:</b> Learning is enhanced when a school encourages parents to stimulate their children's intellectual development. Parental "investment" in a student's education is crucial to student success as well as to the advancement of the School's mission and vision. Parental involvement agreements will encourage parents to contribute a minimum of 30 volunteer hours to ensure their active participation in their child's education. Parents will receive and sign a parent handbook that outlines the responsibilities they have for their child's learning and behavior at school.</p> <p><b>School Groups:</b> School partnership will also be encouraged through a Parent Teacher Student Association (PTSA) and other such school groups.</p>
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As noted above, Somerset West Valley will incorporate numerous proven methods of instruction that research such as Marzano's High Yield Teaching Strategies and Coalition of Essential School Principals has shown to increase student learning and achievement. All curriculum is also standard and researched based. In addition, Somerset West Valley will provide quality differentiated instruction by teachers that have extensive training on how to differentiate instruction to meet the needs of each individual student. Somerset recognizes that not all children learn at the same pace or in the same way so differentiation must occur in all classrooms to meet the needs of those students that may need extra support as well as for those students that understand a concept and can be given more in-depth and enriched content. While students in middle school and high school are able to take advanced classes as well as intensive classes, the K-5 program must still meet the needs of students needing extra support or enrichment therefore the quality differentiated instruction is fundamental to the school's program of instruction related to alignment with K-5 students

*c.) Mission Statement:*

The *vision* of Somerset Academy of the West Valley is "Empowering students to explore global learning opportunities to promote and enrich their communities and the communities we serve.". Additionally, the School will be guided by the *mission/purpose* of Somerset Academy Arizona Inc. as a whole which "promotes a transformational culture that maximizes student achievement and the development of accountable, global learners in a safe and enriching environment that fosters high-quality education." Somerset Academy of the West Valley is dedicated to providing a well-

rounded, academic curriculum in a ‘family-like’ environment that is rigorous, creatively stimulating, and nurturing. The School will 1) provide opportunities for active involvement of students, families, and communities; 2) provide a rigorous program with emphasis on student-centered instruction; 3) enhance classroom studies with technology and robust extra-curricular programs; 4) provide a nurturing ‘family-like’ environment to foster successful life-long learning.

*d.) Alignment of School’s Educational Philosophy and Mission:*

Thus, the School’s educational program aligns with its specific mission as it is designed to create students who play a decisive role in their own education, participating actively in their learning, while developing the tools to succeed. In doing so, the School expects that each student is capable of academic progress, and therefore commits to helping students explore and develop their intellectual potential. Furthermore, the educational program makes clear the School intends to develop students who not only learn, but also *enjoy* learning, thereby creating a “culture that maximizes student achievement and the development of accountable, global learners in a safe and enriching environment that fosters high-quality education.” The School will also prepare students to be college ready, setting the stage for postsecondary education and career path pursuits, and concurrently producing students who are contributing members to the community where they live and to society at large. The School also believes in reinforcing students’ personal character and will foster a culture where students are expected to be responsible for their own actions.

The School’s educational program is built on increasing learning opportunities and raising the academic achievement of its students through high expectations and character development. The instructional strategies and policies detailed in *Part A.3* of this section, such as personalized educational plans and targeted tutoring, illustrate the School’s commitment to each individual student’s success. Additional instructional strategies are described—such as direct instruction, scaffolding, and inquiry-based learning—clearly evidencing the School’s dedication to student advancement, regardless of level. The School’s dedication to creating a “safe and enriching environment,” as stated in its mission, is carried out through its character development initiatives, its respect for the arts, and its dedication to offering students instruction that is infused with technology. A rigorous focus on college-preparedness is clear through the use of research-based college-preparatory materials and real-world immersion activities. Therefore, the School’s educational program, as well as its research base and strategies, are in direct alignment with the school’s mission and moreover support and facilitate implementation of the mission.

*e.) Rationale for Approach:*

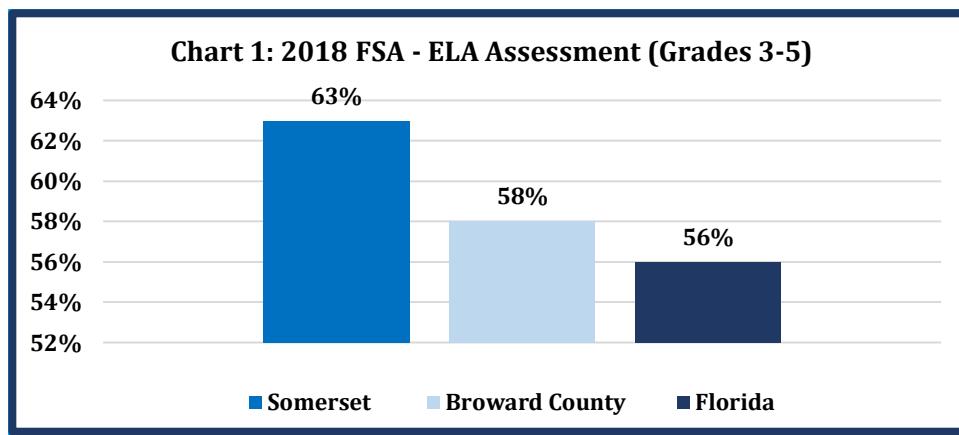
The Somerset Academy approach including differentiated instruction, personal educational plans, target tutoring, encouraged parent involvement, frequent monitoring and continual analysis of student progress data, and more, has a proven track record of success in communities with student populations similar to those in the Glendale Community (the proposed area for the school site). As noted in detail in sections A.2 and A.5, the findings of student populations within a five-mile radius of the school’s proposed location suggest a large percentage of students will be classified as minority and/or will qualify for free/reduced lunch. With over 70 Somerset schools nationwide, a wide demographic of students are served, however on average, the population served by Somerset schools reflect a 79% minority rate as well as 61% of students qualifying for free or reduced lunch, thus demonstrating Somerset’s experience with the target population. Success with the target

population is demonstrated by the operation of nearly 40 high performing schools as well as the higher rate of achievement on state assessments for Somerset students in comparison to other public school students, as shown in the charts below. Somerset's experience with similar populations as well as the approach to education and programming that is geared towards the individual student has proven successful for over two decades.

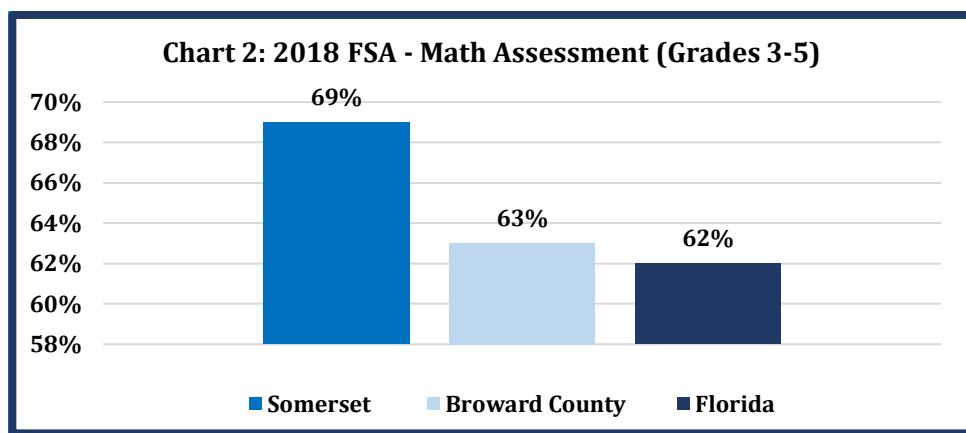
Furthermore, Somerset Academy, Inc. is a Florida not-for-profit educational institution with a proven record of successful development and operation of nearly 40 high performing charter schools serving nearly 30,000 students in K through 12<sup>th</sup> grade throughout 7 counties in Florida as well as in Las Vegas, NV and San Antonio, TX. The institution and its board of directors have over a decade of experience in charter school operations and management and oversight of public funds. Somerset Academy of the West Valley plans to replicate the existing Somerset Academy school educational programs in existence in the state of Florida.

Somerset Academy has developed a multi-tier system (management, instruction, assessment, and professional development) that has achieved increased performance across all student populations and subgroups as evident by their academic performance over the past two decades. Somerset Academy has been able to implement unique and innovative strategies aimed at student achievement and have proven these strategies to be successful with all student populations, including ELL and Special Education students, as well as those entering the school below grade level. The results on standardized exams and learning gains, especially in mathematics, have proven its success.

Please see **Chart 1** below highlighting the academic achievement of Somerset Academy Florida in *English Language Arts* as compared to the state of Florida and surrounding school districts:



Please see **Chart 2** below highlighting the academic achievement of Somerset Academy Florida in *Mathematics* as compared to the state of Florida and surrounding school districts:



The governing board of the proposed Somerset Academy of the West Valley is comprised of the same individuals responsible for the operation of the existing Somerset schools. These highly experienced professionals possess the expertise in the areas of curriculum, assessment, finance, law, school management and governance to be able to replicate the existing design. Somerset Academy, Inc. has financial and human resources available to replicate a high-quality model, the ownership of the existing school design, and most importantly, has a proven track record of success in replicating the design. These factors all support the organization's capacity to replicate the existing school design.

Somerset Academy, Inc. subscribes to the following Core Principles:

- Student learning and achievement is paramount
- Effective school leaders
- Highly qualified staff
- Effective governing board
- Safe and secure learning environment
- Data assessments to drive curriculum and educational focus
- Research-based curriculum
- Continuous Improvement
- Teacher training and mentoring throughout the academic year
- Balanced budgets to ensure resources for student achievement and teacher efficiency
- Teamwork with stakeholders - community leaders, parents, students, teachers, administration and governing board
- Communication among all Somerset leaders

Furthermore, Somerset Academy Inc. upholds the following beliefs in its commitment to educate its students:

- S** - Set high expectations  
**O** - Objective  
**M** - Meaningful curriculum  
**E** - Effective  
**R** - Resourceful and Responsible life-long learners  
**S** - Students who achieve proficiency and beyond

**E** - Evaluate continuously and utilize data to drive curriculum

**T** - Teachers who are highly qualified

**A.2**

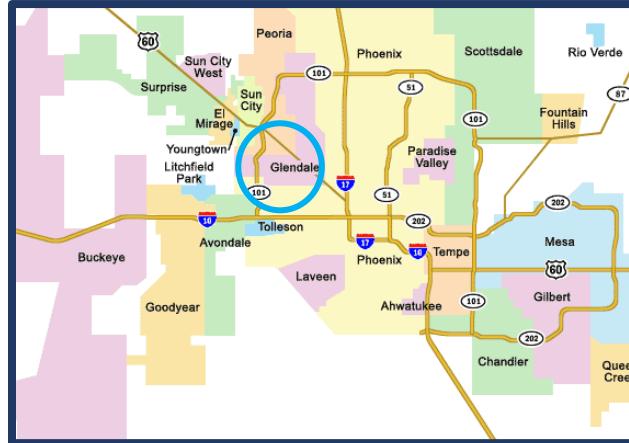
# **Target Population**

## A.2 Target Population

- a) **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.**

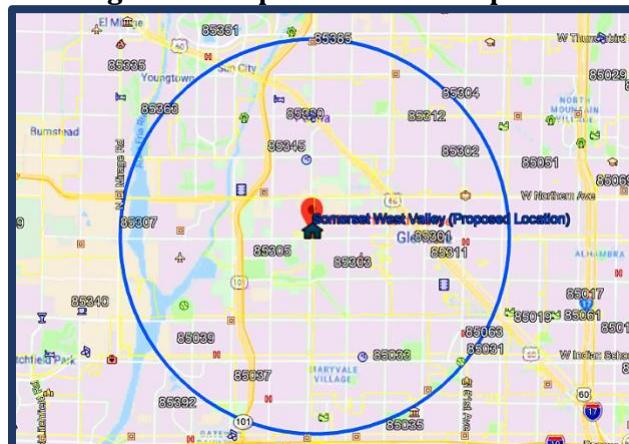
Somerset Academy West Valley's proposed school facility will be located in the city of Glendale, Arizona, a northwest suburb of the Phoenix Metropolitan Area. See **Image 1** below:

**Image 1: Somerset Academy West Valley Proposed Location**



As a public charter school, Somerset West Valley is open to all students within the state of Arizona. However, in its proposed location, Somerset West Valley anticipates serving mainly those students and families within the following zip codes: 85385, 85380, 85345, 85351, 85363, 85307, 85340, 85039, 85392, 85037, 85035, 85033, 85063, 85031, 85311, 85301, 185302, 85312, and 85304. See **Image 2** below:

**Image 2: Anticipated Serviced Zip Codes**



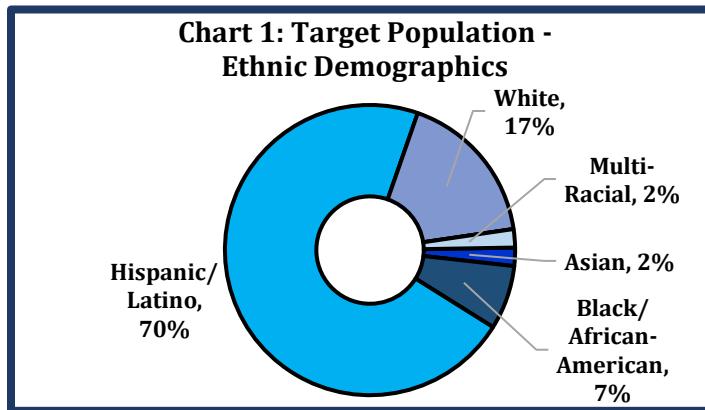
Somerset West Valley is proposing to open as Kindergarten through 5<sup>th</sup> Grade elementary school.

<sup>1</sup> Image obtained from Arizona Leisure: Vacation Guide. URL: <https://www.arizona-leisure.com/phoenix-area-map.html>; last obtained June 2019

Somerset West Valley is interested in serving this part of our community as it believes this is an area of the Salt River Valley that is of high educational need.

#### Educationally Disadvantaged Students

This educational need is first evidenced when one examines the student population demographics. In order to gain an in-depth understanding of our target population, all public elementary schools within a 5-mile radius of our proposed location have been examined by averaging all findings together as displayed in **Chart 1<sup>2</sup>** and **Table 1<sup>3</sup>** below:



**Table 1: Target Population - Student Subgroups**

English Language Learners	16%
Free/Reduced Lunch	81%
Students with Disabilities	11%

The data displayed in **Chart 1<sup>4</sup>** and **Table 1<sup>5</sup>** was obtained from the Arizona Department of Education's website for Accountability & Research, Data. Findings were obtained from all public elementary schools within a 5-mile radius of the school's proposed location and then averaged together. Thus, with 70% of the projected student population being Hispanic/Latino and 81% qualifying for Free/Reduced Lunch (FRL) services, Somerset West Valley anticipates serving a student population that is of high need and historically educationally disadvantaged.

#### Lack of Quality Education

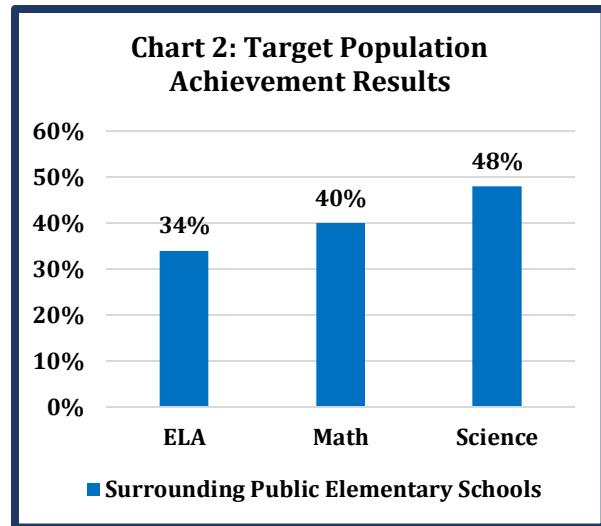
Furthermore, the educational need of our target population is also evidenced in the current academic results of the community. The proficiency results on the AzMERIT were obtained from Arizona's Department of Education website for these same schools within a 5-mile radius of the school's proposed location. As with the demographics above, these findings were compiled by tested subject area and then averaged together. As demonstrated in **Chart 2<sup>5</sup>** below, our targeted population currently leaves room for academic improvement:

<sup>2</sup> Arizona Department of Education. Accountability & Research, Data. *2017-18 Enrollment Report*. <http://www.azed.gov/accountability-research/data/>; last accessed May 2019.

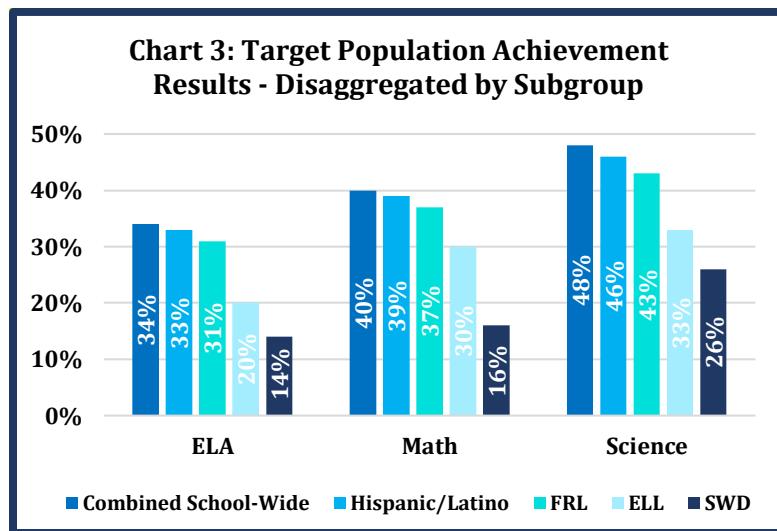
<sup>3</sup> Ibid.

<sup>4</sup> Native Hawaiian/Pacific Islander and Alaskan Native/Native American were less than 1% and thus not included in this chart.

<sup>5</sup> Arizona Department of Education. Accountability & Research, Data. *2017-18 AzMERIT Results*. <https://www.azed.gov/accountability-research/data/>; last accessed June 2019.



Based on these 2018 AzMERIT results, less than half of our target population is proficient in any subject area. What's more, these results worsen when disaggregated by ethnic demographics and student subgroups. Please see **Chart 3** below:



As displayed in **Chart 3** above, Hispanic/Latino students (which comprise 70% of our anticipated student population) performed worse than the combined average in all subject areas in our targeted community. Additionally, students qualifying for FRL services (81% of our anticipated population) performed even worse than both the combined average and Hispanic/Latino students. Needless to say, our targeted population has a demonstrated need for quality education for all students.

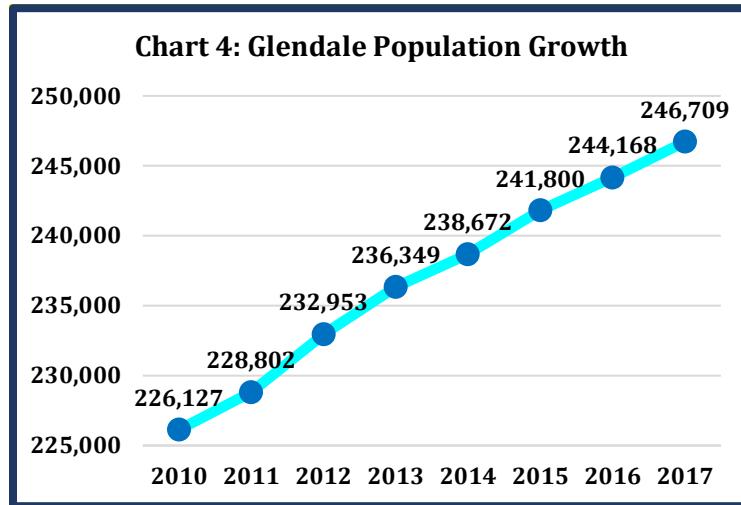
#### Growing Community

Lastly, as with many cities in the Phoenix area, Glendale is currently experiencing an increase in population. What was once an unpopulated and arid stretch of desert in the Arizona territory during the mid-1800s, Glendale today is the 5<sup>th</sup> most populous city in Arizona with more than

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<sup>6</sup> Ibid.

245,000 residents; and these numbers are only projected to rise. From 2010 to 2017, Glendale's annual growth rate has increased from .33% to 1.04% (see **Chart 4** below):



With this increase in population, the demand for quality schools will only increase. Families in the Glendale area need quality educational options where all students will succeed. Our proposed location has been carefully selected in order to best serve the interests and needs of our specific community by providing a high quality, rigorous, educational option to our students and families. Somerset Academy West Valley will prepare all its students, regardless of income status, race, or native language to "think critically, to problem-solve, and to understand and embrace diversity so that they contribute, both locally and globally, to an ever-changing society."<sup>8</sup>

**b) 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.**

In order to meet the identified needs of our target population, Somerset West Valley will replicate the successful Florida Somerset Academy school model and provide this quality educational choice to the families we intend to serve. The Florida Somerset Academy charter school network has demonstrated success with diverse, at-risk student populations, including Hispanic/Latino students as well as students qualifying for Free/Reduced Lunch (FRL) services. What's more, Somerset Florida's current student demographics reflect several similarities to that of our target population, as demonstrated in **Table 2** below:

**Table 2: Demographic Comparison**

	Target Population	Somerset Florida
Hisp./Lat.	70%	55%
White	17%	17%

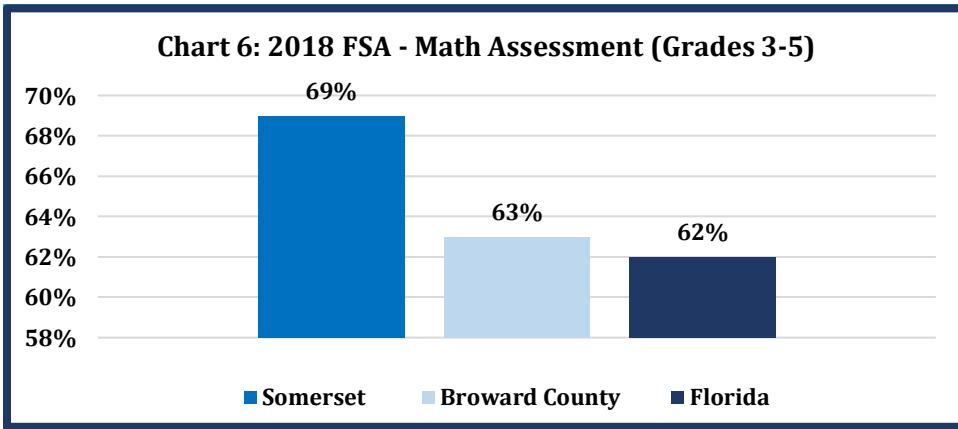
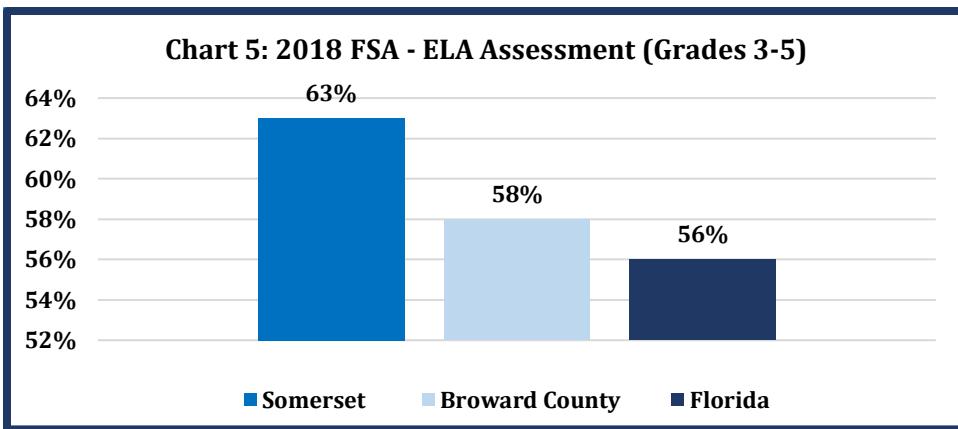
<sup>7</sup> Glendale Population. (2019-06-07). URL: <http://worldpopulationreview.com/us-cities/glendale/>; last accessed June 2019.

<sup>8</sup> Somerset Academy, Inc. *Core Beliefs*. URL: [https://www.somersetacademyschools.com/apps/pages/index.jsp?uREC\\_ID=215868&type=d&pREC\\_ID=421666&hideMenu=1](https://www.somersetacademyschools.com/apps/pages/index.jsp?uREC_ID=215868&type=d&pREC_ID=421666&hideMenu=1); last accessed June 2019.

<b>Multi-Racial</b>	2%	3%
<b>ELL</b>	16%	13%
<b>FRL</b>	81%	60%
<b>SWD</b>	11%	7%

The Somerset Academy model emphasizes positive, student-centered cultures that value equity, collaboration, and personalized learning, cultivating effective leaders, developing good character, and instilling in each child a desire to render service. In Florida, Somerset Academy schools have experienced great success in reducing the achievement gap among its students and multiple Somerset Academy campuses have been recognized by U.S. News as a top 100 school in Florida.<sup>9</sup> In 2013, the College Board and the National Association of Secondary School Principals recognized Somerset Academy for its successful creation of positive, student-centered school cultures that value equity, collaboration, foster the development of responsible, and self-directed life-long learners in a safe and enriching learning environment.

**Charts 5<sup>10</sup> and 6<sup>11</sup>** demonstrate Somerset's success in Florida based on the state's high-stakes test the Florida Standards Assessments (FSA):



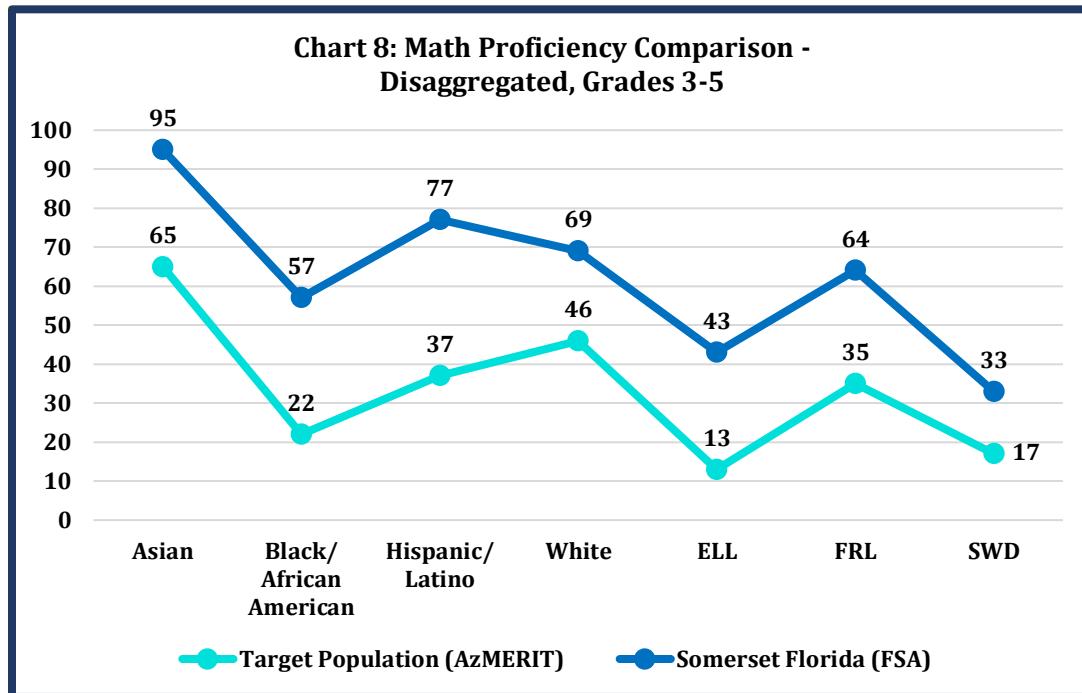
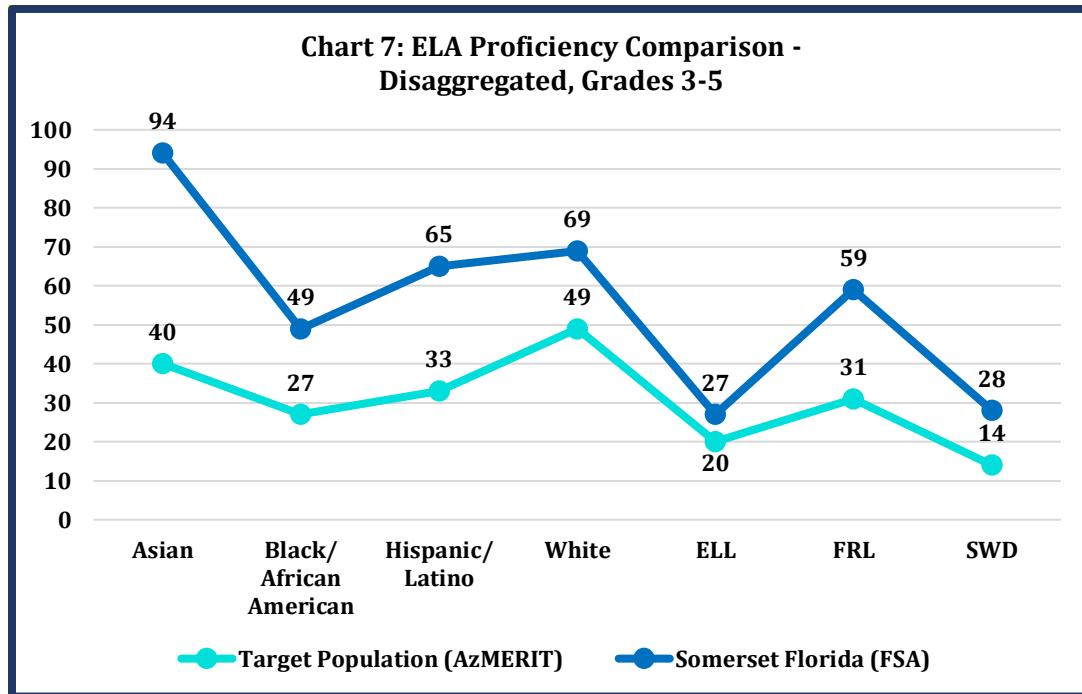
<sup>9</sup> US News & World Report. *Education: Best High Schools By State – Florida*.

<http://www.usnews.com/education/best-high-schools/florida/rankings>; last accessed June 2019.

<sup>10</sup> Data obtained internally through Somerset Florida network. Data is available upon request.

<sup>11</sup> Ibid.

The promise of the Somerset model providing high academic success for all students and families of Somerset West Valley's target population are even higher when comparing these FSA results with those of the AzMERIT.



**Charts 7 and 8** reflect disaggregated Math and ELA scores from the 2017-18 AzMERIT in Arizona and the 2017-18 FSA in Florida for our target population and the Somerset Florida network,

respectively. When examining the disaggregated data for various student demographics, Somerset's model has shown higher academic achievement than those currently obtained by schools in the Glendale area. We feel that given the similarities in population demographics as well as the demonstrated academic success from the Somerset Florida model, Somerset's program of instruction, as described in *Section A.3* will meet the needs of our target population by improving academic achievement for all our pupils and providing our community a quality elementary school.

Additionally, to ensure achievement gaps are closed and every student progress, the curriculum at Somerset West Valley will include research-based strategies that have proven effective for students at all levels, but especially for students that are educationally disadvantaged. Somerset West Valley's program of instruction aligns with the mission of the Somerset Academy network of schools because Somerset West Valley's innovative, challenging, equitable, high quality education will prepare students to be global citizens and obtain a competitive edge in the 21st century workforce. By providing students with a high quality academic education through Somerset West Valley's enrichment program, students will become technologically savvy and competent global citizens who are college and career ready. For further information regarding Somerset West Valley's program of instruction, please see section *A.3*

- c) 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.**

Somerset West Valley will implement an anti-discriminatory open admissions policy and initially open its doors to any and all students qualifying to attend a traditional public school in Kindergarten through the 3rd Grade during its first year of operation. Somerset West Valley intends to serve 264 students during its first year with the following enrollment configurations as displayed in **Table 3** below showing class size of 22 students:

<b>Table 3: Student-Teacher Ratio</b>			
<b>Grade</b>	<b>Number of Classes</b>	<b>Student:Teacher Ratio</b>	<b>Total Student Population</b>
<b>Kindergarten</b>	5	22:1	110
<b>1<sup>st</sup> Grade</b>	3	22:1	66
<b>2<sup>nd</sup> Grade</b>	2	22:1	44
<b>3<sup>rd</sup> Grade</b>	2	22:1	44

While these student-to-teacher ratios are close to the most recent findings for the national average<sup>12</sup>, Somerset West Valley believes in following one of their best practices to ensure students are not adversely affected by class sizes and that high educational outcomes are obtained for all its students. Somerset West Valley will implement a "neighborhood" school paradigm in their management structures to consistently maintain the feeling of a small school environment. By establishing this type of environment, "students can excel, parents and communities are involved in the process, and everyone is accountable for results."<sup>13</sup>

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<sup>12</sup> U.S. Department of Education, National Center for Education Statistics. (2018). *Digest of Education Statistics, 2016* (NCES 2017-094), Introduction and Chapter 2.

<sup>13</sup> Somerset Academy, Inc. *Best Practices*. <https://www.somersetacademyschools.com> ; last accessed June 2019.

**A.3**

# **Program of Instruction**

## **A.3 Program of Instruction**

### *a.) Core Curriculum Aligned with Educational Philosophy and AZ State Standards*

Somerset Academy of the West Valley (SAWV) is a replication of the highly successful Florida Somerset Academy charter school network that has demonstrated success with diverse, at-risk student populations, including English Language Learners (ELLs), migrant and homeless populations, students with Individual Education Plans (IEP), students qualifying for Free or Reduces Lunch (FRL), and students demonstrating exception and giftedness. The Somerset Academy model and educational philosophy emphasizes positive, student-centered cultures that value equity, collaboration, and personalized learning, cultivating effective leaders, developing good character, and instilling in each child a desire to render service. In Florida, Somerset Academy schools have experienced great success in reducing the achievement gap among its students and multiple Somerset Academy campuses have been recognized by U.S. News as a top 100 school in Florida.<sup>1</sup> In 2013, the College Board and the National Association of Secondary School Principals recognized Somerset Academy for its successful creation of positive, student-centered school cultures that value equity, collaboration, and fosters the development of responsible citizens.

SAWV aspires to provide students a program of instruction that is a well-rounded, academic curriculum in a ‘family-like’ environment that is rigorous, creatively stimulating, and nurturing. The educational philosophy of the school is anchored by the key areas of collaboration, communication, creativity and critical thinking. These four skills have been identified by Partnership for 21st Century Skills as “super skills” necessary to thrive in the future. The educational philosophy is further supported by Dr. Theodore Sizer’s Coalition of Essential Schools Common Principles. To create the school climate needed to effectuate the mission and vision, the Common Principles and the 21st Century “super skills” will permeate every aspect of Somerset Academy of the West Valley.

To incorporate all the aspects of the Somerset model and educational philosophy, all chosen curriculum is results oriented and allows for multiple types of assessments to measure both success and weakness of each student, aligning to the personalized learning philosophy. Teachers are given professional development as to the most effective way to implement it the curriculum, however, teachers are allowed and encouraged to enrich and enhance it. Although all curriculum selected is researched and has proven successful with similar student populations at other Somerset Network schools, it is still important for the professional teachers to adapt the curriculum to the needs of their specific students, this allows for the student-centered culture that each Somerset school utilizes to achieve success. Furthermore, curriculum in language arts, math, science, social studies, and even in special classes, will include, or teachers will enhance it, to include the key areas of collaboration, communication, creativity, and critical thinking.

SAWV’s English language arts, reading, science, and mathematics curriculum is aligned to the Arizona Academic Standards as established by the Arizona Department of Education. These standards provide a consistent, clear understanding of what students are expected to learn at each grade level. When possible, the school will utilize pre-aligned curriculum that has been adapted to the AZ Academic Standards, using state aligned publishers or correlation materials provided by the publisher. Support will be provided to all teachers by administration as well as master/expert teachers to make sure that Arizona State standards are completed in all core academic areas which will be demonstrated on the lesson plans. Additionally, both the scope and sequence and

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<sup>1</sup> <http://www.usnews.com/education/best-high-schools/florida/rankings>

instructional focus calendars that is created for each course will be based on the Arizona Academic Standards. This tool serves as the basis for lesson plan development to ensure that all benchmarks are addressed in a timely manner.

Students enrolled at the school may be at-risk, enrichment curricula to explicitly address the needs of the whole child (social-emotional, physical, and mental health) will be provided. Using a variety of professional resources, faculty will develop lessons to explore academic domains and character education necessary for developing self-efficacy and developing good character. These activities will be integrated throughout the regular school day, as well as in the before and after school programming.

Teachers will implement Common Board Configuration (CBC) which provides a uniform structured itinerary strategically located in the identical location in each classroom. The CBC helps students adapt to instructional routines and procedures. The CBC often includes: bell work, the Essential Question (EQ), the measurable objective, activities, and homework. The CBC is intended to provide a structured format of instructional activities to students and has no adverse bearing on the individual personalization of the student. For example, in the CBC components identified above, all students would be expected to follow the same agenda of instructional activities. However, through differentiated instruction, the students still receive the personalized education necessary to be successful. It is actually anticipated that the CBC will benefit the target population as many at-risk students lack structure.

#### *b.) Methods of Instruction*

The curriculum will include research-based strategies that have proven effective for students at all levels, and especially students that are at-risk and ELL. It is expected that students will master reading, writing, and verbal skills through continuous application of these strategies in all subject areas. For example, University of Kansas' Strategic Instruction Model includes the Paraphrasing Strategy; the Word Identification Strategy; the Frame (as well as CORE Reading including Explicit Phonics); and CORE Math, which are all research-based strategies that are effective for struggling learners. Pursuant to the educational philosophy of collaboration, teachers in working with the principal will determine the best research-based instructional strategies to implement at SAWV.

The school's educational program will also include learning methods and strategies which have proven successful in accelerating low-performing students. As noted in the CES Chart of Instructional Strategies in Section A.1, the key methods of instruction to Somerset's program that aligns with the Somerset philosophy to provide student centered education and personalized learning, while cultivating leaders includes using data that is collected continually to develop individualized plans for each student (focusing on developing weak areas and enriching areas that the student excelling in), targeted grouping/tutoring, direct instruction, scaffolding, cooperative learning, and information processing strategies. All teachers receive professional development in all of these instructional methods, which are necessary to make sure that the educational philosophy of Somerset is upheld and all students receive a high quality education.

In addition, the following strategies will also be implemented: appropriate assessments for learning (screening, progress monitoring and diagnostic)<sup>2</sup>; data-driven differentiated

<sup>2</sup> Institute of Education Sciences. (2009). *Using Student Achievement Data to Support Instructional Decision Making*. [https://ies.ed.gov/ncee/wwc/Docs/PracticeGuide/dddm\\_pg\\_092909.pdf](https://ies.ed.gov/ncee/wwc/Docs/PracticeGuide/dddm_pg_092909.pdf) Last Accessed February 2018.

instruction<sup>3</sup>; supplemental programs for pupil advancement<sup>4</sup>; pupil intervention plans; monthly structured teacher planning time<sup>5</sup>; grade level staff meetings and ongoing professional development<sup>6</sup>; tutoring for remediation and acceleration; a thematic approach to integrate core areas of study such as mathematics, reading, language arts, social studies; targeted interventions for struggling readers and students performing below grade level, and a standards-based curriculum based on Arizona Academic Standards

These collaborative teams are student-centered “educators who are committed to working collaboratively in ongoing processes of collective inquiry and action research in order to achieve better results for the students they serve.”<sup>8</sup> Collaborative teams will make collective decisions based on frequent formative assessments, observations and data to provide scaffolded instruction/interventions. The frequent formative assessments consist of a variety of methods that Somerset teachers will use to evaluate student comprehension, individualized learning needs, and academic progress as they are *in the process* of learning. These assessments which can consist of a teacher asking for student feedback on their understanding in the moment (thumbs up, thumbs down), actual student self-assessments, exit slips, admit tickets (used at the beginning of a lesson), and concept quizzes help teachers to identify students struggling to understand certain concepts and/or which AZ State Standard they may not have achieved so adjustments can be made to lessons, instructional methods, and academic support (such as target grouping) can be administered.

A focus on creativity and critical thinking is essential to prepare students for the future and more complex work environments (Partnership for 21st Century Skills). In order to maintain a learning environment where teachers can teach students to think more creatively and critically, SAWV will draw upon Sizer’s second principle “less is more, depth over coverage.” The school’s goals should be simple: that each student masters a limited number of essential skills and areas of knowledge. While these skills and areas will, to varying degrees, reflect the traditional academic disciplines (and meet Arizona State Standards), the program’s design should be shaped by the intellectual and imaginative powers and competencies that the students need (Sizer).<sup>9</sup> Curricular decisions will be guided through student mastery and achievement, rather than by effort to merely cover content. Thus, as indicated in principle six, students must demonstrate mastery in order to become critical thinkers. Students not demonstrating mastery or appropriate levels of competence, such as at-risk students, will be provided with intervention and support to assist in meeting grade level standards.

According to Sizer’s first common principle, students should “learn to use [their] mind well.” Learning to use one’s mind well can be taught by teaching creativity and critical thinking. Students will learn the skills of creativity: brainstorming, creating new ideas, analyzing, and reflecting. In addition, they will learn the critical thinking skills of inductive and deductive reasoning, analyzing,

<sup>3</sup> Doing What Works. (2009). *Using Data to Differentiate Instruction*.

[https://ies.ed.gov/ncee/wwc/Docs/PracticeGuide/wwc\\_rti\\_pg\\_rec02.pdf](https://ies.ed.gov/ncee/wwc/Docs/PracticeGuide/wwc_rti_pg_rec02.pdf), Last Accessed February 2018.

<sup>4</sup> English Language Learners. (2013). *Evidence Review Protocol for Interventions for English Language Learners, Version 2.2*.

[https://ies.ed.gov/ncee/wwc/Docs/ReferenceResources/wwc\\_ell\\_protocol\\_v2.2.pdf](https://ies.ed.gov/ncee/wwc/Docs/ReferenceResources/wwc_ell_protocol_v2.2.pdf), Last Accessed February 2018.

<sup>5</sup> National Center for Education and Evaluation and Regional Assistance. (2009). Assisting Struggling Students: *Response to Intervention*.

[https://ies.ed.gov/ncee/wwc/Docs/PracticeGuide/rti\\_math\\_pg\\_042109.pdf](https://ies.ed.gov/ncee/wwc/Docs/PracticeGuide/rti_math_pg_042109.pdf),

Last Accessed February 2018.

<sup>6</sup> Regional Educational Laboratory at Education Northwest. (2009). *New and Experienced Teachers in a School Reform Initiative*.

[https://ies.ed.gov/ncee/edlabs/regions/northwest/pdf/REL\\_2009082\\_sum.pdf](https://ies.ed.gov/ncee/edlabs/regions/northwest/pdf/REL_2009082_sum.pdf), Last Accessed February 2018.

<sup>7</sup> REL Southwest. (2007). *Reviewing the Evidence on How Teacher Professional Development Affects Student Achievement*.

[https://ies.ed.gov/ncee/edlabs/regions/southwest/pdf/rel\\_2007033\\_sum.pdf](https://ies.ed.gov/ncee/edlabs/regions/southwest/pdf/rel_2007033_sum.pdf), Last Accessed February 2018.

<sup>8</sup> Killion, J. and Roy, P. (n.d.). Becoming a learning school. National Staff Development Council (2009)

<sup>9</sup> Sizer, Theodore. <http://www.essentialschools.org>

evaluating, and synthesizing information to solve problems. High expectations and goals will be set for all students to learn the essential skills of creativity and critical thinking; however, “the means to these goals will vary as those students themselves vary (Sizer).” “The school practice should be tailor-made to meet the needs of every group or class of students (Sizer).” Teaching students to use their mind well at an early age prepares them for success in high school and beyond.

Furthermore, “using one’s mind well” will be a key principle for teachers and administration. This principle will be the foundation for the teachers and administration to coalesce collaboration, communication, creativity, and critical thinking into the culture of SAWV. In addition to the above-mentioned principles, the school will dedicate resources to teaching and learning (principle nine). “Ultimate administrative and budget targets [will] include student loads that promote personalization and substantial planning time for collective planning by teachers (Sizer).” The school’s annual academic goals include exceedingly high expectations and academic performance for all students while closing the achievement gaps between at-risk student subgroups. SAWV will close these gaps through data driven instruction, assessments, intervention, and a monitoring system to guide and ensure all students succeed.

In addition, the use of differentiation techniques reaches all learning levels. Differentiation is defined by the Training and Development Agency for Schools as ‘the process by which differences between learners are accommodated so that all students in a group have the best possible chance of learning’. Using differentiation techniques such as dialogue, support, and grouping, SAWV teachers will reach the vast array of student learners. Along with the Somerset Learning model, differentiation techniques will provide equitable teaching, remediation, and enrichment opportunities.

*c.) Rationale*

As explained in detail in sections A.2 and A.5, the targeted population for SAWV will represent a high rate of minority students and those that qualify for free/reduced lunch, a population that the network of Somerset schools often serves. All curriculum selected will support improving student achievement taking into account the demographics of the community as well as providing professional development to the teachers to effectively use the curriculum and adapt it specifically to the needs of the students that are being served.

*English Language Arts:* All of the curriculum is researched based and incorporates strategies for students reading at grade level or higher, support for students who are reading below grade level as well as support for English Language learners. ELA curriculum will be delivered in both print and digital resources to provide support to all students and support different learning styles. It is expected that students will master reading, writing, and verbal skills through continuous infusion of reading skills in all subject areas. Text which reflects the Arizona State Standards complexity bands will be used to teach reading skills and strategies. Lessons will support students by building a strong reading foundation, accessing complex text, finding and using text evidence, engaging in collaborative conversations, and writing to sources.

Reading will cover literature and informational texts. Students will read a variety of texts for a variety of audiences and purposes to examine how authors use evidence from the text to support their arguments, and analyze the strength of the author’s argument. They will read to determine a

theme or central idea of a literary text and how it is conveyed through specific details used by the author.

Students will write arguments to support claims with clear reasons and relevant evidence. Students will form an opinion, create a claim to support that opinion, research information to support their claim, and create essays that demonstrate their research. They will write narratives that develop real or imagined experiences or events using an event sequence that unfolds naturally and logically. Students will also get the chance to compare and contrast thematically-based texts in different genres; for example, stories and poems/historical novels and fantasy stories. They will write routinely over short and extended time frames for a variety of tasks, purposes, and audiences. The school will also include a strong language arts component with teachers using oral book lectures, poetry readings, roundtable discussions of novels, and creative and individualized writing instruction. Reading centers and differentiated instruction stations will be used daily to allow students to work independently and in small group settings in addition to the teacher being able to work closely with a small group of students, at their specific level, each day (aligning with the school's philosophy). Formative assessments and on-going monitoring of data including reading levels and reading comprehension is included in the curriculum map for ELA.

At the completion of the course, students will have achieved a year's worth of learning by mastering, at minimum, the objectives and concepts aligned to the Arizona Academic Standards in Reading and Language Arts. Curriculums that address all these components, have been successfully used in other Somerset networks schools, and could be used at SAWV are McGraw-Hill *Wonders* or Houghton Mifflin *Journeys* with supplemental materials such as i-Ready, Ready Reading Books, and writing Handbooks.

*Mathematics:* All math curriculum is researched based and aligned with NCTM Principles and Arizona Standards for Mathematics by grade level. Mathematics activities will also include mental math, math stories, math games, and competitions. A major area of study is the development of perspective in mathematics. In other words, we want the student to see connections between seemingly unrelated areas. Another major area of study is cooperation and communication. The student must learn to speak the language of mathematics and translate that language into clear language for the benefit of those who are not proficient in mathematics.

The math programs are specifically selected for their philosophy of inquiry and mathematical explanations required of all students. The curriculum is designed to support students and help them learn that they can be mathematical thinkers. There is an emphasis on reasoning and problem solving in all grades. Students will focus on computational fluency with whole numbers as a main goal in the elementary grades. Students will also work in the mathematical areas of rational numbers, geometry, measurement, data, and early algebra. Ongoing assessments will be utilized to ensure students understand core mathematical concepts and enrichment/remediation will be provided to meet the needs of individual students. These formative assessments will be used to adapt the curriculum as needed for the specific student in that classroom. Just like ELA, math will be instructed using targeted Math Centers (both independent and cooperate centers) to vary methods of instruction to address multiple learning styles.

Curriculums that address all these components, have been successfully used in other Somerset networks schools, and could be used at Somerset Academy West Valley are Houghton Mifflin Harcourt *Go Math* or Pearson *enVision* with supplemental materials such as i-Ready and Think Central.

*Science:* The researched based Science curriculum will prepare students to achieve the Arizona Academic Content Standards by incorporating an inquiry-based approach to learning of the central science themes: life, earth, physical, and process science. Students will be immersed in non-fiction text to connect other content areas into science. Additionally, students will visit the school's science lab weekly to participate in hands-on science experiments while keeping science journals to extend their learning. The Five 'E' Instructional Model will be used in science courses that takes student through the learning cycle by tapping into prior knowledge and experiences. The Five 'E' model consists of *Engage, Explore, Explain, and Elaborate/Extend*. Furthermore, open-ended questioning and encouraging students to pose their own questions is a method often used in science courses. Science assessments could include quizzes, exit slips, chapter exams and also science investigation (to apply science knowledge), and other hands on activities.

Curriculums that address all these components, have been successfully used in other Somerset networks schools, and could be used at Somerset Academy West Valley are Houghton Mifflin Harcourt *Science Fusion* or McGraw-Hill *Inspire* supplemental materials Scholastic News and Think Central.

*Social Studies:* The researched based Social Studies curriculum includes the study of related knowledge and modes of inquiry selected from history, the humanities, and the social sciences. Thematic units will integrate the various subjects and address key areas of social studies in alignment with Arizona Standards. Character Education components (respect, honesty, responsibility, self-control, tolerance, kindness, citizenship and cooperation) will be emphasized individually through thematic lessons and group projects.

Social Studies education will promote loyalty and love of country and community, and it will prepare students to participate intelligently in public affairs. Its component disciplines foster in students the knowledge and skills needed to understand current political and social issues. Social studies education will provide students with an understanding of the democratic principles and ideals upon which good citizenship is founded and an understanding of the world beyond their borders. Use of visuals such as graphs, maps, information and digital materials (Google earth) will be utilized in social science instruction. The School will also use periodicals as a literacy enrichment supplement and to incorporate data analysis daily by means of graphs and charts and will integrate Reading and Writing strategies within the Social Science Content using Literacy Standards for Social Science.

Curriculums that address all these components, have been successfully used in other Somerset networks schools, and could be used at Somerset Academy West Valley are Houghton Mifflin Harcourt *Intro to Social Studies* or *Kids Discover* with supplemental materials such as Scholastic News.

*Interdisciplinary Connections:* Curricular decisions will be guided by the aim of thorough student mastery and achievement rather than by an effort merely to cover content. As teachers build on interdisciplinary connections, students naturally begin to link information between and among courses, increasing the relevancy of skills and content in such courses.

*Differentiated and Standards-Based Instruction:* The School's ultimate goal is to provide a learning environment that will maximize the potential for student success. Teachers will use differentiated instructional strategies that connect with individual student's learning needs and all selected

curriculum will foster these instructional practices. Teachers will manage instructional time to meet the standards while providing motivating, challenging, and meaningful experiences for students to receive and process information in ways that require differentiation of experience. These instructional practices will include:

**\*Direct Instruction** (lecturing/modeling): this methodology will be used when teachers need to explain or demonstrate specific content and skills. This instruction is structured and based on mastery learning. Frequent Curriculum-based assessments help place students in ability groups for further differentiated strategies and identify students who require additional intervention.

**\*Scaffolding** - Teachers will identify the current developmental skills of individual students based on assessments and provide support structures to help students move to the next level. As the year goes on, the student becomes more adept at skills and at directing his or her learning, and becomes more autonomous.

**\*Cooperative Learning** – Teachers will guide small-group learning, to increase communication and team-building skills. It is based on grouping small teams of students heterogeneously according to ability, interest, background, etc. Some Cooperative learning activities will include Jigsaw II, STAD- Student Teams, or Group Investigation.

**\*Inquiry-Based Learning** - Based on the scientific method, this student centered strategy will require students to conduct investigations independent of the teacher, unless otherwise directed or guided through the process of discovery. Teachers will use this strategy in developing critical thinking and problem solving skills.

**\*Information Processing Strategies** - Teaching students "how to" process information is a key factor in teaching students how to strategically organize, store, retrieve, and apply information presented. Such strategies will include memorization, KWL, reciprocal teaching, graphic organizing, scaffolding, or webbing.

*Assessments Used to Support Pupil Achievement:* Select universal screeners and standardized assessments are used by SAWV to monitor students' academic progress, academic performance, and trend analysis. Commercially appropriate assessments, instruments, and curriculum will be used to assist in the development of daily lessons, weekly units of instruction, and short and long range instructional goals. SAWV will use one or more of the following assessments: iReady Reading and Math, DIBELS, Measure of Academic Progress (MAP), Galileo, The Arizona English Language Learner Assessment (AZELLA), ACT-Aspire, AzMerit, AIMS Science, AIMSweb, and Brigance to provide insight into further classroom instruction. Formative assessments will be used to regularly monitor student progress and used to adjust teaching methods to best serve the student population.

*Data Collection & Analysis:* SAWV teachers will screen students at the beginning of the year to determine current levels of academic performance. Once the data from these screeners have been analyzed and interpreted, instructional objectives will be determined. Along with state mandated assessments, a variety of data points will be collected. These data points will be assembled virtually and shared in grade-level meetings along with other student performance artifacts for the purposes of reporting individual student growth and progress for teacher and administrative use in creating meaningful and purposeful instructional activities to meet the needs of all students. SAWV will form data teams comprised of grade level teachers and groups of instructors who teach similar content such as math, ELA, science, and social studies. The purpose of these data teams is to assist in monitoring student progress. Data teams will compile progress-monitoring data on a quarterly basis (or during interim testing and when evaluating instructional impact) and will disaggregate the results for cohorts. Data teams will meet monthly to evaluate data and correlate to instructional

decision, review progress-monitoring data at grade level and classroom level to identify students and their academic levels; identify professional development to enhance students' achievement levels; collaborate, problem solve, share effective practices, evaluate implementation, make decisions, and practice new programs and skills; as well as facilitate the process of building consensus, increasing infrastructure, and making decisions about implementation.

*Instructional Changes and Interventions (Corrective Actions) based on Data:* Administrators and data teams will use data analysis to collaboratively develop instructionally focused calendars with timelines for addressing targeted strands as denoted in assessed benchmarks. Instructors will adjust their instruction, monitor student progress, and select appropriate classroom activities to work on student deficiencies and to guide differentiated instruction. This process supports improving student achievement through best practices, effective use of the curriculum, and using assessment data to drive instruction which will help the target population to be successful.

Students who are identified as academically "at risk" via the universal screening process and who are not already identified with an IEP, will be referred to Somerset Academy of West Valley Student Academic Behavioral Intervention Team (SABIT). The SABIT team will be comprised of a staff member from every general education grade level and the special education teacher or designee selected by the teacher. The SABIT team notifies the parent(s) that his/her/their child will be entering the SABIT program, which will provide interventions in all areas of the student's deficiencies. Once the student is identified, the SABIT team writes goals for the student in the area of deficiency, provides intensive interventions, and monitors weekly progress. The interventions and progress-monitoring tool provided would be interventions and tools that have been validated through research and determined effective by the SABIT team. The SABIT team reviews the student's progress according to the progress-monitoring data every four weeks and adjusts instruction when a student is not showing progress through trend analysis. If the student is not showing progress after every four weeks of data analysis, the teacher attempts a variety of intensive interventions and strategies designed to facilitate the child's learning within that classroom. Interventions may be intensified by providing more daily or weekly time on the intervention, providing interventions in a smaller group setting or individualized, or by compiling a combination of intervention that may work.

#### *d.) Achieving Outcomes*

To ensure achievement gaps are closed and every student progresses, the curriculum at SAWV will include research-based strategies that have proven effective for students at all levels, but especially for students that are at-risk and ELL. The School's program of instruction aligns with the mission of the Somerset Academy network of schools because SAWV's innovative, challenging, equitable, high quality education will prepare students to be global citizens and obtain a competitive edge in the 21st century workforce. SAWV's learning model will provide targeted support for each student to meet the Arizona Academic Standard requirements. Students will succeed when provided the correct scaffolded learning coupled with the appropriate amount of support, whether it be through the use of targeted level technology such as i-Ready or provided by a teacher in the centers/stations previously explained. With the research based curriculum, research based and proven instructional strategies, proven methods of data analysis to create individual student learning plans, and over 20 years of Somerset Inc.'s successful track record, SAWV will improve student achievement in the target population.

**A.3.1**

## **Mastery and Promotion**

## A.3.1 Mastery and Promotion

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*A.3.1.a 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.*

### **Criteria for Placement**

**K-1 Placement:** The school will follow admission requirements in accordance with A.R.S §15-821. Students must turn the age of five (5) on or before September 1<sup>st</sup> of the school enrollment year to enter kindergarten. Grade 1 students must turn the age of six (6) on or before September 1<sup>st</sup> of the school enrollment year and shall have successfully completed the kindergarten program or have otherwise met the criteria for admission or transfer in a manner similar to that applicable to other grades.

**Grades 2-5 Placement:** Students academic records must document/indicate successful completion of and promotion from the previous grade level. Grade placement of students registering from within the state, other states, non-public schools, home education programs, or other countries, will be determined by the principal of the receiving school.

**Placement Decisions for Students with Disabilities (SWD):** The information contained in the IEP for each student will form the basis for the placement decision. Placement decisions will be made based on each student's abilities and needs. The general education setting will be the first consideration when determining placement for SWD.

**Placement for English Language Learners (ELLs):** Instructional time for ELLs will equal the time non-ELLs are required to participate in the regular English language arts/reading program.

### **Criteria for Promotion**

**Student Progression in K-5:** Each student in grades K-5 must meet specific levels of performance in reading, writing, mathematics, science and social science for progression from one grade to another. In order to determine if a student has achieved proficiency to be promoted to the next grade level, SAWV will analyze the student's performance on formative and comprehensive assessments and through AzMERIT assessments. There are four ways in which a student may obtain promotion:

- ◆ Mastery: 90% in all core subjects
- ◆ Proficiency: 70% in all core subjects while displaying grade-level growth
- ◆ Partially proficient: 70% in all core subjects without displaying grade-level growth. May be promoted with conditions, which may include special projects, summer school or other supplemental services.
- ◆ Not meeting proficiency: 65% in all core subjects and 88% or better in attendance. If the student can pass proficiency tests, they may be promoted with conditions. SAWV will also provide the appropriate interventions and progress monitoring through the school's MTSS/RtI process.

**Successful Progression - Retained 3<sup>rd</sup> Grade Students:** In accordance with A.R.S §15-701(2)(c), the School will provide students who were retained in grade 3 with evidence-based intervention and remedial strategies to remediate the identified areas of reading deficiency which includes a minimum of 90 minutes of daily, uninterrupted, scientifically research-based reading instruction

which includes phonemic awareness, phonics, fluency, vocabulary, and comprehension.

**Corrective Action** - SAWV will use RtI/MTSS framework as prevention oriented approach to linking assessment and instruction. Using real-time data from frequent assessments, the School will provide the necessary individual, classroom and/or school-wide intervention programs which include: requiring students to attend specific targeted tutoring during and after school; providing for supplemental intervention programs and support within the respective core course classrooms through academic coaching, lesson modeling, computerized intervention programs and pull out services (as needed).

Progress resulting from the academic support (interventions, tutoring, intensive reading/mathematics courses, etc., as applicable) will be monitored using i-Ready Diagnostic Test. All students, who exhibit significant risk, will be given intensive intervention as soon as that risk is identified and provided support. SAWV will implement the school's Literacy Plan for Students with Reading Deficiencies in order to meet the requirements.

**At the school-wide level:** The Instructional Leadership team will review school-wide data to determine school-wide areas in need of improvement. Faculty and Staff will work collaboratively through PLCs (by content area and grade level) to create the action plan including identifying strategies that were successful and strategies/curriculum/ and intervention processes that ought to be revised.

**At the Classroom Level:** The administration would determine (based on classroom/teacher data reports, observations and classroom walk-throughs) which teachers need additional support and provide professional development and or mentoring support accordingly. A plan for the teacher/class would be implemented and documented through the teacher's lesson plans. Teachers would be expected to implement corrective action/change in intervention or content in the classroom with support from the administration.

**At the Sub-group, or individual student level:** The student's teachers and administrative team would review data (individual assessments/IEP or ELL Plans) and determine where instruction or interventions needs to be modified. Changes in intervention plan and/or varied strategies to target individual students' needs would be identified and communicated to the parents and documented by the teacher and in the student's ELL or IEP plan if applicable.

*A.3.1.b 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.*

#### **Process for Promotion**

Somerset is committed to keeping an open line of communication between the school and the parents. Promotion and applicable graduation criteria is communicated in writing to parents at the beginning of the year through the school's curriculum bulletin. The curriculum bulletin, as well as the parent/student handbook, will be given to parents at time of registration and will be shared through multiple parent orientation workshops, at open house at the beginning of each school year, and posted on the School's website. Furthermore, the school will notify parents in writing at any time during a grading period when it is apparent that the student may fail or is performing unsatisfactory work in any course, which may adversely affect the grade assignation and drop the student below a C average.

Additionally, ongoing communication between the School and parents will be maintained through on-line reporting systems such as web-based grade book. Progress reports, parent conferences, and other forms of written and oral communication will be used. The school will also host open house meetings, parental workshops, and coordinate other appropriate methods of communication with parents/guardians, as necessary. The school will make every effort for communication to take place in the home language for those students from homes where a language other than English is spoken.

Specifically, the School will ensure communication with students/parents occur as follows:

- ◆ Written Notices & Email - Parents will be notified, in writing, at any time during a grading period when: it is apparent that the student is doing unsatisfactory work; when course or grade assignments drop abruptly or significantly; if a student is in jeopardy of failing a course, and/or if a student is in jeopardy of not meeting promotion criteria. Parents will also be notified in writing when a student is receiving instruction in an accelerated class. A copy of this notification will be placed in the cumulative record;
- ◆ Phone & In Person – Teacher and/or administrator will call parents with updates or concerns and/or request in-person conference. The school will also host open house at the beginning of the school year wherein they will make parents aware of policies, procedures, and how to request conferences. Parent conferences will be held as requested by parent or as deemed necessary by teacher or administration.
- ◆ Interim Progress Reports - Parents receive an interim report between grading periods, which indicate student progress by course and contains academic, behavioral and attendance data.
- ◆ Parent Portal/ Online Gradebook – Parents have access to all the child's grades/assignments in all subjects.
- ◆ Data Reports - Parents and students will be notified of student performance and progress through data reports (PM Tracking logs) Quarterly i-Ready and MYA Reports of student individual performance and progress.
- ◆ School Grades - (School Accountability Reports) will be made available to stakeholders and the community at-large via the School website and other means. The school will provide parents with assessment results on a yearly basis for each year their child participates in the state-mandated assessments. Following the release of assessment results, school personnel will disseminate the information to parents individually and following all student confidentiality procedures.

Baseline and Interim Assessments include a school-based assessment for Kindergarten upon registration and i-Ready Diagnostic screening to establish baseline at the beginning of the school year (K-5) in Reading and Mathematics and AIMS in Science (Grades 4 and 5). These will help to determine students' strengths and weaknesses on Arizona Academic Standards. Any available data from the student's previous school year (such as coursework, report card grades, Standardized assessments results, SAT-10/Arizona Academic Standards/AzMERIT/Galileo and any applicable EOC's, teacher recommendation, etc.) will assist to establish determine placement including advanced/gifted classes.

The i-Ready Diagnostic will be administered 3 times per year to determine student needs and as an ongoing progress-monitoring tool to determine whether students are on track to achieve end-of-year targets in reading and mathematics. This assessment will also be used to maintain compliance with ARS §15-701 as the universal screener for students in grades K-3. Mid-Year Assessments (MYA) administered in the second semester of the school year (as described above for 3-5) will be

used to target instruction on Arizona Academic Standards in ELA, Mathematics, and Science, as well as to monitor ongoing student progress.

MYA results reports (generated at the student, classroom, school level) will be used for differentiation of instruction, progress reporting, and as a measure for progress with the academic performance framework. Additional evaluation methods to monitor student progress throughout the school year include:

- ◆ Teacher-generated quizzes and Assessments Rubric
- ◆ Textbook adopted assessments (Wonders/i-Ready)
- ◆ Quarterly Examinations, projects/investigations
- ◆ Portfolios and presentations
- ◆ UDL Design Framework (adaptations for ELL and SWD students)

*A.3.1.c Present a rationale for the selected criteria and conditions that guide the grade level promotion decisions.*

SAWV has established the criteria and conditions for mastery and promotion based on a variety of assessments. We believe students can master the academic skills necessary when provided an engaging curriculum, multi-sensory learning, and the opportunities to improve their learning over time. Because of this, SAWV will utilize percentage and rubric scores of end of lesson assessments, formative assessments, and comprehensive summative assessments in addition to academic growth on benchmark assessments to determine proficiency of a skill or concept.

If a student is not demonstrating mastery based on the criteria outlined above, that student will participate in specific, school-based interventions, as described above. The rationale for providing interventions to students who have been identified as not mastering content is grounded in the idea that by identifying students who are struggling before they fall far behind their peers and providing them with appropriate interventions as soon as the need has been identified, the students will receive the appropriate amount of time and favorable learning conditions to master the content as well as prevent misidentification of students for special education services.

*A.3.1.d Describe the process for student retention.*

#### **Process for Retention**

Teachers will review student performance to determine which, if any, students are not meeting the aforementioned progression criteria. If it is determined that a student is consistently performing below proficiency level (65%) in both reading and math, a meeting will be scheduled promptly to discuss criteria for retention, the specific areas of deficiency, and to review applicable assessment scores and data. Together, the parents/guardians, teacher(s), and Principal will develop an individual intervention plan which may include attendance, behavioral contracts, specific school-based interventions, and/or specific strategies that parents/guardians can utilize at home to assist students in reading and math achievement. The teacher will then document the student's progress, execution of the action steps outlined in the Retention Prevention Plan, and any notable changes over the course of eight weeks.

In May, teachers will review the final progress of all students with intervention plans. This progress will be documented along with the teacher's recommendation to promote or retain and be

submitted to the School Principal. The School Principal and SPED Director (for students receiving SPED services) will review the documentation looking for exceptions to the promotion criteria. The exceptions may include but are not limited to:

1. The student's lack of progress being due to qualifying for SPED services
2. The student's English proficiency as measured by the AZELLA test being the reason for the lack of progress
3. The student not approaching expected proficiency but making more than one and a half years' growth in measured subject areas. Proof of growth could come from multiple credible sources such as bi-weekly assessments, state mandated assessments, etc.
4. Other extraordinary circumstances such as illness, hospitalization, death of a family member, etc.

If any of these exceptions apply, the School Principal will act accordingly on the student's behalf and recommend promotion. If a student does not meet the aforementioned criteria and does not qualify for an exception, the School Principal and SPED Director (for students receiving SPED services) will recommend retention for the student. The School Principal will host an end-of-year conference for the parents/guardians, students, teacher, and SPED Director (for students receiving SPED services). The action steps from the intervention plan will be reviewed and compared against the parent/guardian and student's alignment and execution of the steps and the subsequent outcomes. After the review, the School Principal will give the recommendation for retention. Final decisions regarding retention must be made by the student's parent/guardians. Their decision will be documented along with any other relevant documentation in the intervention plan.

**Retention in Third Grade** In compliance with ARS §15-701, SAWV will require a student not be promoted from the third grade if the student's reading scores are below the third grade level on the AzMERIT statewide assessment. If a student in grades K-3 is substantially deficient in reading, SAWV will communicate with the student's parents in writing. The notification will include a description of the student's specific needs, the current services being provided, any available supplemental instructional services at the school, strategies to use at home, and information about the possibility of retention if the student does not obtain a sufficient reading score on the AzMERIT exam at the end of third grade. An intervention plan will also be developed. However, the student will be promoted from third grade if:

- ◆ AzMERIT assessment data is not received by the end of the school year (the student will still receive interventions if interim assessments did not demonstrate sufficient reading skills);
- ◆ The student is an English learner and has had fewer than two years of English language instruction;
- ◆ The student is in the process of a special education referral, has been diagnosed as having a significant reading impairment (including dyslexia), or has a disability and the IEP team and parents/guardians agree that promotion is appropriate;
- ◆ The student has demonstrated or subsequently demonstrates sufficient reading skills or adequate progress towards sufficient reading skills of the third grade reading standards as evidenced through a collection of approved reading assessments;
- ◆ The student receives intervention and remedial services and demonstrates adequate progress in reading skills.

**A.4**

# **School Calendar and Weekly Schedule**

## A.4 School Calendar and Weekly Schedule

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- a) *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.*
- b) *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.*
- c) *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.*
- d) *School calendar clearly demonstrates compliance with A.R.S. §15-341.01.*
- e) *Provide a rationale for the selected weekly schedule that clearly supports improving pupil achievement in the target population.*
- f) *Identify professional development opportunities consistent with Area IV of the Academic Systems Plan.*

Somerset Academy of the West Valley has developed a proposed school calendar in accordance with ARS 15-901 and 15-341.01. The proposed calendar meets the requirements for 180 days of attendance and exceeds the statutory requirements for instructional hours for each age group.

Grade Level	State Required Instructional Hours	SOMAZ Instructional Hours
Kindergarten	356	990
1st-3rd Grade	712	1,076
4th-5th Grade	890	990

Somerset West Valley will operate five days per week, with Fridays as early release days. Students will attend from 8:00 am to 3:00 pm on regular days and from 8:00 am to 12:20 pm during early release days. The following schedule demonstrates a sample daily schedule for elementary school classrooms. The Principal and Faculty of the school will further refine this schedule to meet the needs of various grade levels and future school growth.

Kindergarten- 5 <sup>th</sup> Grade Sample Schedule	
8:00 -8:30 am	Opening and Warm Up-Mathematics and Reading
8:30-9:30 am	Mathematics
9:30- 9:45 am	Recess
9:45-10:30 am	Reading
10:30-11:15 am	Writing Workshop
11:15-11:45 am	Lunch

<b>11:45-12:00 pm</b>	<b>Recess</b>
<b>12:00-12:50 pm</b>	<b>Specials (PE, Music, Art, Spanish, Etc.)**</b>
<b>12:50-1:35</b>	<b>ELA/Inquiry ELA/ Project Based Time</b>
<b>1:35-2:35 pm</b>	<b>Social Studies/ Science</b>
<b>2:35-3:00 pm</b>	<b>Literature</b>
<p><b>This schedule will change on a daily basis. Specials will be held at different times to accommodate for Common Preparation Periods so that Grade Levels can have common planning time.</b></p> <p><b>(6 hours of instructional time)</b></p>	

<b>Kindergarten-5<sup>th</sup> Grade Early Release Sample Schedule</b>	
<b>8:00 -8:30 am</b>	<b>Opening and Warm Up-Mathematics and Reading</b>
<b>8:30-9:30 am</b>	<b>Mathematics</b>
<b>9:30- 9:45 am</b>	<b>Recess</b>
<b>9:45-10:30 am</b>	<b>Reading</b>
<b>10:30-11:15 am</b>	<b>Writing Workshop</b>
<b>11:15-11:45 am</b>	<b>Lunch</b>
<b>11:45-12:20 pm</b>	<b>ELA/Inquiry ELA/ Project Based Time/ Integrated Social Studies and Science</b>
<b>(3 hours and 35 minutes of instructional time)</b>	

The school envisions a team environment where subject matter experts collaborate to develop lessons and activities that maximize learning and to facilitate the Somerset educational philosophy and educational strategies. As found in the Elementary schedule, common planning time will be a key element in supporting the development of a successful Somerset Curriculum Model.

The basic learning environment at Somerset West Valley will support the school's mission in that the educational program is designed to serve all students and accommodate diverse needs and learning styles. Teachers will begin the school year with a thorough review of their students' previous year data which includes previous course grades and AzMERIT scores (grades 3-5). The school will also administer a pre-test assessment for Reading and Mathematics using i-Ready diagnostic assessments at the beginning of each school year. This will allow the School to gather the most current data in order to determine areas of students' strengths and weakness, to make accurate placement decisions and to provide differentiated instruction and appropriate interventions/support services. The educational program will be structured in accordance with required minutes of instruction per class and grade level with fidelity to course content and course descriptions. Also, we believe that students learn best in a personalized small school setting.

*Elementary Program Design*

Subject	Grade	Program Design	Interventions for Struggling Students/ELL/SWD
<b>ELA Reading</b>	K-5	90 minutes consecutive, uninterrupted, daily instruction	Additional 30 minutes minimum for Tier 2. For Tier 3: Interventions may be modified in art, music and social science. * ELL and SWD have the same instructional time.
<b>Writing</b>	K-5	150 minutes weekly (minimum 30 minute instructional blocks)	
<b>Math</b>	K-5	60 minutes consecutive, uninterrupted, daily instruction	Interventions provided within the instructional time allotted for math. SWD have the same instructional time
<b>Science</b>	K-1	60 minutes per week	SWD have the same instructional time
	2-5	150 minutes per week including science labs minimum once a week	SWD have the same instructional time
<b>Social Science</b>	K-1	60 minutes per week	Individual intervention for Tier 3 students may be modified in Social Science
	2-5	150 minutes per week	SWD have the same instructional time
<b>Art</b>	K-5	60 minutes per week	Individual intervention for Tier 3 students may be modified in Art including students with disabilities. A minimum of 30 minutes of instruction per week in Art must be provided.
<b>Music</b>	K-5	60 minutes per week	Individual intervention for Tier 3 students may be modified in Music including students with disabilities. A minimum of 30 minutes of music instruction must be provided.
<b>Physical Education</b>	K-5	150 minutes per week	Time requirements may be modified for students requiring intervention in Tiers 2 and 3 with a minimum of 60 minutes of PE required per week.
<b>Recess</b>	K-5	30 minutes daily	

<b>World Languages</b>	K-5	150 minutes per week (Spanish)	HLA: (Spanish- S) constitutes an alternative Language Arts program and may represent the comparable time required for intervention for ELLs. ELL Committee decides appropriate interventions for ELLs. The IEP Team can consider the provision of CCHL for ELL students with disabilities.
<b>Home Language Arts for ELL</b>	K-5	(Spanish-S) - 150 minutes per week for all ELLs.	
<b>Intensive Acceleration Course</b>	3-4*	90 minutes of daily intervention incorporating Science and Social Science and opportunities to master Grade 4 AZ Standards in other core subject areas.	* intended for retained 3rd grader who scored in the lowest 20% on the AZ MERIT and for 4th graders who were promoted due to Good Cause #6.

*NOTE\* - The School will address the specific needs of learners via an individualized approach for the placement of students in courses. The School will consider test scores, academic history, state and district requirements, and teacher recommendations when*

#### *Professional Development Days*

The school plans to schedule nine days of professional development, non-contact days, before and throughout the school year. In order to train staff and establish expectations for collaboration and competency, most of these days will be scheduled prior to the beginning of each school year. Additionally, every Friday will be early release days for students that will be used for professional development, non-contact days.

Prior to school opening, there are two phases of teacher preparation, one addressing the unique needs to new teachers, and the other addressing returning teachers.

- **New Teacher Induction Program** (all teachers will participate prior to the first school year): provides new educators with tools for entering the field such as:
  - Classroom management techniques, strategies for effective communication with parents and how to access student data and gradebooks.
  - These teachers will also be provided with a Somerset orientation to help acquiesce them to the policies and procedures of their specific campus. These teachers meet one week prior to returning faculty.
- **Pre-Service Week:** The week prior to opening of schools, in accordance with the district calendar, the School will have a gamut of professional learning opportunities for the faculty and staff to prepare for the upcoming school year, which will include, but not limited to the following topics/presentations:
  - Data-Driven Decision-Making – Administrators and staff collaborate to analyze, extrapolate and disaggregate school data from a variety of sources and to use this data to create effective school improvement plans and increase student achievement.
  - Student Support – The faculty and staff related to student support provide guidance and procedures on the following topics:
    - Exceptional Student Education – Teachers are guided through the IEPs of their students and are made aware of the accommodations required to address the needs of each learner.

- ESOL – Teachers are provided with guidance and resources to help address the unique academic and social needs of English Language Learners.
  - RtI/MTSSS Framework – Staff learn to initiate and address the RtI model to meet the academic and behavioral needs of all students.
- Curriculum Implementation by Subject/Specialty – Teachers will participate in individual department trainings related to curriculum implementation, Arizona Standards and AzMERIT implementation, with special emphasis on incorporating digital resources.
- Other:
  - School Literacy Plan – Teachers will be exposed to the School's literacy plan with specific strategies on how to differentiate and individualize instruction.
  - Technology Trainings: Beginner/Intermediate. Teachers are exposed to the resources and instructional implications of utilizing technology that will be used school wide as well as technology within the classrooms.
  - Safety and Security – Training will instruct staff on daily safety procedures, and how to prevent and protect the school and students, to handle emergency situations, and to recognize potential threats in accordance with the school safety plan.
  - School Discipline Plan – Classroom-based discipline plans are discussed and approved; school-wide discipline procedures are outlined and clarified.

During early release Fridays, professional development will be guided by data analysis and teacher input, and will consist of best practices in areas such as: Data Chats, Small Group Instruction/Centers to Maximize Learning, Innovative Projects-Based Learning, Cross-Curricular Writing Strategies, and Differentiated Instruction to Increase Student Achievement.

- Faculty Meetings K-5: 1st Friday of the Month
- Curriculum Council Meetings: Second Tuesday of the month after school
- SAC Meeting: 2nd Friday of every month
- Department Meeting: 3rd Friday of the month
- Grade Level Meeting: 4th Friday of the month

Somerset West Valley is committed to providing training in STEM and Blended Learning Education Methods, curriculum, content mastery, standards, classroom management, and leadership development. Somerset West Valley will also support the professional development needs of all professional staff by subsidizing college classes through its community partnership with Grand Canyon University, facilitating the attainment of continuing education credits, and offering on-site trainings. Staff members will participate in school-initiated and other relevant and necessary workshops for professional development. A member of the administrative team will oversee, coordinate, assist and monitor the staff development process. Teachers will attend relevant local and national conferences and serve as the trainer to the remainder of the staff upon return to the school. The professional development offered to teachers will align with student achievement data, curriculum, instructional personnel needs, School Improvement Plans, and annual school reports.

The school-wide professional development plan will be ongoing, sustained, inquiry-based learning that occurs at least weekly throughout the school year. This type of professional learning provides focused, deep learning that builds upon prior learning resulting in positive changes in practice and increased student learning. A needs assessment can be conducted on a whole school level, or by grade, subject, team, PLC or individual levels. It should be reviewed regularly and updated to reflect staff learning and changes in student data.

**Somerset Academy of the West Valley  
Proposed 2020-2021 Calendar**

August 2020						September 2020						October 2020																	
M	T	W	TH	F	S	M	T	W	TH	F	S	M	T	W	TH	F	S												
<b>3</b>	4	5	6	7		<b>1</b>	2	3	4			<b>5</b>	6	7	8	9													
10	11	12	13	14		<b>7</b>	8	9	10	11		12	13	14	15	16													
17	18	19	20	21		<b>14</b>	15	16	17	18		19	20	21	22	23													
24	25	26	27	<b>28</b>		21	22	23	24	25		26	27	28	29	<b>30</b>													
31						28	29	<b>30</b>																					
November 2020						December 2021						January 2021																	
M	T	W	TH	F	S	M	T	W	TH	F	S	M	T	W	TH	F	S												
2	3	4	5	6		1	2	3	4			4	5	6	7	<b>8</b>													
9	10	<b>11</b>	12	13		7	8	9	10	11		11	12	13	14	<b>15</b>													
16	17	18	19	20		14	15	16	17	18		18	19	20	21	22													
23	24	<b>25</b>	26	27		21	22	23	24	25		25	26	27	28	<b>29</b>													
30						28	29	30	31																				
February 2021						March 2021						April 2021																	
M	T	W	TH	F	S	M	T	W	TH	F	S	M	T	W	TH	F	S												
1	2	3	4	5		1	2	3	4	<b>5</b>		5	6	7	8	9													
8	9	10	11	12		8	9	10	<b>11</b>	12		12	13	14	15	16													
<b>15</b>	16	17	18	19		15	16	17	18	<b>19</b>		19	20	21	22	23													
22	23	24	25	26		22	23	24	25	26		26	27	28	29	<b>30</b>													
29						29	30	31																					
May 2021						Significant Dates						Staff Development Days																	
M	T	W	TH	F	S	Aug. 3 First Day of School						August 28, January 15, May 7																	
3	4	5	6	<b>7</b>		Sept. 7 Labor Day						School Not in Session																	
10	11	12	13	<b>14</b>		Oct. 5-9 Fall Break						Parent/Teacher Conferences																	
17	18	19	20	<b>21</b>		Nov. 11 Veterans' Day						September 30—October 2, January 29																	
24	25	26	<b>27</b>	28		Nov. 25-27 Thanksgiving Break						Early Dismissal Days (Every Friday)																	
31						Dec. 18—Jan. 1 Winter Break						May 21 Last Day of School																	
<b>Quarters</b>						Jan. 18 Martin Luther King Jr. Day						SOMERSET ACADEMY																	
Quarter 1: August 3– October 2 (43 days)						Feb. 16 Presidents' Day						TEACHING IN HONOR																	
Quarter 2: October 12—December 18 (46 days)						Mar. 8-12 Spring Break																							
Quarter 3: January 4—March 5 (42 days)						May 21 Last Day of School																							
Quarter 4: March 15—May 21 (49 days)																													
CLASSES ARE IN SESSION ON BOLD DATES																													
STATE TESTING DATES: TBA																													

# Somerset Academy West Valley

## Proposed 2020-21 Calendar

August 2020					
M	T	W	TH	F	S
3	4	5	6	7	
10	11	12	13	14	
17	18	19	20	21	
24	25	26	27	28	
31					

September 2020					
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7		8	9	10	11
14	15	16	17	18	
21	22	23	24	25	
28	29	30			

October 2020					
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12	13	14	15	16	
19	20	21	22	23	
26	27	28	29	30	

November 2020					
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9	10	11	12	13	
16	17	18	19	20	
23	24	25	26	27	
30					

December 2020					
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7	8	9	10	11	
14	15	16	17	18	
21	22	23	24	25	
28	29	30	31		

January 2021					
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11	12	13	14	15	
18	19	20	21	22	
25	26	27	28	29	

February 2021					
M	T	W	TH	F	S
1	2	3	4	5	
8	9	10	11	12	
15	16	17	18	19	
22	23	24	25	26	

March 2021					
M	T	W	TH	F	S
1	2	3	4	5	
8	9	10	11	12	
15	16	17	18	19	
22	23	24	25	26	
29	30	31			

May 2021					
M	T	W	TH	F	S
3	4	5	6	7	
10	11	12	13	14	
17	18	19	20	21	
24	25	26	27	28	
31					

### Quarters

Quarter 1: August 3– October 2 (43 days)

Quarter 2: October 12—December 18 (46 days)

Quarter 3: January 4—March 5 (42 days)

Quarter 4: March 15—May 21 (49 days)

### Significant Dates



Aug. 3 First Day of School



Sept. 7 Labor Day



Oct. 5-9 Fall Break



Nov.11 Veterans' Day



Nov. 25-27 Thanksgiving Break



Dec. 18 —Jan. 1 Winter Break



Jan. 18 Martin Luther King Jr. Day



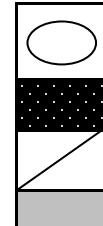
Feb. 16 Presidents' Day



Mar. 8-12 Spring Break



May 21 Last Day of School



Staff Development Days

August 28, January 15, May 7



School Not in Session

Parent/Teacher Conferences

September 30—October 2 , January 29



Early Dismissal Days (Every Friday)



**CLASSES ARE IN SESSION ON BOLD DATES**

## Exhibit Weekly Schedule

Somerset West Valley will operate five days per week, with Wednesdays as early release days. Students will attend from 8:00 am to 3:00 pm on regular days and from 8:00 am to 12:20 pm during early release days. The following schedule demonstrates a sample daily schedule for elementary school classrooms. The Principal and Faculty of the school will further refine this schedule to meet the needs of various grade levels and future school growth.

Kindergarten- 5 <sup>th</sup> Grade Sample Schedule	
<b>8:00 -8:30 am</b>	<b>Opening and Warm Up-Mathematics and Reading</b>
<b>8:30-9:30 am</b>	<b>Mathematics</b>
<b>9:30- 9:45 am</b>	<b>Recess</b>
<b>9:45-10:30 am</b>	<b>Reading</b>
<b>10:30-11:15 am</b>	<b>Writing Workshop</b>
<b>11:15-11:45 am</b>	<b>Lunch</b>
<b>11:45-12:00 pm</b>	<b>Recess</b>
<b>12:00-12:50 pm</b>	<b>Specials (PE, Music, Art, Spanish, Etc.)**</b>
<b>12:50-1:35</b>	<b>ELA/Inquiry ELA/ Project Based Time</b>
<b>1:35-2:35 pm</b>	<b>Social Studies/ Science</b>
<b>2:35-3:00 pm</b>	<b>Literature</b>
<b>This schedule will change on a daily basis. Specials will be held at different times to accommodate for Common Preparation Periods so that Grade Levels can have common planning time. (6 hours of instructional time)</b>	

Kindergarten-5 <sup>th</sup> Grade Early Release Sample Schedule	
<b>8:00 -8:30 am</b>	<b>Opening and Warm Up-Mathematics and Reading</b>
<b>8:30-9:30 am</b>	<b>Mathematics</b>
<b>9:30- 9:45 am</b>	<b>Recess</b>
<b>9:45-10:30 am</b>	<b>Reading</b>
<b>10:30-11:15 am</b>	<b>Writing Workshop</b>
<b>11:15-11:45 am</b>	<b>Lunch</b>
<b>11:45-12:20 pm</b>	<b>ELA/Inquiry ELA/ Project Based Time/ Integrated Social Studies and Science</b>

**(3 hours and 35 minutes of instructional time)**

The school envisions a team environment where subject matter experts collaborate to develop lessons and activities that maximize learning and to facilitate the Somerset educational philosophy and educational strategies. As found in the Elementary schedule, common planning time will be a key element in supporting the development of a successful Somerset Curriculum Model.

The basic learning environment at Somerset West Valley will support the school's mission in that the educational program is designed to serve all students and accommodate diverse needs and learning styles. Teachers will begin the school year with a thorough review of their students' previous year data which includes previous course grades and AzMERIT scores (grades 3-5). The school will also administer a pre-test assessment for Reading and Mathematics using i-Ready diagnostic assessments at the beginning of each school year. This will allow the School to gather the most current data in order to determine areas of students' strengths and weakness, to make accurate placement decisions and to provide differentiated instruction and appropriate interventions/support services. The educational program will be structured in accordance with required minutes of instruction per class and grade level with fidelity to course content and course descriptions. Also, we believe that students learn best in a personalized small school setting.

*Elementary Program Design*

Subject	Grade	Program Design	Interventions for Struggling Students/ELL/SWD
<b>ELA Reading</b>	K-5	90 minutes consecutive, uninterrupted, daily instruction	Additional 30 minutes minimum for Tier 2. For Tier 3: Interventions may be modified in art, music and social science. * ELL and SWD have the same instructional time.
<b>Writing</b>	K-5	150 minutes weekly (minimum 30 minute instructional blocks)	
<b>Math</b>	K-5	60 minutes consecutive, uninterrupted, daily instruction	Interventions provided within the instructional time allotted for math. SWD have the same instructional time
<b>Science</b>	K-1	60 minutes per week	SWD have the same instructional time
	2-5	150 minutes per week including science labs minimum once a week	SWD have the same instructional time
<b>Social Science</b>	K-1	60 minutes per week	Individual intervention for Tier 3 students may be modified in Social Science
	2-5	150 minutes per week	SWD have the same instructional time

<b>Art</b>	K-5	60 minutes per week	Individual intervention for Tier 3 students may be modified in Art including students with disabilities. A minimum of 30 minutes of instruction per week in Art must be provided.
<b>Music</b>	K-5	60 minutes per week	Individual intervention for Tier 3 students may be modified in Music including students with disabilities. A minimum of 30 minutes of music instruction must be provided.
<b>Physical Education</b>	K-5	150 minutes per week	Time requirements may be modified for students requiring intervention in Tiers 2 and 3 with a minimum of 60 minutes of PE required per week.
<b>Recess</b>	K-5	30 minutes daily	
<b>World Languages</b>	K-5	150 minutes per week (Spanish)	HLA: (Spanish- S) constitutes an alternative Language Arts program and may represent the comparable time required for intervention for ELLs. ELL Committee decides appropriate interventions for ELLs. The IEP Team can consider the provision of CCHL for ELL students with disabilities.
<b>Home Language Arts for ELL</b>	K-5	(Spanish-S) - 150 minutes per week for all ELLs.	
<b>Intensive Acceleration Course</b>	3-4*	90 minutes of daily intervention incorporating Science and Social Science and opportunities to master Grade 4 AZ Standards in other core subject areas.	* intended for retained 3rd grader who scored in the lowest 20% on the AZ MERIT and for 4th graders who were promoted due to Good Cause #6.

***NOTE\*** - The School will address the specific needs of learners via an individualized approach for the placement of students in courses. The School will consider test scores, academic history, state and district requirements, and teacher recommendations when*

**A.5**

# **Academic Systems Plan**

**Academic Systems Plan Template**Applicant Name: Somerset Academy of the West Valley K-5 (SAWV)**Duration of the Plan:** Begins July 1 and continues for two years

	<b>Baseline</b> (current performance of target population)	<b>Predicted Target</b> (expected performance in Year 1)
<b>Math</b>	<b>40%</b>	<b>55%</b>
<b>Reading</b>	<b>34%</b>	<b>50%</b>

**Narrative for setting baseline figures**

The SAWV Governing Board has developed several over-arching goals to guide the new Arizona school. The goals address accreditation performance indicators, student performance standards, and organizational management goals. All goals were set with Somerset's vision focusing on "Empowering students to explore global learning opportunities to promote and enrich their communities and the communities we serve." As well as the purpose/mission of Somerset Academy, Inc. that "promotes a transformational culture that maximizes student achievement and the development of accountable, global learners in a safe and enriching environment that fosters high-quality education."

SAWV has compiled data from the Glendale area, where SAWV will be located. Glendale is currently experiencing an increase in population and is the 5<sup>th</sup> most populous city in Arizona. All public elementary schools within a 5-mile radius of the proposed school site was examined by averaging all findings together. **Table 1** lists the 51 schools within the 5-mile radius.

**Table 1 – Schools within 5-mile radius of proposed school site**

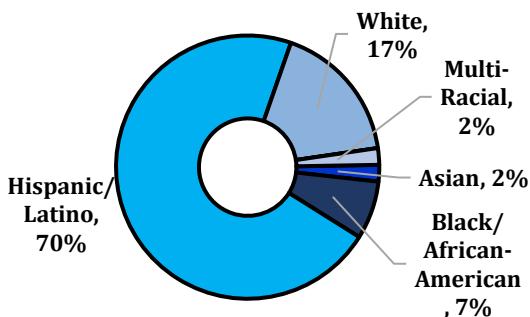
<b>School Name</b>	<b>School Type</b>
Acclaim Academy	Charter
Alta Loma Elementary School	District
Bicentennial North School	District
Bicentennial South School	District
Bret R Tarver Elementary School	District
Carol G Peck Elementary School	District
Cartwright Elementary School	District
Cheyenne Elementary School	District
Copper Canyon Academy	District
Cotton Boll Elementary School	District
Country Meadows Elementary School	District

## Academic Systems Plan Template

Coyote Ridge	District
Desert Garden Elementary School	District
Desert Horizon Elementary School	District
Desert Mirage Elementary School	District
Desert Oasis Elementary	District
Desert Spirit School	District
Discovery School	District
G Frank Davidson Elementary School	District
Garden Lakes Elementary School	District
Glenn F Burton School	District
Great Hearts Academies- Maryvale Prep	Charter
Harold W Smith School	District
Heatherbrae Elementary School	District
Heritage Elementary School	Charter
Holiday Park School	District
Ira A Murphy Elementary School	District
James W Rice Primary School	District
John F Long Elementary School	District
Liberty Traditional Charter School	Charter
Loma Linda Elementary School	District
Melvin E Sine Elementary School	District
Oakwood Elementary School	District
Oasis Elementary School	District
Paramount Academy	Charter
Pendergast Elementary School	District
Peralta Elementary School	District
Pioneer Preparatory School	Charter
Sahuaro Ranch Elementary School	District
Santa Fe Elementary School	District
Sheely Farms Elementary	District
Skyview Elementary School	Charter
Starlight Park Elementary School	District
Sundance Elementary School	District
Sunset School	District
Sunset Vista Elementary School	District
Tomahawk Elementary School	District
Villa de Paz School	District
Westland School	Charter
Westwind Elementary School	District
William C Jack Elementary School	District

Based on the ethnic demographics of those schools it is expected that the target population will be similar and will represent the percentages noted below in **Chart 1** and **Table 2** below. (This data is explained in more detail in section A.2 Target Population.)

**Chart 1: Target Population - Ethnic Demographics**



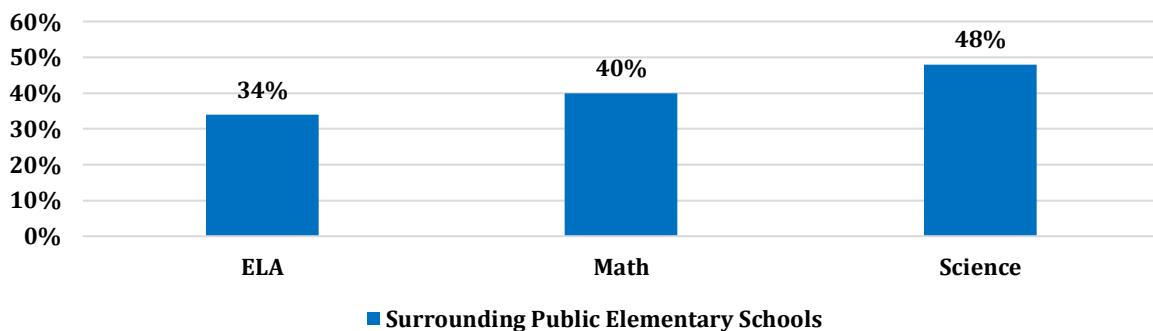
**Table 2: Target Population – Student Subgroups**

English Language Learners	16%
Free/Reduced Lunch	81%
Students with Disabilities	11%

The data displayed in **Chart 1** and **Table 2** was obtained from the Arizona Department of Education's website for Accountability & Research, Data. Findings were obtained from all public elementary schools within a 5-mile radius of the school's proposed location and then averaged together. Thus, with 70% of the projected student population being Hispanic/Latino and 81% qualifying for Free/Reduced Lunch (FRL) services, SAWV anticipates serving a student population that is of high need and historically educationally disadvantaged.

Furthermore, the educational need of our target population is also evidenced in the current academic results of the community. The proficiency results on the AzMERIT were obtained from Arizona's Department of Education website for these same schools within a 5-mile radius of the school's proposed location. As with the demographics above, these findings were compiled by tested subject area and then averaged together. As demonstrated in **Chart 2** below, our targeted population currently leaves room for academic improvement:

**Chart 2: Target Population Achievement Results**

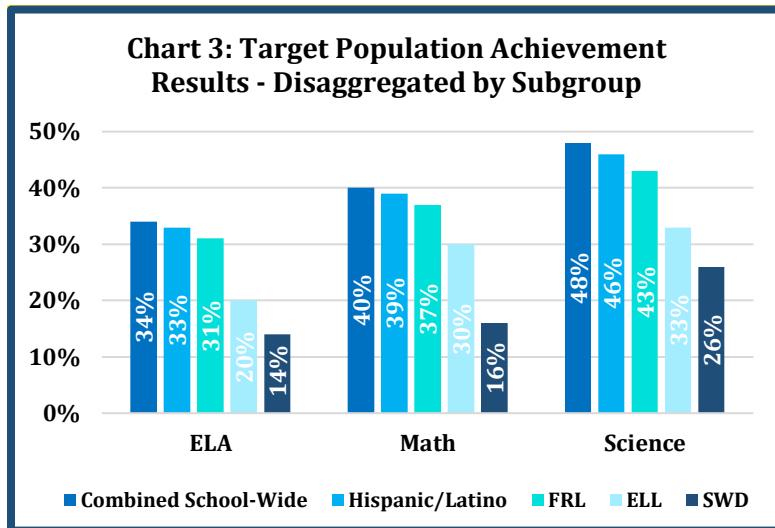


<sup>1</sup> Native Hawaiian/Pacific Islander and Alaskan Native/Native American were less than 1% and thus not included in this chart.

<sup>2</sup> Arizona Department of Education. Accountability & Research, Data. 2017-18 AzMERIT Results.

<https://www.azed.gov/accountability-research/data/>; last accessed June 2019.

Furthermore, the proficiency results are worse when the data is divided into specific student subgroups as demonstrated in **Chart 3<sup>3</sup>** below:



The SAWV Board has evaluated the academic performance data and the demographic data of schools within a 5-mile radius of the proposed school site and has set forth the following goals for the proposed school in alignment with the goals set forth for Somerset affiliate schools located throughout Florida:

1. Sixty percent (60%) of students enrolled at the school for three consecutive years will achieve adequate or advanced status on the state's annual assessment. This goal applies to students who upon the third consecutive year of enrollment, are registered in the third through fifth grade. Goal will be measured through the state's annual assessment, AzMERIT.
2. Achievement gaps, if they exist between students in targeted at-risk student subgroups (economically disadvantaged, English Language Learners, Students with Disabilities and other at-risk groups) and the general student population, the school will work to decrease the achievement gap between each subgroup and the general student population by 30% (without reducing the rigor and performance of the general student population). This goal will be measured through the state's annual assessment, AzMERIT.

The SAWV Board has evaluated the academic performance data and the demographic data of schools within a 5-mile radius of the proposed school site and has set forth the following predicted target goals for year one for the proposed school:

1. Predicted target for expected performance in Year 1 in mathematics: fifty-five percent (55%) of students will be proficient.

<sup>3</sup> Ibid.

2. Predicted target for expected performance in Year 1 in reading: fifty percent (50%) of students will be proficient.

The SAWV Board recognizes that the incoming students enrolled will be comprised of students with a wide range of academic proficiency and academic skill gaps, with an average proficiency of 34% in ELA and 40% in mathematics. The SAWV board believes that the proposed school will increase student achievement by at least 10% points in its first year of operation based Somerset's academic performance in similar student populations. The SAWV board expects to replicate its proven track record experienced in its Florida affiliate schools of decreasing achievement gaps by at least 30% in the first 3 years, as demonstrated throughout the Somerset system of schools.

#### **AREA I: Elements of a Comprehensive Curriculum System**

*Complete the plan for each of the five sections. Provide **sufficiently detailed** and **implementable action steps** that address each of the following elements of a comprehensive curriculum system:*

- i. adoption of curriculum aligned to Arizona State Standards;
- ii. implementation of curriculum;
- iii. evaluation of curriculum
- iv. revision of curriculum; and
- v. adaptation to address the curriculum needs of subgroup populations.

*For each Action Step you add, ensure all fields have been completed.*

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b>i. Adoption of curriculum aligned to Arizona State Standards</b>			
Research the Somerset Academy schools in Florida's lists of textbooks for names of all highly effective textbooks/instructional materials currently in use and available in Arizona State Standards.	SAWV Governing Board Affiliate Leadership Teams Principal	Year Zero: Spring 2020	Curriculum guidance documents and curriculum description (core curriculum, standards based grading policies, AZ Standards, and resources) provided to all staff and made accessible on the school website by all stakeholders and to the public.
Convene a committee to review and <b>evaluate</b> curriculum and supplemental curriculum that is not currently in use in the Somerset Florida schools that is strongly aligned to Arizona State Standards and reflects the mission and vision of SAWV including content	SAWV Governing Board Principal	Year Zero: Spring 2020 Principal	Curriculum guidance documents and curriculum description (core curriculum, standards based grading policies, AZ Standards, and resources) provided to all staff and made accessible on the school website by all

## Academic Systems Plan Template

<p>standard and process standards that includes the following:</p> <ul style="list-style-type: none"> <li>• a variety of assessment types</li> <li>• meaningful learning experiences and resources that are purposeful</li> <li>• demonstrate success with all student subgroups and demographics including English Language Learners (ELL) and students with disabilities</li> <li>• dynamic, emphasizes student-centered instruction towards mastery of the Arizona State Standards</li> <li>• Technology rich, effective supplementary programs and tools that include multi-sensory learning experiences</li> </ul>	<p><b>Adopting New Curriculum</b></p>	<p>SAVV Governing Board Principal</p>	<p>Year Zero: Spring 2020</p> <p>stakeholders and to the public.</p> <p>Governing Board minutes (which are accessible on the school website by all stakeholders and to the public) noting the curriculum that has been adopted for SAVV</p>
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<p><b>Conduct ongoing data analysis</b> on an annual basis to identify gaps in content with selected materials and measure effectiveness of adopted curriculum. Make changes as needed to meet the needs of target population.</p>	<p>SAWV Governing Board Principal</p>	<p>Year One: End-of-Year data analysis Year Two and Beyond: continuous cycle of data analysis to ensure adopted texts and curriculum materials address the needs of all subgroups</p>	<p>Curriculum guidance documents and curriculum description (core curriculum, standards based grading policies, AZ Standards, and resources) provided to all staff and made accessible on the school website by all stakeholders and to the public.  Annual state assessment reporting</p>
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#### Process for Implementing Action Step

**Research Somerset Curriculum:** The SAWV Governing Board, Somerset Academy, Inc. Board, Principal, and leadership teams from Somerset affiliate Florida schools will meet in the Spring of 2020 to analyze the proposed curriculum and supplemental curriculum to ensure all materials are aligned to Arizona Standards and also reflect the Somerset mission and vision for student development and achievement. **Stakeholders will follow the recommended steps to using evidence in education as outlined in *Using Evidence to Strengthen Education Investments* published in 2016 by the U.S. Department of Education in alignment with Every Student Succeeds Act (ESSA).** Utilizing research based evidence, Stakeholders will follow the following steps in the decision-making model: identify local needs (Arizona target population/standards); select relevant, evidence-based interventions and curriculum; plan for implementation; implement; and examine and reflect.<sup>4</sup> The Somerset curriculum will be aligned to Arizona State Standards as identified in section A.3 Program of Instruction

SAWV plans to replicate the highly successful curriculum model of Somerset Academy, Inc. The Somerset Inc. affiliation is a key partnership in the success of the curriculum development plan. Somerset Inc. has successfully opened and implemented this curriculum model and best practices at their schools in Florida. The Somerset curriculum model includes four key components:

1. Standards Aligned Curriculum (to the state in which the school is located. Florida has aligned their ELA and Math curriculum to the Common Core State Standards and Science to Next Generation Science Standards, thus making the program easily replicable to AZ State Standards);
2. Research-based, rigorous, college-preparatory education program with an emphasis on student-centered instruction towards master of Common Core State Standards best practices and methods utilized to implement curriculum.
3. Basal Textbooks and Other Support Materials that are standards aligned and support learning;
4. The philosophy that Somerset schools should meet the needs of the community in which they are located and the students they serve through data driven instruction.

The Somerset Inc. Affiliation Agreement provides support in best practices in curriculum adoption, standards aligned curriculum, developing course scope and sequences, Data-Driven Instructional Model, support in starting a new school, selecting supplemental materials, and staff training. With this support, each Somerset school is provided the freedom

<sup>4</sup> U.S. Department of Education. (2016) Non-Regulatory Guidance: *Using Evidence to Strengthen Education Investments*. Last Accessed April 2018 from:

<https://www2.ed.gov/policy/elsec/leg/essa/guidanceuseseinvestment.pdf>

to plan their own course scope and sequences and select instructional strategies that will be implemented in year one that will be built upon in the following years. This model allows SAWV to best meet the needs of its unique community and students while having the support to ensure success.

**Convene a committee to review and evaluate curriculum and supplemental curriculum that is not currently in use in the Somerset Florida schools:** SAWV stakeholders will adopt curriculum that is aligned to Arizona State Standards through the following process outlined below:

SAWV stakeholders will further analyze baseline data (based on available data on Arizona Report Card in year one) to determine the needs and root causes of achievement gaps of its targeted student population. The proposed curriculum and supplemental materials will be aligned to AZ Standards and evaluated for effectiveness for progression towards achieving the student outcomes and performance goal: eighty (60) percent of students will demonstrate one year's growth in Reading and Mathematics as measured by the school's chosen standardized assessment(s)/universal screener(s). Once the data analysis result in overall incoming student needs and achievement gaps, if they exist, SAWV stakeholders will determine which research-based, ESSA-evidence, curriculum and supplemental materials will best serve the needs of the target population. Once curriculum and supplemental materials have been selected, SAWV will analyze the curriculum's alignment to AZ State Standards to identify: gaps in content where standards need supplemental materials, revisions needed to ensure spiraled and vertically aligned content to AZ State Standards, validation that the proposed curriculum as presented in section **A.3 Program of Instruction** aligns with AZ State Standards and the school's mission and vision, and additional questions generated by standard alignment data. SAWV, with the support of Somerset, Inc. affiliate, will select relevant, evidence-based curriculum materials aligned to Arizona Standards that best meets the needs of its proposed target population.

**Evaluating proposed curriculum:** Like noted in the recommended steps to using evidence in education as outlined in *Using Evidence to Strengthen Education Investments* published in 2016 by the U.S. Department of Education in alignment with Every Student Succeeds Act (ESSA), all proposed curriculum have at least one study that demonstrates evidence that it will serve the needs of the targeted population. A wide range of evidence must show relevant outcomes on student achievement.

**Adopting new curriculum:** Once curriculum and supplemental materials have been selected by the SAWV stakeholders and review committee, both school leaders and teachers will have the opportunity to collaborate with other teachers and other schools within the Somerset Network that is using the same curriculum. Other Somerset schools and Somerset teachers within the network will assist in familiarizing SAWV staff to the possible new curriculum as well as supplemental materials that work well with that curriculum. If the curriculum is not already used by one of the Somerset Network schools than extensive professional development will be given to both SAWV staff as well as Somerset Network support teams and experts so they can also assist SAWV staff as they continue to roll out the new curriculum. Curriculum and supplemental curriculum for Reading, Writing, Math, and Science will only be fully adopted when strong evidence has been supported by studies, evidence gathered from other Somerset successes with similar student populations, and stakeholders have confidence that the selected curriculum will best serve the needs of the targeted population at SAWV. Once the governing board has thoroughly reviewed all data, evidence, and considered feedback and suggestions from the Somerset Network experts as well as SAWV leadership staff, the governing board will officially adopt the new curriculum.

**Conduct ongoing data analysis:** Once curriculum and supplemental materials have been selected, SAWV will conduct annual curriculum data analysis to analyze the curriculum's effectiveness in its alignment with Arizona State Standards and increased academic achievement in target population and will conduct curriculum committee review protocol to select replacement relevant, evidence-based curriculum materials aligned to Arizona Standards that best meets the needs of its proposed target population.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<i>ii. implementation of curriculum</i>			

## Academic Systems Plan Template

<p>Hire a dynamic and innovative educational leader that embodies the mission and vision of SAWV</p> <p>Recruit both within and outside their system to provide quality teachers prepared to take leadership roles for the new school</p> <p>Mitigate many of the potential risks of startup by SAWV leader taking advantage of the fact that Somerset Academy, Inc. has existing campuses and can replicate these as models of implementing adopted curriculum aligned to AZ State Standards</p>	<p>SAVV Governing Board (volunteer governing board)</p> <p>Principal</p> <p>Interview Team (principal and members of governing board)</p> <p>Educational Support Provider (Human Resources Support Department)</p> <p>Somerset Inc. Affiliate (non-profit organization providing Professional Development and Education Support services)</p> <p>Principal</p> <p>Instructional Staff</p>	<p>Winter of 2020: upon authorization from the Arizona State Board for Charter Schools, SAWV Board selects building leader</p> <p>Winter of 2020: Building Leader and Interview Team (Somerset, Inc. Affiliation support) review qualified applicant resumes and attend teacher recruiting and hiring fairs to select and hire highly qualified teachers for K -5 and Specialists</p> <p>Spring and Summer of 2020: teacher candidates notified of intent to hire</p> <p>Year One: Fall 2020 professional development and Somerset Inc. Affiliate support in implementing curriculum throughout the school year</p> <p>Year Two: Continued professional development and Somerset, Inc. Affiliate support in implementing curriculum</p> <p>Year Three: Continued professional development and Somerset, Inc. Affiliate support in implementing curriculum</p>	<p>Resumes and applications from Leadership selection process and teacher hiring as provided by SAWV contracted Educational Service Provider</p> <p>Resumes and applications from teacher selection process and teacher hiring as provided by SAWV contracted Educational Service Provider</p> <p>Professional development agendas and presentation materials</p> <p>Somerset, Inc. affiliate school visit materials and curriculum implementation documents</p>
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## Academic Systems Plan Template

<p>Develop a scope and sequence or pacing guide for all subjects aligned to Arizona State Standards</p> <p>Integrating Curriculum into instruction with fidelity</p>	<p><b>Principal</b></p> <p>Instructional Staff</p> <p>Somerset, Inc. Affiliate (non-profit organization providing Professional Development and Education Support services)</p> <p>Instructional Staff with guidance and oversight of Principal</p>	<p>Year One: Fall 2020 professional development and Somerset Inc. Affiliate support in developing scope and sequence or pacing guides. Teachers develop pacing guides and scope and sequence documents. Teachers create instructional calendars and design lessons using documents.</p> <p>Year Two: Continued professional development and Somerset Inc. Affiliate support in developing scope and sequence or pacing guides and creating lesson plans following pacing calendars and guides. Teachers create instructional calendars and design lessons using documents.</p> <p>Year Three: Continued professional development and Somerset Inc. Affiliate support in developing scope and sequence or pacing guides and creating lesson plans following pacing calendars and guides. Teachers create instructional calendars and design lessons using documents.</p> <p>Year One: After professional development and teacher collaboration, teachers create lesson plans that integrate the key elements of the curriculum as well as aligning with AZ state standards.</p> <p>Year Two: Additional professional development and instructional support will be provided to ensure integrating of curriculum into instruction</p> <p>Year Three: Additional professional development and instructional support will be provided to ensure</p>	<p>Scope and sequence documents</p> <p>Pacing guides</p> <p>Instructional Focus Calendar</p> <p>Teacher Lesson Plans</p> <p>Scope and sequence documents</p> <p>Pacing guides</p> <p>Instructional Focus Calendar</p> <p>Teacher Lesson Plans</p> <p>Principal Evaluations of Teachers</p>
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## Academic Systems Plan Template

		integrating of curriculum into instruction	
Monitor and make adjustments to the implementation of the selected curriculum using performance metrics and classroom observation data.	SAWV Board (volunteer governing board)  Principal	Continuous ongoing cycle for monitoring and adjusting curriculum implementation based on performance metrics and classroom observation data. Universal screener data collected 3 times/year, progress monitoring data monthly/bi-weekly, AzMerit data yearly. Informal observations conducted weekly, formal observations three times per year.	Curriculum implementation observation data and fidelity classroom walkthrough data  Teacher lesson plans  AzMerit student performance data disaggregated by performance level descriptors  School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis

### Process for Implementing Action Step

**Hire educational leader:** The SAWV board will recruit both within and outside of the Somerset system to select a highly dynamic and innovative educational leader that embodies the mission and vision of SAWV. SAWV board will collect resumes, applications, and letters of recommendation to select applicants who will be invited to interview for the position. The board will conduct interviews of potential school leaders and select the school leader that is the most qualified applicant.

**Recruit and hire instructional staff:** The SAWV principal with the assistance of its Educational Support Provider will recruit both within Arizona and nationally to select and hire instructional staff who are aligned to the mission and vision of Somerset Academy of Arizona. Positions will be advertised on a variety of media platforms with the assistance of the Human Resources Department provided by SAWV's Educational Support Organization. SAWV Board

will guide the new principal in the hiring of instructional staff to ensure that the campus stays true to Somerset's vision and mission in the hiring of staff.

**Mitigate potential risks of startup:** SAWV Board plans on hiring school leaders prior to the end of the 2019 -2020 school year and plans to provide several opportunities for school leader of the new campus to observe the logistical, financial, and academic best practices of Somerset, Inc. Affiliate existing campuses. This, in addition to the professional development Somerset will provide to its leadership and faculty during the on boarding process will mitigate many of the potential risks of startup.

**Develop scope and sequence or pacing guides:** The faculty of the school will develop a scope and sequence or pacing guide for each course. SAWV teachers and principal will receive support in Professional Development for setting this process up through the Somerset Inc. affiliation. This tool serves as the basis for lesson plan development to ensure that all benchmarks are addressed in a timely manner. The scope and sequence or pacing guide will largely be aligned to the basal text. Teachers will develop and/or provide additional resources such as novels of varying genres, as may be necessary, to teach benchmarks not adequately addressed in the basal text. The faculty of the school will also develop a reading and mathematics instructional focus calendar to provide a framework which enables all faculty and support staff to simultaneously address the same standards.

As teachers plan at grade levels and individually, they will make sure to identify:

1. The overall goal of the Lesson/Unit;
2. What students will understand as a result; and
3. Measurable objectives that align with the: 1). Content Strand (s) and 2) Art Strand.

**Integrating Curriculum into instruction:** Curriculum and instruction are both shaped by expectations about the kinds of educational outcomes that are set forth. AZ state standards are always keep in mind while implementing the curriculum as they dictate the knowledge and skills that students are expected to gain. The curriculum is 'the plan' that is used to achieve those goals. The curriculum is not meant to be a script as teachers, school leaders, and data that is continually collected on each student will drive the instruction to keep students engaged as well as to meet each student at his or her level. The curriculum is the road map however the students (with the teacher as the guide) are the drivers.

**Implementation of curriculum (monitoring):** SAWV Board and instructional leadership, with the support of its affiliate will collaboratively monitor implementation of the selected curriculum that is aligned to AZ Standards. Somerset Academy, Inc.'s educational program is modeled after dynamic student-centered innovative instructional methods and strategies that have proven successful in raising student learning and achievement, especially for those students most vulnerable for academic failure, include but are not limited to:

- A course guide, lesson plans, and syllabi based on the Arizona Academic Standards
- A hybrid, standards-based approach to grading and communication of grades.
- A thematic approach to integrate core areas of study such as: mathematics, reading, language arts, writing, science, and social studies.
- A differentiated approach through blended learning to enhance student learning and goal tracking.
- Appropriate assessments to measure learning (screening, progress monitoring, and diagnostic).
- Data-driven, high-quality differentiated instruction for all students.
- Supplemental programming for student advancement and remediation.
- Research-based instructional practices (i.e., Randy Sprick's Safe and Civil School & CHAMPS, Kagan Cooperative Learning Structures, Blended Learning, and the Components of an Effective Lesson).
- Professional development and support for teachers with research-based practices, advanced curriculum, and technology integration.
- Weekly grade level meetings to review common pacing calendars and lesson plans.
- Data Days and Staff Development Days for ongoing review of campus and system-wide data and professional development workshops.
- Before and after school tutoring for remediation and acceleration.
- Targeted interventions for struggling students performing below grade level.

**Implementing Curriculum with fidelity:** SAWV and the board believe that curriculum fidelity is critical to ensure that the interactions and activities that make up a curriculum result in positive outcomes like increasing student achievement scores. This includes school-wide fidelity which is monitored by the principal to ensure that teachers are

## Academic Systems Plan Template

consistently and regularly implementing the key elements of the curriculum. This is addressed at faculty meetings and grade level meetings. In addition, individual lessons must show the in-the-moment information about the way a curriculum activity is going to be implemented each day. Lesson plans are written by teachers and monitored by the grade level chair and/or the principal. Furthermore, initial training on the curriculum is essential as well as practice-based support with modeling in addition to ongoing mentoring and opportunities for self and peer reflection.

**Ongoing assessment of curriculum & instruction:** The Board and instructional leader will continue to monitor and make adjustments to the implementation of the selected curriculum using performance metrics and classroom observation data. The data will be analyzed to ensure that the curriculum and the instruction is supporting the children's growth and development as well as the alignment with the AZ state standards.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b><i>iii. evaluation of curriculum</i></b>			
Collect multiple sources of data in order to strategically monitor student performance and to ensure it replicates the academic success demonstrated by Somerset Academy, Inc. affiliate's existing campuses in its ongoing cycle of evaluating the effectiveness of selected curriculum	SAWV Board (volunteer governing board)  Principal  Instructional Staff  Somerset Academy, Inc. (non-profit organization providing Professional Development and Education Support services)	Year One: Fall 2020 data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards throughout the school year  Ongoing process each year to make sure the needs of the specific students are being met	AzMerit student performance data disaggregated by performance level descriptors  School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis  Teacher observation/feedback  Formative Assessments  Summative Assessments
Verifying curriculum is aligned with student needs	Principal Instructional Staff		

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<p>Administer periodic and regular formative and summative assessments to students to gather and collect student achievement and learning progress. A myriad of data points and outcomes are maintained virtually. This ensures that all stakeholders may visualize the urgency to keep focused on student achievement and keep involved with the implementation of curriculum and the allocation of resources to promote student learning.</p>	<p><b>Principal</b>   <b>Instructional Staff</b>   <b>Somerset Academy, Inc. (non-profit organization providing Professional Development and Education Support services)</b></p>	<p><b>Year Two:</b> Continued data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards throughout the school year</p> <p><b>Year Three:</b> Continued data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards throughout the school year</p>	<p>AzMerit student performance data disaggregated by performance level descriptors</p> <p>School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis</p>
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### Process for Implementing Action Step

**Collect data and strategically monitor student performance:** Somerset Academy, Inc. has gone to great lengths to develop performance metrics that adequately and reliably detail the effectiveness of implementation of curriculum and supplemental materials. The Board will employ user-friendly performance dashboards at meetings and will receive monthly academic performance updates and curriculum implementation status updates. Furthermore, Somerset, Inc. has implemented a curriculum that is designed to ensure academic growth for all students including those in general education, special education, and the academically disadvantaged (at-risk) students. With these measures in place, SAWV is confident that its proposed target community of students will maintain year-over-year academic growth with implementation of the selected curriculum; thus, monitoring for inadequate student performance in its new campus as an indicator to evaluate the effectiveness of the selected curriculum aligned to AZ Standards.

**Verifying curriculum is aligned to student needs:** This is an ongoing process that involves both SAWV leadership and teachers. It is important time is devoted to deliberations to truly discuss and analysis what is working for the students that are physically at SAWV in regards to curriculum and instruction. This can be determined by the results of formative and summative assessments (explained below) but also through teacher observation and student feedback. If the curriculum seems to be lacking in areas, and not meeting the needs of the students, the SAWV staff, with the support of the Somerset Network support team, will make adjusts and locate additional support or resources if necessary.

**Administer formative and summative assessments:** Somerset Academy, Inc. utilizes curriculum that begins with the end in mind using the final assessment to determine development and learning objectives through multiple tiered instructional levels that allow students to show mastery of the content. In addition to using the school's designated research-based programs, each staff member is encouraged to look beyond traditional methods of teaching when helping students develop a deep understanding of the content. Staff will meet regularly in a collaborative team to discuss students' progress and next steps as it relates to implementing and evaluating the selected curriculum that is aligned to AZ Standards. During this time staff are also learning alongside one another through a variety of professional learning opportunities and collaborative sharing best practices in instructional pedagogy using multiple data points to reach the students in a "learning environment that is physically, emotionally, and intellectually safe."<sup>5</sup>

The Somerset Academy, Inc. learning model and curriculum will be implemented and evaluated for effectiveness in meeting all demographic profiles, from low socioeconomic students to high socioeconomic students. The target student population will be from various academic and socioeconomic backgrounds. This includes special education programs, English learners, and acceleration for those who have shown performance based mastery of the content. In

<sup>5</sup> ibid

## Academic Systems Plan Template

an ongoing cycle of evaluating the curriculum, a variety of data points will be collected to monitor the progress of Somerset Arizona's implementation of selected curriculum.

**Identifying a curricular gap:** Through the assessments, teachers' feedback, and overall monitoring, SAWV leadership will look for curricular gaps in reading, writing, math, science, and social studies. As formative assessments and benchmark assessments aligned to the AZ state standards are given, the data will uncover if curricular gaps exist or even if a particular area was not thoroughly addressed. If curricular gaps do exist then the leadership team will address them at the moment, being sure to find other resources and activities to make sure that each area is taught and reassessed. For the following year, the curriculum can be revamped by SAWV staff and Somerset leadership to make sure that the curriculum gap is corrected for the following year. All areas including student engagement, lesson design, lesson preparation, lesson delivery/instructional methods, and classroom culture is accounted for in the adjustment.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b><i>iv. revision of curriculum</i></b>			
Collect multiple sources of data in order to strategically revise the curriculum as needed	Principal  Teachers  Somerset Academy, Inc. Affiliate support (non-profit organization providing Professional Development and Education Support services)	Year One: data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards and making revisions to the curriculum as needed  Year Two: Continued data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards and making revisions to the curriculum as needed  Year Three: Continued data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards and making revisions to the curriculum as needed	AzMerit student performance data disaggregated by performance level descriptors  School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis  Curriculum implementation observation data and student performance data as it aligns to the Framework
Align all curriculum to all content areas and	Principal	Year One: data collection and analysis with the	Curriculum implementation

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<p>identifying areas of the adopted Somerset Academy, Inc. curriculum that may need revision</p>	<p><b>Teachers</b> Somerset Academy, Inc. Affiliate support (non-profit organization providing Professional Development and Education Support services)</p>	<p>support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards and making revisions to the curriculum as needed</p> <p>Year Two: Continued data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards and making revisions to the curriculum as needed</p> <p>Year Three: Continued data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards and making revisions to the curriculum as needed</p>	<p>observation data and student performance data as it aligns to the Framework</p>
<p>Create a Framework that provides a consistent, clear understanding of what pupils are expected to learn at each grade level. Utilizing the Framework and multiple data sources, revisions to the curriculum will be made evident and will be changed to support student achievement and revise curriculum to fill in gaps</p>	<p><b>Principal</b> <b>Teachers</b> Somerset Academy, Inc. Affiliate support (non-profit organization providing Professional Development and Education Support services)</p>	<p>Year One: Create Framework and utilize with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards and making revisions to the curriculum as needed</p> <p>Year Two: Continued data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards and making revisions to the curriculum as needed</p> <p>Year Three: Continued data collection and analysis</p>	<p>Curriculum Framework tool Revised curriculum (as needed)</p>

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<p>Revisions to curriculum and/or replacing curriculum</p>	<p>Principal Teachers  Somerset Academy, Inc. Affiliate support (non-profit organization providing Professional Development and Education Support services)  SAVV Board (if new curriculum is necessary)</p>	<p>with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards and making revisions to the curriculum as needed</p> <p>Ongoing process each year to make sure the needs of the specific students are being met</p>	<p>Curriculum Framework tool  Revised curriculum (as needed)</p>
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### Process for Implementing Action Step

**Collect multiple sources of data:** SAWV leadership, Somerset Academy, Inc. Affiliate, and instructional staff will collect multiple sources of data in order to strategically revise the curriculum as needed in alignment to the Framework aligned with AZ Standards.

**Align all curriculum:** SAWV leadership, Somerset Academy, Inc. Affiliate, and instructional staff will collect multiple sources of data in order to strategically revise the curriculum as needed in alignment to the Framework aligned with AZ Standards.

**Create a Framework and revise curriculum (as needed):** SAWV leadership, Somerset Academy, Inc. Affiliate, and instructional staff will create a framework to use in evaluating curriculum, identifying gaps, and revising curriculum based on the following:

Reading, Writing, and Communicating: Through carefully designed differentiated literacy instruction, SAWV's English Language Arts instruction will follow the Reading, Writing, and Communicating Arizona Academic Standards in practices consisting of the following:

- Building a strong reading foundation
- Accessing complex text
- Finding and using text evidence
- Engaging in collaborative conversations
- Writing for different genres

Using a rich range of diverse print and digital media, SAWV's reading curriculum will provide the instructional support and materials necessary to teach the rigor, intent, and depth needed to fulfill and extend students' literacy learning. SAWV will utilize various data points to determine areas of the curriculum that may need to be revised to ensure alignment to AZ Standards and results in increased academic achievement.

Mathematics: SAWV will follow Arizona Mathematics Academic Standards. The following practices are embedded throughout our mathematics curriculum:

- Make sense of problems and persevere in solving them.
- Reason abstractly and quantitatively.

- Construct viable arguments and critique the reasoning of others.
- Model with mathematics.
- Use appropriate tools strategically.
- Attend to precision.
- Look for and make use of structure.
- Look for and express regularity in repeated reasoning.

These mathematical practices are utilized along with SAWV's core mathematics program, to deepen our students' knowledge in arithmetic, basic facts, but most importantly, mathematical thinking, conceptual understanding, and reasoning. SAWV will utilize various data points to determine areas of the curriculum that may need to be revised to ensure alignment to AZ Standards and results in increased academic achievement.

**Science:** Science instruction revolves around hands-on experiences through the guidance of the current AZ Science Standards through the adoption of the new Science standards that were adopted. Science instruction will use research based curriculum as well as teacher created units. The Science Program will bridge research and practice by providing tools and strategies to engage our students in enduring experiences that lead to deeper understanding of the natural and designed worlds. SAWV will utilize various data points to determine areas of the curriculum that may need to be revised to ensure alignment to AZ Standards and results in increased academic achievement.

**Social Studies:** Social Studies instruction provides foundational skills that are key to building communication, collaboration, and critical thinking. Following the Colorado Academic Standards, teachers will create units and utilize the Twenty-First Century Skills to teach students how to make informed and reasoned decisions for the public good as citizens of a culturally diverse, democratic society in an interdependent world. In grades K-5, Social Studies Standards will be taught through Thematic Units. SAWV will utilize various data points to determine areas of the curriculum that may need to be revised to ensure alignment to AZ Standards and results in increased academic achievement.

**Rewriting existing curriculum:** As noted above, the curriculum can and will be revised as necessary to meet the needs of the students in all areas. Throughout the first year, and then each year afterwards, the curriculum that was adopted will be reviewed to consider what worked and what did not work – determined by teacher observations and feedback, student assessments, and AZ state standard aligned benchmark assessments. This is led by the school principal and all teachers are expected to contribute to make sure that each year the curriculum will meet the needs of the students and teachers can improve in their practice. The review and revision process is consistent throughout the year, with frequent check-in meetings with principal and staff and periodic reviews of any revisions that were made. The curriculum revision process is truly a team approach and is based on the framework that is noted above.

**Replacing and/or supplementing existing curriculum:** Similar to making revisions of the curriculum, replacing and supplementing existing curriculum is determined at the school level by a collaboration of the principal, leadership team, and teachers. If it is determined, at the school level, that more than revisions are needed such as supplementing with additional curriculum or completely replacing a curriculum then the steps noted in A.5c-I(i) explaining the process of evaluating proposed curriculum programs and adoption of new curriculum will be followed, which involves following the recommended steps to using evidence in education as outlined in *Using Evidence to Strengthen Education Investments* published in 2016 by the U.S. Department of Education in alignment with Every Student Succeeds Act (ESSA) to evaluate the proposed curriculum. Curriculum and supplemental curriculum for Reading, Writing, Math, and Science will only be fully adopted when strong evidence has been supported by studies, evidence gathered from other Somerset successes with similar student populations, and stakeholders have confidence that the selected curriculum will best serve the needs of the targeted population at SAWV. Once the governing board has thoroughly reviewed all data, evidence, and considered feedback and suggestions from the Somerset Network experts as well as SAWV leadership staff, the governing board will officially adopt the new curriculum.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
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<b>v. adaptation to address the curriculum needs of subgroup populations</b>			
Administer language survey and free/reduced lunch qualifying surveys to parents upon enrollment of students to identify areas in curriculum to adapt	Front office staff/Registrar  Contracted Support Services  Principal  Instructional Staff  Somerset Inc., affiliate (non-profit organization providing Professional Development and Education Support services)	Annually: Registrar will administer and collect home language surveys and free/reduced lunch qualifying surveys. ELL curriculum adaptations implemented by instructional staff and monitored by principal. ELL support provided by Contracted Support Services (as needed). ELL professional development and support provided by Somerset, Inc. affiliate as needed.	ELL curriculum adaptations in lesson plans and SAWV ELL plans incorporating ESOL strategies and accommodations  Teacher lesson plans
Align programs of special education and curriculum adaptations as indicated in the registration of students after acceptance through enrollment lottery	Front office staff/Registrar  Special Education Support Services staff and contracted support services  Principal Instructional Staff  Somerset Inc., affiliate (non-profit organization providing Professional Development and Education Support services)	Annually: Registrar will administer and collect IEP data. IEP curriculum adaptations implemented by instructional staff and/or contracted support services and monitored by the principal. Special education programs and curriculum support and professional development provided by Somerset, Inc. affiliate as needed.	Teacher lesson plans  Student IEP documentation  IEP curriculum adaptations in lesson plans and SAWV IEP plans incorporating strategies and accommodations
Collect data from Universal Screening and Progress Monitoring of students that is analyzed during "Data Days" to discuss curriculum adaptations for children scoring in the bottom 25% and an intervention plan is developed with specific adaptations of the curriculum to meet needs of subgroup populations	Special Education Support Services staff and contracted support services  Principal  Instructional Staff	Annually: Regular education teachers administer universal screeners and progress monitoring assessments and analyze data each quarter during designated "Data Day." Accommodations and interventions plans created and adaptations to curriculum created as needed to meet needs of individual students.	School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis  Data Day reports  Teacher lesson plans with accommodations  Intervention curriculum materials

## Academic Systems Plan Template

			SABIT goals and intervention plans
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### **Process for Implementing Action Step**

**Administer language survey and free/reduced lunch qualifying surveys:** Educationally disadvantaged students will be identified early on, where all students who respond that a language other than English is spoken at home on a home language survey that is given out after a student is accepted to SAWV will trigger SAWV's ELL identification process. Students will be tested on their English proficiency, placement is then made and effective ESOL strategies will be incorporated to their accommodations. Data on other issues such as student homeless or poverty will also be gathered after acceptance and will be addressed in a matter consistent with federal and state law. The curriculum will be adapted to address the curriculum needs of ELL students.

**Align programs of special education:** After a student has been accepted through the lottery process, parents will be asked during registration if the student has an IEP. If the parent marks "Yes" a Pop-up window will request that the parent/guardian provide the student's current IEP, MDT report, 504 Plan, and eligibility statement. This information is collected and a caseload spreadsheet will be created to identify additional support and services that may be needed. In addition, the school registrar will request special education records from the student's previous school. All students will be assessed using SAWV's universal progress monitoring. Analysis of the progress monitoring will allow the school to begin to identify students who may need additional support, curriculum adaptions, and supplemental resources in forms of interventions – small groups and individual tutoring. Students will then be scheduled into classes based on need (e.g. Intervention classes).

SAVV will provide the necessary individual, classroom and/or school-wide intervention programs. Positive Behavioral Support (PBS) professional development will be used as an ongoing measure to ensure that the behavioral philosophy of the school is effectively implemented. PBS is a collaborative, assessment-based approach to developing effective interventions for problem behavior. The "use of PBS decreases the need for more intrusive or aversive interventions (i.e., punishment or suspension) and can lead to both systemic as well as individualized change," (Cohn)<sup>6</sup>. PBS can target the entire school as well as individual student behaviors, as "it does not focus exclusively on the student, but also includes changing environmental variables such as physical setting, task demands, curriculum, instructional pace, and individualized reinforcement," (Cohn). This is especially important for students who are educationally disadvantaged and at-risk. PBS emphasizes the proactive, educative, and reinforcement-based strategies that will achieve meaningful and long-lasting positive behaviors. When PBS strategies are implemented school-wide, it builds environments that are conducive to student learning and collaborative work.

SAVV's special education programs comply with all federal and state laws. SAWV will contract with a professional special education facilitator to complete compliance reviews on all IEPs. Special education facilitators help to monitor the academic and behavioral growth of students with disabilities in order to ensure that student needs are being met. Adjustments to instructional programs and adaptations to the curriculum are adjusted accordingly through the collaboration and progress monitoring. In addition, a review of confidential folders will be completed monthly. The special education facilitator will complete the annual and three year reviews.

**Collect data and analyze to make adaptions as needed:** The continuum of services offered by SAWV begins in regular education classes. All students are given a universal progress monitoring assessment 3 times a year. Then the school analyzes the data. Each quarter the school meets as a team during "Data Day" which allows the school to discuss children scoring in the bottom 25% or another cut score as determined by the school. Students who score in the bottom 25% and students who are failing are discussed and an intervention plan is developed. The staff then brainstorms different interventions, support, supplemental resources and adaptations to the curriculum that may help the student gain academically or behaviorally. In general education, Power Hour and intervention periods are scheduled in daily to provide instructional level academics to all students. In addition, before and after school tutoring clubs and blended online learning programs provide instructional level interventions.

<sup>6</sup> Cohn, A. (2001). *Positive Behavioral Supports Information for Educators*. Retrieved from:  
[http://www.naspcenter.org/factsheets/pbs\\_fs.html](http://www.naspcenter.org/factsheets/pbs_fs.html),

## Academic Systems Plan Template

If the student is still not showing progress on the universal progress monitoring, the student will enter into an SABIT program. During SABIT, a goal is written in the deficit academic area, the student is provided with additional interventions, support and curriculum adaptations, and the student has weekly progress monitoring related to the goal. The data is graphed and analyzed every 6-8 points. If the student's graphed line is not moving toward the grade level trend line, then instruction becomes more intensive by increasing the amount of time in intervention, increasing the number of sessions in intervention, differentiated instruction or changing the teaching method. If after 12-16 data points, the student's graph still shows a lack of progress, the student will be referred to special education.

Once the student is in special education, the student will receive support in regular education with supplementary aides and services. Progress monitoring continues. If a student shows no academic growth, the resource room is added and can be added up to 50% of the day to provide the necessary interventions to show academic growth.

Students with severe intellectual disabilities also can benefit from combining inclusion with resource room. In the regular education classroom, using peer assisted learning and online programs, SAWV can help the student remain with typical peers and receive intensive instructional level instruction with curriculum adaptations. SAWV will use data-based documentation that refers to an objective and systematic process of documenting a child's progress and monitoring success with the curriculum adaptations.

**Ensuring the curriculum meets the identified needs of students in all subgroups:** SAWV has researched both the ethnic demographics of the target population in addition to student subgroups (ELL, Free/Reduced Lunch, SWD). With over 20 years of experience, Somerset realizes that student needs can differ between subgroups. For that reason, both principals and teachers are trained in diverse teaching strategies, following more than 100 research-backed and teacher-tested strategies that assist teachers on how to reach students from economically, ethnically, culturally, and linguistically diverse groups. The resource book *Educating Everybody's Children: Diverse Teaching Strategies For Diverse Learners* by Robert W. Cole is incorporated into all curriculum subject areas. Subject-specific strategies for math, science, reading, writing, and social studies are incorporated from this resource.

### **AREA II: Elements of a Comprehensive Assessment System**

*Complete the plan for each of the four sections. Provide sufficiently detailed and implementable action steps that address each of the following elements of a comprehensive assessment system to assess student performance:*

- i. *developing the assessment system;*
- ii. *analyzing assessment data;*
- iii. *adapted to meet the needs of subgroups; and*
- iv. *year to year comparison.*

*For each Action Step you add, ensure all fields have been completed.*

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b>i. Developing the assessment system</b>			
Select formative and summative assessments to measure specific student learning outcomes	SAWV Board (volunteer governing board)  Somerset Academy, Inc. (non-profit organization providing Professional Development and Education Support services)	Year Zero: Formative and summative assessments will follow the Somerset, Inc. and affiliate schools in Florida best practices and follow Arizona state assessments and are as follows: iReady Reading and Math, DIBELS, Measure of Academic Progress (MAP), Galileo, The Arizona	Minutes from SAWV Governing Board Meeting indicating the approval of all summative and formative assessments.

## Academic Systems Plan Template

		<p>English Language Learner Assessment (AZELLA), ACT-Aspire, AzMERIT, AIMS Science, AIMSweb, and Brigance. As an additional note, SAWV will participate in all federal and state required assessment programs as directed by the State of Arizona and will comply with all required policies and procedures with regard to their administration and standardized practices.</p>	
<p><b>Summative Assessment Calendar for all subject areas:</b> Create an assessment calendar to set dates for the administration of all internal assessments at the initial, mid-year, and end-of-year benchmark periods.</p>	Principal	<p>Year Zero: Principal will create the Assessment Calendar during the planning and development phase of the school, in collaboration with Somerset Academy, Inc. Affiliate Support (as needed)</p>	<p>Assessment Calendar marking all dates for SAWV's internal assessments. All assessments as listed in section <i>A.3 Program of Instruction</i>.</p>
<p><b>Formative Assessments</b></p> <ul style="list-style-type: none"> <li>- Create a 'working document' assessment calendar based on the curriculum with dates for teachers to collect additional data.</li> </ul>	Principal with assistance from teachers	<p>Year 1 and each year afterwards</p>	<p>Assessment Calendar and lesson plans</p>
<p><b>Creation of Data Collection System:</b> Develop a database for the progress monitoring and analysis of all students.</p>	Education Support Organization (Data Support Department)	<p>Year Zero: Assessment Database created during the planning and development phase of the school and updated/maintained by the Education Support Organization</p>	<p>Assessment Database which instructors and administrators may use to monitor and analyze student data.</p>
<p>Align assessments to curriculum</p>	Principal & Teachers	<p>Year 1 and each year afterwards</p>	<p>Curriculum pacing guides/Curriculum maps Lesson plans</p>
<p>Create Data Teams to assist in monitoring student progress</p>	Principal  Data Teams (teachers, instructional coaches, specialists)	<p>Year One: Principal will facilitate the organization of</p>	<p>Data Teams reporting</p>

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<p>Create plan to communicate data to parents, family, and community members</p>	<p>Principal</p>	<p>data teams and outline procedures and expectations</p> <p>Year Zero: Principal will create plan to communicate data to all stakeholders</p>	<p>Data communications and announcements Written Notices and email Progress Reports Data Reports Parent Portal/Online Gradebook School Grades</p>
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### Process for Implementing Action Step

**Select formative and summative assessments:** Somerset Academy, Inc. from Florida has suggested the following assessments: iReady Reading and Math, DIBELS, Measure of Academic Progress (MAP), Galileo, The Arizona English Language Learner Assessment (AZELLA), ACT-Aspire, AzMERIT, AIMS Science. While these have been suggested by the Somerset Academy, Inc. and approved by SAWV's Governing Board, the Board still maintains the autonomy and ability to change assessments as they deem needed and/or necessary for the benefit of the students. As a public charter school, SAWV is also accountable to students, parents, the community and all stakeholders in its responsibility to provide an adequate and relevant education for all students. Thus, the school will participate in Arizona statewide assessment program and will use state standardized assessment scores, and school-based and district adopted assessments to measure student progress toward mastery of Arizona Academic Content Standards across all grade levels.

SAWV will participate in the statewide AzMERIT assessment program and will comply with all applicable requirements under Federal and State statutes. These assessments align with the school's curriculum, performance goals, and state standards in that they specifically assess those benchmarks being taught as well how individual students are progressing toward mastery of the standards. They also allow the school to assess, from a school-wide perspective, how the school is progressing towards meeting growth and academic targets and to inform parents on whether their child is gaining at least a year's worth of learning for every year spent in the charter school.

**Create an assessment calendar for Summative and Formative Assessments:** During SAWV's development year (June 2019 -August 2020), SAWV will work to establish dates for all assessments to occur in collaboration with the school's educational leaders (Principal, lead teachers, Curriculum Coaches) if selected by that time.

**Data Collection System:** Once assessments have been selected and a calendar has been created, SAWV's Educational Support Organization will develop and implement a database which will be accessible to all educational personnel in order to effectively monitor the progress of all SAWV's students.

**Create Data Teams:** Additionally, SAWV will form data teams comprised of grade level teachers and groups of instructors who teach similar content such as math, ELA, science, and social studies. The purpose of these data teams is to assist in monitoring student progress. Data teams will compile progress-monitoring data on a quarterly basis (or when evaluating instructional impact) and will disaggregate the results for cohorts. Data teams will meet monthly to evaluate data and correlate to instructional decision, review progress-monitoring data at grade level and classroom level to identify students and their academic levels; identify professional development to enhance students' achievement levels; collaborate, problem solve, share effective practices, evaluate implementation, make decisions, and practice new programs and skills; facilitate the process of building consensus, increasing infrastructure, and making decisions about implementation.

*Baseline and Interim Assessments* include a school-based assessment for Kindergarten, iReady Diagnostic screening to establish baseline at the beginning of the school year (K-5) in Reading and Mathematics and Baseline Interim Assessment (BIA) in Science (Grade 5). These will help to determine students' strengths and weaknesses on AZ Standards. Any available data from the student's previous school year (such as coursework, report card grades, Standardized assessments results (SAT-10/AZA and any applicable EOC's, teacher recommendation, etc.) will assist to establish determine placement including advanced/gifted classes.

The iReady Diagnostic will be administered 3 times per year to determine student needs and as an ongoing progress-monitoring tool to determine whether students are on track to achieve end-of-year targets in reading and mathematics. Mid-Year Assessments (MYA) administered in the second semester of the school year will be used to

target instruction on AZ Standards in ELA, Mathematics, Science, Social Studies, as well as to monitor ongoing student progress. MYA results reports (generated at the student, classroom, school level) will be used for differentiation of instruction, progress reporting, and as a measure for School Improvement Plan. The school will use iReady reports as a method of communicating with parents on whether their child is reading at grade level.

Additional evaluation methods to monitor student progress throughout the school year include:

- Teacher-generated quizzes and Assessments Rubric (AZA writing rubrics)
- Textbook adopted assessments (From reading curriculum/iReady)
- Quarterly Examinations, projects/investigations
- Portfolios and presentations
- UDL Design Framework (adaptations for ELL and SWD students)

**Assessment system aligned with curriculum:** The goal of a well-designed curriculum is to ensure that students have a range of opportunities to gain the knowledge, skills, and abilities required by the AZ state standards. SAWV will carefully select and create assessments that are carefully aligned to standards and curriculum. The principal and principal will collaborate to align assessments to content and grade-specific standards to accurately gauge whether or not a child has gained the knowledge and skills described in the AZ standards. Both large-scale summative assessments and classroom formative assessments will be carefully aligned to the curriculum.

**Create plan to communicate data:** The school will use various methods to share information with students and parents including the parent and student data chats. Ongoing communication between the School parents will be maintained through on-line reporting systems such, web-based grade book and progress reports, parent conferences, and other forms of written and oral communication that the parents may prefer. The school will also host open house meetings, parental workshops, and coordinate other appropriate methods of communication with parents/guardians, as necessary. The school will make every effort for communication to take place in the home language for those students from homes where a language other than English is spoken.

Specifically, the School will ensure communication with students/parents occur as follows:

- *Written Notices & Email* - Parents will be notified, in writing, at any time during a grading period when: it is apparent that the student is doing unsatisfactory work; when course or grade assignments drop abruptly or significantly; if a student is in jeopardy of failing a course, and/or if a student is in jeopardy of not meeting promotion criteria. Parents will also be notified in writing when a student is receiving instruction in an accelerated class or grade placement to include courses taken with Arizona Virtual School and/or other district-approved online courses. A copy of this notification will be placed in the cumulative record;
- *Phone & In Person* – Teacher and/or administrator will call parents with updates or concerns and/or request in-person conference. The school will also host open house at the beginning of the school year wherein they will make parents aware of policies, procedures, and how to request conferences. Parent conferences will be held as requested by parent or as deemed necessary by teacher or administration.
- *Interim Progress Reports* - Parents receive an interim report between grading periods, which indicate student progress by course and contains academic, behavioral and attendance data.
- *Parent Portal/ Online Gradebook* – Parents have access to all the child's grades/assignments in all subjects.
- *Data Reports* - Parents and students will be notified of student performance and progress through data reports (PM Tracking logs) Quarterly iReady and MYA Reports of student individual performance and progress.
- *School Grades* - (School Accountability Reports) will be made available to stakeholders and the community at-large via the School website and other means. The school will provide parents with assessment results on a yearly basis for each year their child participates in the state-mandated assessments. Following the release of assessment results, school personnel will disseminate the information to parents individually and following all student confidentiality procedures.

Additionally, the School will coordinate parent workshops to bring parents into the School and invite open dialogue. The School will coordinate other appropriate methods of communication with parents/guardians, as necessary, and the School will make every effort to communicate with parents in their home language.

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Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b>ii. Analyzing assessment data</b>			
<p>Establish assessments that will delivery data that will demonstrate how students are performing in reading, writing, math, and science.</p> <p>Assess instructional effectiveness in meeting the academic needs of all its students.</p>	<p>Principal Data Teams (teachers, instructional coaches, specialists) Instructional Staff</p>	<p>DIBELS/AIMS- 1x, Beginning of the year (Diagnostic)</p> <p>Monthly for Progress Monitoring (PM) of Tier I</p> <p>Bi-monthly for PM of Tier II</p> <p>Weekly for PM of Tier III</p> <p>MAP- 3x (beginning-, mid-, end-of year) for benchmarking</p> <p>iReady, - 1x, Beginning of the year (Universal)</p> <p>Monthly for Progress Monitoring of Tier I</p> <p>Bi-monthly for PM of Tier II</p> <p>Weekly for PM of Tier III</p> <p>AZELLA, - 1x, Beginning of the year (Language screening)</p> <p>AzMERIT, -1x, end of the year</p> <p>Galileo- 3x (beginning-, mid-, end-of year) for benchmarking and progress monitoring</p> <p>ACT-Aspire- 1x (Fall) for Periodic Testing</p> <p>2x (Fall and Spring) for Summative Testing</p> <p>AIMS Science- 1x, end of the year</p>	<p>Notes from weekly PLCs; FERPA-compliant weekly assessment results; other interim assessment reports as made available through each assessment program</p> <p>Student data folders and sheets</p> <p>Teacher data tracking</p>

## Academic Systems Plan Template

<p>Implement universal screening, benchmarking, diagnostic, and progress monitoring assessments in order to identify those students who failed demonstrate proficiency in specific subject areas and are in need of interventions</p>	<p><b>Instructional Staff</b>  Data Teams (teachers, instructional coaches, specialists)</p>	<p>DIBELS/AIMS-1x, Beginning of the year (Diagnostic)  Monthly for Progress Monitoring (PM) of Tier I  Bi-monthly for PM of Tier II  Weekly for PM of Tier III  MAP- 3x (beginning-, mid-, end-of year) for benchmarking  iReady, - 1x, Beginning of the year (Universal)  Galileo- 3x (beginning-, mid-, end-of year) for benchmarking and progress monitoring</p>	<p>Notes from weekly PLCs; FERPA-compliant weekly assessment results; other interim assessment reports as made available through each assessment program  Student data folders and sheets  Teacher data tracking</p>
<p>Create specific subject intervention groups for those students who have demonstrated academic deficiencies</p>	<p><b>Instructional Staff</b>  Data Teams (teachers, instructional coaches, specialists)</p>	<p>Specific subject intervention groups will be organized soon after results from the initial screening have been administered at the beginning of the school year</p>	<p>Intervention group tracking</p>
<p>Provide professional development, training, and support to school leadership and teachers in interpreting and using performance data to improve student learning</p>	<p>Grand Canyon University (Professional Development Partner)  Somerset, Inc. affiliate (non-profit organization providing Professional Development and Education Support services)  Principal  Instructional Leadership Team (principal, lead teachers)  Educational Support Organization (Data Specialist department)</p>	<p>Professional Development provided monthly and as needed by principal, Grand Canyon University, Data Specialist, and/or Somerset, Inc. affiliate in all areas of assessments and student interventions for all student subgroups and special populations</p>	<p>Professional Development agendas and presentation materials</p>

### Process for Implementing Action Step

**Assess instructional effectiveness:** As a public charter school, the School is also accountable to students, parents, the community and all stakeholders in its responsibility to provide an adequate and relevant education for all students. Thus, the school will participate in Arizona's statewide assessment program and will use state standardized assessment scores, and school-based and district adopted assessments to measure student progress toward mastery of AZ and NGSSS across all grade levels.

The School will participate in the statewide assessment program created under section. and comply will all applicable requirements. The school will adopt the Sponsor's Assessments calendar annually which directly aligns with the school's standards-based curriculum and all state and federal requirements. The School will thereby administer and use state standardized assessment and district-adopted assessments in each course offered (as required) to measure mastery of AZ Standards across all grade levels and monitor student performance. These assessments align with the school's curriculum, performance goals, and state standards in that they specifically assess those benchmarks being taught as well how individual students are progressing toward mastery of the standards. They also allow the school to assess, from a school-wide perspective, how the school is progressing towards meeting AMO targets and to inform parents on whether their child is gaining at least a year's worth of learning for every year spent in the charter school.

**Implement universal screening, benchmarking, diagnostic, and progress monitoring assessments:** SAWV teachers will screen students at the beginning of the year to determine current levels of academic performance. Once the data from these screeners have been analyzed and interpreted, instructional objectives will be determined. Along with state mandated assessments, a variety of data points will be collected. These data points will be assembled in data binders along with other student performance artifacts for the purposes of reporting individual student growth and progress for teacher and administrative use in creating meaningful and purposeful instructional activities to meet the needs of all students.

Select universal screeners and standardized assessments are used by SAWV to monitor students' academic progress, academic performance, and trend analysis. Commercially appropriate assessments and instruments will be used to assist in the development of daily lessons, weekly units of instruction, and short and long range instructional goals. SAWV will use one or more of the following assessments: DIBELS, Measures of Academic Progress (MAP), iReady, Arizona English Language Learner Assessment (AZELLA), and AzMERIT. Teacher created informal assessments, student portfolios, student projects and other authentic type assessments will be used to regularly monitor student progress.

Annually, teachers report to school at least one week in advance of their students. During this week, workshops are held daily and organized to target and tap the diversified needs of teachers, such as beginning teachers, teachers new to Somerset, the entire faculty, department or content specific workshops, etc. each with a set of criteria to be addressed and wherein disaggregating data training occurs, in a different way, at each of those meetings. This approach sets the tone for all faculty and staff, that the school is not only data-rich, but data-driven.

**Create specific subject intervention groups:** Specific subject intervention groups will be organized soon after results from the initial screening have been administered at the beginning of the school year

**Using Data to determine if instructional methodology and curriculum are meeting student needs:** Through the data collected from all the above assessments, teachers' feedback, and overall monitoring, SAWV leadership will determine if the instruction and curriculum is meeting the needs of the students in reading, writing, math, science, and social studies. As formative assessments and benchmark assessments aligned to the AZ state standards are given, the data will uncover if particular areas were not thoroughly addressed.

**Adjustments made if it is determined the needs are not being met:** If data demonstrates that adjustments need to be made in methodology and/or curriculum then the leadership team will address them at the moment, being sure to find other resources and activities to make sure that each area is taught and then reassessed. The goal is not to simply cover all the content but for the students to gain the knowledge and skills of the AZ state standards for each content areas. For the following year, the curriculum can be revamped by SAWV staff and Somerset leadership to make sure the issue is corrected for the following year. All areas including student engagement, lesson design, lesson preparation, lesson delivery/instructional methods, and classroom culture is accounted for in the adjustments.

**Provide professional development, training, and support:** Monthly in-house workshops will be held by administrators to address student achievement data by content area, and anecdotal information from in the core curriculum areas. Depending on the need, the School may elect to contract for delivery of a targeted PD to share best

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practices in areas that need to be remedied. Additionally, at least monthly, and as often as biweekly, team leaders will facilitate support and encourage communication during Department Meetings- which will work as Professional Learning Communities wherein team planning and troubleshooting will occur. Select teachers will attend local, state and national conferences and serve as trainer to the remainder of the staff, as applicable, upon return to the School.

The School Instructional Leadership team -which could consist of the principal, assistant principal, grade level chairs, ESE and ESOL Specialist, Reading/Curriculum Coach will oversee the data management process and provide support for teachers to make data including technology and resources to make data readily available. All teachers will receive specific training on data-driven decision-making process and procedures as well as Professional Development on how to interpret and use data to improve student learning.

As mentioned before, Somerset schools contracts a data specialist, who is available to meet with school leadership and/or faculty to review data and identify trends for a particular teacher or within the school. Data serves as a feedback system to guide teachers in lesson planning and individualizing instruction as well as to provide students with knowledge of their current levels of performance. The School will use data on an ongoing basis to inform instructional practices allowing for increased student learning outcomes as well as to inform students of their progress including strengths and opportunities for improvement. These actions will enhance instructional interventions by closely monitoring activities and aligning results with effective instructional decision-making.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<i>iii. Adapted to meet the needs of subgroups; and</i>			
Develop and implement corrective actions school-wide RTI assessment protocols to adapt instruction to meet the needs of subgroups	Principal  Data Team (teachers, instructional coaches, specialists)  Instructional Staff  Grand Canyon University (Professional Development Partner)  Somerset Academy, Inc. (non-profit organization providing Professional Development and Education Support services)	1x, Beginning of the year (Diagnostic)  Monthly for Progress Monitoring (PM) of Tier I  Bi-monthly for PM of Tier II  Weekly for PM of Tier III  MAP- 3x (beginning-, mid-, end-of year) for benchmarking  iReady, - 1x, Beginning of the year (Universal)  Monthly for Progress Monitoring of Tier I  Bi-monthly for PM of Tier II  Weekly for PM of Tier III  AZELLA, - 1x, Beginning of the year (Language screening)	Notes from weekly PLCs; FERPA-compliant weekly assessment results; other interim assessment reports as made available through each assessment program  Results from the initial screening assessments  Reports from intervention group activity; notes from group guides; assessment results  Student data folders and sheets  Teacher data tracking

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Develop systems to protect privacy of individual student academic performance data and other student-related information	Educational Support Service Provider (Data Reporting Department)  Principal  Teachers	AzMERIT, -1x, end of the year  Galileo- 3x (beginning-, mid-, end-of year) for benchmarking and progress monitoring  ACT-Aspire- 1x (Fall) for Periodic Testing  2x (Fall and Spring) for Summative Testing  AIMS Science- 1x, end of the year  Specific subject intervention groups will be organized soon after results from the initial screening have been administered at the beginning of the school year (August/September 2020)  Curriculum Assessments and Teacher-Generated Assessments ongoing  Professional development continuous as needed  "Data Days" at least once per quarter  Year Zero: Education Support Service Provider will develop data systems and apply industry standard information security protocols and services	Data reporting system reporting
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### Process for Implementing Action Step

**Develop and implement corrective actions:** Somerset is committed to serving the needs of all its students, regardless of level, learning style, and/or special needs. In support of our mission, the goal remains that all students attain and demonstrate mastery of the Arizona State Standards. As deemed necessary, according to student need, the school may employ Reading and/or Math coaches and adequate ELL and ESE personnel, and counseling staff to adequately support and properly service students as deemed necessary and according to needs. Classroom teachers will use research-based, state adopted texts, enhanced by supplementary materials and programs, to ensure student success and be required to document in lesson plans when and how each Arizona Standard is taught and assessed. Character education is infused in social studies to foster values and virtues of responsible world citizens. Free

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tutoring will be provided in the afternoons to fill any learning gaps while afterschool enrichment program will also offer creative projects aligned to ELA/Math and Science, Robotics club and various clubs to foster an academic culture and love of learning both in and out of the classroom in promoting the school's mission.

SAVV will also utilize a Multi-Tier System of Supports (MTSS) Response to Intervention (RtI) team composed of administrators, teachers, and specialists trained to use the MTSS/RtI Framework to effectively meet the academic and behavioral needs of all students. The school will implement strategies designed to address individualized learning needs, including educationally disadvantaged students and students with special needs who may be at-risk of falling behind. The School will screen all students to determine the academic needs in each tier so that instruction may be appropriately aligned for the students at the school. Teachers will be trained to continuously monitor student progress and make data-driven decisions for effective delivery of instruction. Specific interventions shall be initiated as soon as a student first demonstrates deficits in reading, mathematics or behavior. The team will determine the interventions matched to student needs using learning rate over time and level of performance. Through this process the team will plan, evaluate, and revise all tiers of instruction.

Tier I is inclusive of all students. All students in Tier 1 will receive high quality, scientifically based instruction, differentiated to meet their needs and will be screened at minimum in a bi-weekly basis to identify struggling learners who need additional support. Core academic interventions include the use of the core curriculum and whole-class instruction and interventions, following research-based instructional strategies and best practices. Core behavioral interventions would include school-wide discipline policies and procedures, as well as positive behavior supports. Academic assessments at the Tier 1 include iReady and Mid-Year Assessments in ELA, benchmark assessments, classroom and textbook assessments as well as summative/end of year assessments. Behavioral assessments at the Tier 1 include observational data, parent conference records and disciplinary data.

***Corrective Action:*** As was previously mentioned in sections above, the School will use RtI/MTSS framework as prevention oriented approach to linking assessment and instruction. Using real-time data from frequent assessments, the School will provide the necessary individual, classroom and/or school-wide intervention programs which include: requiring students to attend specific targeted tutoring during and after school; providing for supplemental intervention programs and support within the respective core course classrooms through academic coaching, lesson modeling, computerized intervention programs and pull out services (as needed).

All students, who exhibit significant risk, will be given intensive intervention as soon as that risk is identified and provided support. The students will continue to be given intensive intervention until the reading deficiency is remediated.

***Implementing Corrective Actions:*** If the School falls short of student academic achievement expectations or goals, the School will implement a corrective action plan under the direction of the administration (Principal) and the Instructional Leadership team described above.

**At the school-wide level:** The Instructional Leadership team will review school-wide data to determine school-wide areas in need of improvement. Faculty and Staff will work collaboratively through PLCs (by content area and grade level) to create the action plan including identifying strategies that were successful and strategies/curriculum/ and intervention processes that ought to be revised.

**At the Classroom Level:** The administration would determine (based on classroom/teacher data reports, observations and classroom walk-throughs) which teachers need additional support and provide professional development and or mentoring support accordingly. A plan for the teacher/ class would be implemented and documented through the teacher's lesson plans. Teachers would be expected to implement corrective action/change in intervention or content in the classroom with support from the administration.

**At the Sub-group, or individual student level:** The student's teachers and administrative team would review data (individual assessments/IEP or ELL Plans) and determine where instruction or interventions needs to be modified. Changes in intervention plan and/or varied strategies to target individual students' needs would be identified and communicated to the parents and documented by the teacher and in the student's ELL or IEP plan if applicable.

**Assessment data segregated into subgroups:** Data collected from the assessments mentioned above in addition to formative assessments will be segregated into subgroups at the classroom level as well as the school-wide level to evaluate if the instruction that is being delivered is meeting the needs of all groups. If the data of certain subgroups raise concern than the principal and teachers will collaborate to make necessary adjustments to the curriculum or instructional methods. The resource *Educating Everybody's Children: Diverse Teaching Strategies For Diverse Learners* by Robert W. Cole could be used to assist with over 100 research-backed strategies that assist teachers on how to reach students from economically, ethnically, culturally, and linguistically diverse groups. Additional small grouping, tutoring, or pullout groups could be established for additional support as well.

**Develop systems to protect privacy:** All permanent records of students leaving the school will be transferred to the district school in which the student is enrolled. All students leaving the school to attend an out of county school or a private educational institution shall have a copy of their permanent record forwarded to the school in which the student is enrolled. All permanent records remain in the last school in which the student was enrolled.

**Maintaining student records:** The school will act in accordance with Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. §1232g; 34 CFR Part 99) and maintain both student and financial records in accordance with Chapter 119, Arizona Statutes. The school will keep both active and archival records for current and former students in accordance with federal, state, local laws and with the regulations prescribed by the Arizona Department of Education. The school ensures that all student records will be kept confidential as required by applicable law. All student records (including IEP/504 and ELL plans) will be kept in locked, cabinets in the school's administrative office. School personnel must be authorized by an administrator to review any student records and a sign-in log is kept.

**Individual Student Academic Performance Data:** Students data is protected and can only be retrieved by the principal on a secure website. The data is presented by First and last Name and a partial state ID number. The individual data score sheet for each student is delivered in copies of 2: one is for the parent and the other is for the student's cumulative record. Teachers are able to access each of their own student's data by SPI, a program that contains only the teacher's student's scores via a secure website. Teachers will undergo an ethical training session as part of opening of school procedures, describing the information (including student's name and ID number) which cannot be shared with others; Teachers shall comply with State and Federal laws and regulations, and Board policies relating to the confidentiality of student records. Unethical conduct includes, but is not limited to, sharing of confidential information concerning student academic and disciplinary records, personal confidences, health or medical information, family status and/or income, and assessment/testing results.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b>iv. year to year comparison.</b>			
Develop system for year to year comparison of assessment will serve as a feedback system through year to year comparisons to: guide administrators, teachers, and SAWV Board in instructional focus areas	Principal  Data Team (teachers, instructional coaches, specialists)  Instructional Staff  Somerset Academy, Inc. (non-profit organization providing Professional Development and Education Support services)	1x, Beginning of the year (Diagnostic)  Monthly for Progress Monitoring (PM) of Tier I  Bi-monthly for PM of Tier II  Weekly for PM of Tier III  MAP- 3x (beginning-, mid-, end-of year) for benchmarking	Notes from weekly PLCs; FERPA-compliant weekly assessment results; other interim assessment reports as made available through each assessment program  Results from the initial screening assessments  Reports from intervention group activity; notes from group guides; assessment results

## Academic Systems Plan Template

	<p>Grand Canyon University (Professional Development Partner)</p> <p>Develop methods to relay student achievement data to all stakeholders</p>	<p>iReady, - 1x, Beginning of the year (Universal)</p> <p>Monthly for Progress Monitoring of Tier I</p> <p>Bi-monthly for PM of Tier II</p> <p>Weekly for PM of Tier III</p> <p>AZELLA, - 1x, Beginning of the year (Language screening)</p> <p>AzMERIT, -1x, end of the year</p> <p>Galileo- 3x (beginning-, mid-, end-of year) for benchmarking and progress monitoring</p> <p>ACT-Aspire- 1x (Fall) for Periodic Testing</p> <p>2x (Fall and Spring) for Summative Testing</p> <p>AIMS Science- 1x, end of the year</p> <p>Specific subject intervention groups will be organized soon after results from the initial screening have been administered at the beginning of the school year (August/September 2020)</p> <p>Curriculum Assessments and Teacher-Generated Assessments ongoing</p> <p>“Data Days” at least once per quarter</p> <p>Parent communication at least once per semester and continuous as needed</p>	<p>Student data folders and sheets</p> <p>Teacher data tracking</p> <p>Somerset Academy Student Performance Data clearinghouse and reporting systems</p> <p>Arizona Report Card</p>
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## Academic Systems Plan Template

<p>Development and Education Support services)</p>	<p>Results from the initial screening assessments</p> <p>Reports from intervention group activity; notes from group guides; assessment results</p> <p>Student data folders and sheets</p> <p>Teacher data tracking</p> <p>Somerset Academy Student Performance Data clearinghouse and reporting systems</p> <p>Arizona Report Card</p>
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### Process for Implementing Action Step

**Develop system for year to year comparison:** Student assessment and performance data will be used to not only evaluate school effectiveness but more importantly to inform continuous improvement efforts by targeting benchmarks indicating which students need additional support to master specific standards and/or grade level skills. The school is committed to continuous improvement through *year to year comparisons* and will ensure that responsibility is aligned with accountability and that all stakeholders are involved achieving the schools mission and vision for our students. The school's comprehensive assessment program (described above) will be used to inform stakeholders (students, parents, and teachers) about where a student is succeeding and what areas need strengthening.

Assessment will serve as a feedback system through year to year comparisons to:

- guide administrators in instructional focus areas and which teachers may need additional PD and support
- to guide teachers in lesson planning and individualizing instruction
- to guide students in understanding their own progress towards of each respective standard
- to keep parents involved and informed about student achievement and progress.

**Data collection for year to year comparison:** Although all data will be used to evaluate curriculum, instruction, and the meeting of AZ state standards, the data that will be used to do a year to year comparison of different subgroups, individual student progress, and school-wide results will be the i-Ready, AzMERIT and AIMS. These assessments will provide a reliable compassion of student growth and proficiency in reading, writing, math, and science.

**Analysis completed:** The analysis completed during the year to allow for valid and reliable comparison form year to year in reading, writing, math, and science has several factors. The above assessments can be compared horizontally as they are the same year to year and represent the same AZ state standards. They can also be compared vertically since they are calculated in the same ways each year. Data comparability lets teachers, administrators, and other stakeholders make important connections, recognize growth patterns and trends, develop achievable growth projections, and compare groups of students. Somerset Academy Inc. has access to a data specialist to assist the school in collecting, disaggregating and processing school wide and individual teacher/student performance and achievement data, on an on-going and consistent basis. At the beginning of each school year and at least quarterly, the data specialist will work collaboratively with the school to generate meaningful reports on assessment data to identify areas of instructional weaknesses pinpointing thresholds of student progress. State standardized assessments will be used to determine mastery of content standards and make decisions regarding school-wide improvement from year to year. The data specialist will also share data with schools and with the governing board to identify trend data and assist the governing board to identify necessary and targeted support that might be needed across Somerset schools.

**Develop methods to relay student achievement data:** Accordingly, the responsibility to manage, evaluate and interpret student data will be a collaborative effort as follows:

- Students are assessed at the beginning of the school year on all benchmarks (as described above)
- Administrative staff and lead teachers collect and disaggregate data on an on-going and consistent basis (bi-weekly, after every quarterly assessment, and ongoing throughout the school year). I-Ready and other data tracking reports are generated by student, by standard, by teacher, and school-wide results are immediately available to teachers to target instruction and make adjustments as necessary.
- Teachers are trained on how to properly analyze the data and log in the individual student data folder.
- Teachers then use the data folders to group students by strengths and weaknesses for differentiated instruction and intervention. (Evidenced in their lesson plans).
- During their differentiated instruction centers/intervention, students receive remediation in the skills they are weakest in and are reassessed to determine progress.
- Periodically and as necessary in the course of classroom instruction, students are moved between groups in order to ensure that their learning needs are being met and that they are progressing towards mastery.
- *Data Tracking:* students will use personal data trackers to track their growth data by benchmark. Data folders are sent home for parents to review, sign and return to the teacher.
- *Data chats:* the administrative team manages the process by conduction data chats with teachers on classroom data, while teachers conduct ongoing individual data chats with students. As necessary, teachers communicate with parents via phone or in person conference.

### AREA III: Monitoring Instruction

Complete the plan for each of the five sections. Provide **sufficiently detailed and implementable action steps** that address each of the following elements of a comprehensive system for monitoring instruction:

- i. *monitoring instruction;*
- ii. *evaluating instructional practices;*
- iii. *adapted to meet the needs of subgroups; and*
- iv. *providing feedback that develops the quality of teaching and standards integration.*

For each Action Step you add, ensure all fields have been completed.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b>i. monitoring instruction</b>			
Conduct ongoing observation of classroom instruction to ensure the delivery of rigorous academic lesson plans aligned to AZ Standards and providing feedback to teachers.	Principal	Informal classroom walkthroughs conducted weekly  Formal classroom observation and feedback cycles will be conducted at least three times per year	Walkthrough Data  Observation Log  Teacher Observation and Feedback Forms
Support and guidance provided to employ and monitor teachers' use of strategies to continuously	Somerset Academy, Inc. Affiliate (non-profit organization providing Professional Development	4 times per year/Year 1 3 times per year/Year 2 2 times per year/Year 3	Meeting agendas and notes

## Academic Systems Plan Template

<p>monitor, evaluate, and improve both the curriculum and the methods used in its delivery to achieve continuous student improvement year to year.</p> <p>Utilize variety of student data points for evaluation and monitoring of instruction (Data Chats).</p>	<p>and Education Support services)</p> <p>Principal</p> <p>Principal</p> <p>Instructional Staff</p>	<p>Ongoing review (at least quarterly) of student performance and benchmark data</p>	<p>Data Chat agenda and notes</p> <p>Student data reporting and data analysis</p>
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### **Process for Implementing Action Step**

SAVV leadership team embraces the observation and feedback cycle as a means to supporting teacher development and improving student learning. Through classroom observations of teacher practice and ongoing discussions of student data, administration and teachers establish a shared vision of effective teaching and its impact on student learning.

**Conduct Ongoing Observation:** School leadership at SAVV will conduct informal and/or formal classroom observations on a weekly basis. Data collected from these classroom walkthroughs will be used to provide feedback on the learning objectives aligned to Arizona Standards, grade level appropriateness of lessons, appropriate higher level thinking strategies and appropriate use of texts and materials. Instructional strategies, classroom management skills, and engagement of learners in the classroom will also be observed and teacher performance will be evaluated as a means to inform instruction and provide for professional growth opportunities. Observation and feedback cycles will be conducted with teachers at least three times per year. During the observation and feedback cycle, SAVV leadership will observe and gather evidence of teacher practice, discuss evidence and feedback from the observation, and create plans for improving classroom instruction.

**Classroom instruction aligned with standards and allows for students to effectively master standards:** Each SAVV teacher is expected to have the Common Board Configuration (CBC) in their classroom and updated daily. This includes items such as the AZ State standard that is being covered that day and the essential questions (which align with the AZ standards). These will also be included in the lesson plans, however, the visual display in the classroom is a reminder to both the teacher and the students, as well as administrator who visit, to which standard(s) will be taught that day. Evidence such as “backward design” where teachers plan using a framework of considering students’ prior knowledge in relation to standards and then aligning to instruction will allow students to master standards in a coherent instructional framework. As noted previously, Somerset does not aim to simply cover standards. Great care is taken to train staff members and to coach them to make sure that instruction and assessments is aimed at students mastering standards.

**Adjustments made to curriculum and instruction for subgroup populations:** It is important that teachers design opportunities for students to learn content in ways that support their learning styles, different levels of understanding, and prior knowledge and misconceptions. Both principals and teachers are trained in diverse teaching strategies, following more than 100 research-backed and teacher-tested strategies that assist teachers on how to reach students from economically, ethnically, culturally, and linguistically diverse groups. The resource book *Educating Everybody's Children: Diverse Teaching Strategies for Diverse Learners* by Robert W. Cole is incorporated into all curriculum subject areas. Subject-specific strategies for math, science, reading, writing, and social studies are incorporated from this resource.

**Support and Guidance on Monitoring Instructional Practices:** Somerset Academy Inc.'s Affiliate staff will provide ongoing support and guidance to the leadership team of SAWV in monitoring teachers' use of strategies to continuously monitor, evaluate, and improve both the curriculum and the methods used in its delivery to achieve continuous student improvement year to year. This support will be provided at quarterly to the SAWV leadership team or as requested. Meeting agendas will be provided and notes will be maintained of these affiliate support meetings.

**Utilize a Variety of Student Data Points to Inform and Evaluate Instruction:** Student progress will also be a means in which instruction will be monitored. SAWV will conduct Data Chats with teams comprised of grade level teachers and groups of instructors who teach similar content such as math, ELA, science, and social studies. The purpose of these data teams is to assist in monitoring student progress for all subgroup populations. Data teams will compile progress-monitoring data on a quarterly basis (or during interim testing and when evaluating instructional impact) and will disaggregate the results. Data teams will meet monthly to evaluate data and correlate to instructional decision, review progress-monitoring data at grade level and classroom level to identify students and their academic levels; identify professional development to enhance students' achievement levels; collaborate, problem solve, share effective practices, evaluate implementation, make decisions, and practice new programs and skills; as well as facilitate the process of building consensus, increasing infrastructure, and making decisions about implementation.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<i>ii. evaluating instructional practices</i>			
Adopt a teacher evaluation rubric aligned to Arizona's Framework for Measuring Educator Effectiveness	Principal  SAVV Governing Board (volunteer governing board)	August 2020	Evaluation Rubric Board Agenda & Minutes
Provide professional development to teachers on the evaluation rubric	Somerset, Inc. affiliation (non-profit organization providing Professional Development and Education Support services)	August 2020 (and the start of each school year for new staff to the school)	PD Agendas Sign in sheets Training materials
Analyze student data for teacher effectiveness	Principal  Instructional Staff	Minimum of three times per year (benchmark data) Once per year (state mandated assessment data)	Data analysis documentation  AzMerit student performance data disaggregated by performance level descriptors
Formally evaluate each employee annually by completing the adopted evaluation rubric	Principal  Instructional Staff  Data Team (teachers, instructional coaches, specialists)	Annually	Completed observation documents Completed evaluations

## Academic Systems Plan Template

<p>Develop a Classroom Walkthrough protocol which includes expectations of curriculum implementation, levels of questioning, and rigor</p> <p>Provide ongoing professional development on adopted curriculum</p> <p>Monitor SAWV implementation of curriculum that is rigorous and vital for every child's scholastic success infused with a focus on literacy and 21<sup>st</sup> Century Skills.</p> <p>Assess students using an external assessment and using curriculum based measure</p>	<p>Principal Lead teachers</p> <p>Principal</p> <p>Principal Instructional Staff Somerset, Inc. affiliation (non-profit organization providing Professional Development and Education Support services)</p> <p>Principal Instructional Staff Data Team (teachers, instructional coaches, specialists)</p>	<p>Fall 2020</p> <p>Fall of 2020 and ongoing throughout the school years</p> <p>Year One: Fall 2020 data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards throughout the school year Year Two: Continued data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards throughout the school year Year Three: Continued data collection and analysis with the support of Somerset Inc. Affiliate in evaluating the effectiveness of the adopted curriculum and supplemental materials aligned to AZ Standards throughout the school year</p> <p>Three times per year for benchmark assessment and ongoing for curriculum based measures</p>	<p>Adopted Walkthrough protocol</p> <p>Curriculum training materials Sign in sheets</p> <p>Curriculum implementation Observation data and fidelity classroom walkthrough data Teacher lesson plans AzMerit student performance data disaggregated by performance level descriptors School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis</p> <p>Assessment results Notes from Data Chat</p>
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### Process for Implementing Action Step

SAVV will provide quality instruction, high expectations, and consistent standards-based curriculum for all students in alignment with the Somerset mission and vision. The content will be challenging for all students and based on the expectation that all students can achieve high standards if given stimulating opportunities and differentiated instructional support. Focusing on the school's mission of individualizing instruction and maximizing learning for all students, teachers will be trained to use varying instructional strategies to address diverse learning styles so that all students will benefit from the curriculum, including students who enter the school below grade level.

**Consistently integrate curriculum into instruction:** The faculty of the school will develop a scope and sequence or pacing guide for each course. SAWV teachers and principal will receive support in Professional Development for setting this process up through the Somerset Inc. affiliation. This tool serves as the basis for lesson plan development to ensure that all benchmarks are addressed in a timely manner. The scope and sequence or pacing guide will largely be aligned to the basal text. Teachers will develop and/or provide additional resources such as novels of varying genres, as may be necessary, to teach benchmarks not adequately addressed in the basal text. The faculty of the school will also develop a reading and mathematics instructional focus calendar to provide a framework which enables all faculty and support staff to simultaneously address the same standards.

As teachers plan at grade levels and individually, they will make sure to identify:

4. The overall goal of the Lesson/Unit;
5. What students will understand as a result; and
6. Measurable objectives that align with the: 1). Content Strand (s) and 2) Art Strand.

Curriculum and instruction are both shaped by expectations about the kinds of educational outcomes that are set forth. AZ state standards are always kept in mind while implementing the curriculum as they dictate the knowledge and skills that students are expected to gain. The curriculum is 'the plan' that is used to achieve those goals. The curriculum is not meant to be a script as teachers, school leaders, and data that is continually collected on each student will drive the instruction to keep students engaged as well as to meet each student at his or her level. The curriculum is the road map however the students (with the teacher as the guide) are the drivers.

**Implementing Curriculum with fidelity:** SAWV and the board believe that curriculum fidelity is critical to ensure that the interactions and activities that make up a curriculum result in positive outcomes like increasing student achievement scores. This includes school-wide fidelity which is monitored by the principal to ensure that teachers are consistently and regularly implementing the key elements of the curriculum. This is addressed at faculty meetings and grade level meetings. In addition, individual lessons must show the in-the-moment information about the way a curriculum activity is going to be implemented each day. Lesson plans are written by teachers and monitored by the grade level chair and/or the principal. Furthermore, initial training on the curriculum is essential as well as practice-based support with modeling in addition to ongoing mentoring and opportunities for self and peer reflection.

**Adopt a Teacher Evaluation Rubric:** In order to evaluate instructional practices, SAWV will adopt and gain approval from the governing board in the fall of 2020 for a research based teacher evaluation rubric which aligns to the Arizona Professional Teaching Standards. The Arizona Department of Education Teacher Model for Measuring Educator Effectiveness utilizes the four domains in the 2013 Charlotte Danielson Framework for Teaching:

- Planning and Preparation
- Classroom Environment
- Instruction
- Professional Responsibilities

In addition to data (which is explained below), the effectiveness of instructional practices and the quality of instruction will be gathered and assessed through the teacher evaluation rubric.

**Provide Professional Development to Teachers:** To provide SAWV teachers with a complete understanding of how their performance is being measured, professional development will be conducted at the start of the school year based on the evaluation rubric. The purpose of this professional development is to communicate clearly defined expectations, to explain the process of using the evaluation process to drive professional learning and enhance student performance, and to foster a culture where student learning and growth mindset are used as a continual part of redefining goals for students and teachers.

**Data to be used to evaluate the effectiveness of instructional practices and measure instructional quality:** At SAWV we believe that there is a direct correlation between teacher performance and student outcomes. Student assessment and performance data will be used to not only evaluate school effectiveness but also to measure instructional quality and effectiveness of each teacher. Progress will be monitored to ensure students are meeting academic goals and inform decision on adjustments necessary to ensure student success.

SAVV will form data teams comprised of grade level teachers and groups of instructors who teach similar content such as math, ELA, science, and social studies. The purpose of these data teams is to assist in monitoring student progress. Data teams will compile progress-monitoring data on a quarterly basis (or during interim testing and when evaluating instructional impact) and will disaggregate the results for cohorts. Data teams will meet monthly to evaluate data and correlate to instructional decision, review progress-monitoring data at grade level and classroom level to identify students and their academic levels; identify professional development to enhance students' achievement levels; collaborate, problem solve, share effective practices, evaluate implementation, make decisions, and practice new programs and skills; as well as facilitate the process of building consensus, increasing infrastructure, and making decisions about implementation.

Administrators and data teams will use data analysis to collaboratively develop instructionally focused calendars with timelines for addressing targeted strands as denoted in assessed benchmarks. Instructors will adjust their instruction, monitor student progress, and select appropriate classroom activities to work on student deficiencies and to guide differentiated instruction.

Assessment will serve as a feedback system to:

- ✓ guide administrators in instructional focus areas and which teachers may need additional PD and support
- ✓ to guide teachers in lesson planning and individualizing instruction
- ✓ to guide students in understanding their own progress towards of each respective standard
- ✓ to keep parents involved and informed about student achievement and progress.

Furthermore, Somerset Academy Inc. has access to a data specialist to assist the school in collecting, disaggregating and processing school wide and individual teacher/student performance and achievement data, on an on-going and consistent basis. At the beginning of each school year and at least quarterly, the data specialist will work collaboratively with the school to generate meaningful reports on assessment data to identify areas of instructional weaknesses pinpointing thresholds of student progress. State standardized assessments will be used to determine mastery of content standards and make decisions regarding school-wide improvement from year to year. The data specialist will also share data with schools and with the governing board to identify trend data and assist the governing board to identify necessary and targeted support that might be needed across Somerset schools.

The aforementioned process has proven to be highly effective in our other high-performing Somerset schools, as it gives students, parents and teachers a clear understanding of how students are performing and facilitates open communication and an understanding, by all parties, as to how best support our students.

communication and an understanding, by all parties, as to how best support our students.

Components of student data used for evaluation and monitoring of instruction:

- ✓ Student Achievement: Grade level proficiency and content mastery
- ✓ Student Growth: Student growth percentile (SGP) is used to compare student growth to their academic peers on a national scale

**Formally Evaluate Teachers Annually:** SAWV leadership will use evidence collected from classroom walkthroughs, evaluation cycles, and student data to complete the annual evaluation. Following Arizona's Model for Measuring Educator Effectiveness Guidelines, SAWV leadership will Summative Evaluation Conference. The evaluator (SAVV leadership) will discuss the results and evidence aligned to the adopted teacher evaluation rubric and identify future professional goals for the teacher to focus on improvement and growth.

Core content will be delivered using **instructional materials** that have proven successful at Somerset Academy Inc. schools throughout the county. The governing board, Somerset Academy Inc.'s administrative staff, and SAWV

leadership will oversee the implementation and provide monitoring, evaluation and feedback of the following practices/activities to ensure that the program is implemented with fidelity.

Curriculum effectiveness is determined by the extent to which a curriculum programs are implemented to produce positive outcomes for students in relation to Arizona State Standards. Implementation of curriculum will primarily be monitored for effectiveness through lesson plan reviews, classroom walkthrough data, and data analysis based on multiple measures. Curriculum effectiveness depends in part on if it is implemented adequately and how it fits within the grade-level band for which it is designed as well as whether it fits with the educational contexts that proceed or follow it.

**Develop a Classroom Walkthrough Protocol:** In the Fall of 2020, SAWV administration and leadership team will develop a Classroom Walkthrough Form to identify areas of strengths and opportunities for improvement in curriculum implementation. The walkthrough form might include such indicators as students using adopted text, answering high levels of questions, collaborating with each other, and showing evidence of learning based on the learning objective of the lesson.

**Provide Ongoing Professional Development:** In order to 'set teachers up for success', opportunities for professional development on adopted curriculum will be provided to teachers. The professional development will be provided prior to implementation, continued support during implementation, and reflective time both during and after implementation. Different types of professional development will be provided which focus on content, pedagogy, and assessment.

**Monitor Effectiveness of Implementation of Curriculum:** Monitoring effectiveness of the implementation of curriculum will be accomplished through data collection during Classroom Walkthroughs and data analysis. Using the adopted Classroom Walkthrough protocol, data will be collected to look for trends among grade levels and content areas. These trends will be the driving force behind further professional development to the staff. A review of lesson plans can also be included which focuses on lesson alignment within a research based scope and sequence and appropriateness of learning targets for specific grade levels and content areas.

**Assessing Students:** The ultimate goal of curriculum evaluation is to ensure that the curriculum is effective in promoting improved quality of student learning. Student assessment therefore translates to assessment of student learning. Assessment of student learning has always been a powerful influence on how and what teachers teach and is thus an important source of feedback on the appropriateness implementation of curriculum content.

Assessment of student learning can be both formative and summative. Formative assessment is the process by which teachers adjust ongoing teaching and learning to improve student achievement. It is conducted during the learning process in order to modify teaching and learning activities to improve student attainment. Formative assessment is often coined as 'assessment during learning', whereas summative assessment is considered 'assessment of learning'. Evaluation of formative assessment is done during classroom observations where an evaluator will elicit evidence of learning. Summative assessments are given to students at the end of the unit or end of the year. SAWV teachers will use results from summative assessment during Data Chats to determine student mastery and next steps.

In addition, SAWV will assess students during three benchmark periods (Beginning, Mid-Year, End of Year) to track student progress and evaluate curriculum. The iReady Diagnostic will be administered 3 times per year to determine student needs and as an ongoing progress-monitoring tool to determine whether students are on track to achieve end-of-year targets in reading and mathematics. Mid-Year Assessments (MYA) administered in the second semester of the school year (as described above for 3-5) will be used to target instruction on AZ Standards in ELA, Mathematics, Science, as well as to monitor ongoing student progress. MYA results reports (generated at the student, classroom, school level) will be used for differentiation of instruction, progress reporting, and as a measure for School Improvement Plan.

**Using teacher evaluation data to identify strengths, weaknesses, and needs of individual teachers:** SAWV believes that improving teacher quality we will improve student learning outcomes. Continuous growth and improvement is necessary for everyone. Conducting meaningful evaluations is often the first step, which involves a

## Academic Systems Plan Template

number of observations to see the entire picture of what a teacher is doing in their classroom. The information from these evaluations must lead to constructive feedback and suggestions to help teachers improve as well as acknowledgment/praise of the areas where they are strong. This data also leads to meaningful professional development that is specific to that individual teacher's needs. Furthermore, evaluations can uncover if a teacher is lacking resources. School leaders must be able to give their teachers resources they need to effectively deliver quality instruction. Teacher evaluation data also serves as a basis for teacher grouping for Professional Learning Communities as well as mentorship. A strong veteran teacher can provide tremendous insight and encouragement to an inexperienced or struggling teacher by allowing teacher to teacher observations, sharing of best practices and building a trusting relationship.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b>iii. adapted to meet the needs of subgroups</b>			
Assess students using benchmark assessment to identify strengths and areas of need; Assess students to monitor progress	Instructional Staff	Students in Tier 1- Universal screener 3 times per year, progress monitoring monthly Students in Tier 2- Universal screener 3 times per year, progress monitoring bi-monthly or weekly Students in Tier 3 screened at minimum in a bi-weekly basis	Teacher lesson plans RTI and intervention plans and progress monitoring PLC Agendas and Notes Professional Development Agendas and Notes Teacher evaluations Walkthrough data Student data reporting and data analysis Student report cards/progress reports
Develop RtI plans and interventions for struggling students; Implement interventions and monitor progress for effectiveness Somerset Academy, Inc. Affiliate support and guidance in employing and monitoring SAWV teachers' use of utilizing research-based strategies proven to improve student performance for all populations, including English Language Learners (ELLs) and students with disabilities	MTSS/RtI Team  Instructional Staff  Paraprofessionals Somerset Academy Inc. Affiliate (non-profit organization providing Professional Development and Education Support services)	Ongoing throughout the year  4 times per year/Year 1 3 times per year/Year 2 2 times per year/Year 3	RtI Plans Intervention Logs Assessment Data  Agendas & Meeting Notes
Evaluate lesson plans to ensure alignment to AZ Standards and delivery of academic lessons adapted to meet the needs of subgroups and providing feedback to teachers	Principal  Instructional Staff	Ongoing throughout the year	Lesson Plans Observation Notes Observation Logs

### Process for Implementing Action Step

Core content will be delivered using ***strategies and best practices in meeting the needs of subgroups*** that have proven successful at Somerset Academy Inc. schools throughout the county. The governing board, Somerset Academy Inc.'s administrative staff, and SAWV leadership will oversee the implementation and provide monitoring, evaluation and feedback of the following practices/activities to ensure that the program is implemented with fidelity:

Somerset is committed to serving the needs of all its students, regardless of level, learning style, and/or special needs. In support of our mission, the goal remains that all students attain and demonstrate mastery of the AZ Standards. As deemed necessary, according to student need, the school may employ Reading and/or Math coaches and adequate ELL and ESE personnel, and counseling staff to adequately support and properly service students as deemed necessary and according to needs. Classroom teachers will use research-based, adopted texts, enhanced by supplementary materials and programs, to ensure student success and be required to document in lesson plans when and how each AZ Standard is taught and assessed. Character education is infused in social studies to foster values and virtues of responsible world citizens. Free tutoring will be provided in the afternoons to fill any learning gaps while afterschool enrichment program will also offer creative projects aligned to ELA/Math and Science, Robotics club and various junior honor societies to foster an academic culture and love of learning both in and out of the classroom in promoting the school's mission.

Students learn in a variety of ways and should be given the opportunity to learn with a variety of different strategies and techniques that are adapted and to meet the needs of the target student population and achieve the school mission and vision teachers will:

- ✓ Create a school environment where all students feel a sense of belonging, where students feel safe and supported
- ✓ Provide student-centered instruction using Differentiated Instructional (DI) Strategies
- ✓ Use Technology in all content areas
- ✓ Provide remediation and enrichment programs
- ✓ Offer co-curricular and extra-curricular programs
- ✓ Deliver targeted after-school tutoring programs
- ✓ Arrange counseling and other specialized services

Teachers will create a culture of high academic and behavioral expectations for all; expect parental involvement, build strong and supportive leadership team and a dedicated faculty/staff who believe in the mission and vision. To support attainment of the state-adopted standards for our intended student population, the school will provide:

**Assess All Students:** Tier I is inclusive of all students. All students in Tier 1 will receive high quality, scientifically based instruction, differentiated to meet their needs and will be screened at minimum in a bi-weekly basis to identify struggling learners who need additional support. Core academic interventions include the use of the core curriculum and whole-class instruction and interventions, following research-based instructional strategies and best practices. Core behavioral interventions would include school-wide discipline policies and procedures, as well as positive behavior supports. Academic assessments at the Tier 1 include iReady and Mid-Year Assessments in ELA, benchmark assessments, classroom and textbook assessments as well as summative/end of year assessments. Behavioral assessments at the Tier 1 include observational data, parent conference records and disciplinary data.

**Develop RtI Plans and Interventions:** The school will have a Multi-Tier System of Supports (MTSS) Response to Intervention (RtI) team composed of administrators, teachers, and specialists trained to use the MTSS/RtI Framework to effectively meet the academic and behavioral needs of all students. The school will implement strategies designed to address individualized learning needs, including educationally disadvantaged students and students with special needs who may be at-risk of falling behind. The School will screen all students to determine the academic needs in each tier so that instruction may be appropriately aligned for the students at the school. Teachers will be trained to continuously monitor student progress and make data-driven decisions for effective delivery of instruction. Specific interventions shall be initiated as soon as a student first demonstrates deficits in reading, mathematics or behavior. The team will determine the interventions matched to student needs using learning rate over time and level of performance. Through this process the team will plan, evaluate, and revise all tiers of instruction.

***Services for students below grade level and/or at risk of failure:*** In Tier 2, students not making progress in the core curriculum will be provided with increasingly intensive instruction matched to their needs including, but not limited to:

- ✓ Progress monitoring through data tracking logs using the ELA curriculum resources and iReady Standards Mastery
- ✓ Small group instruction, one-to-one re-teaching, pull-out intervention, individualized, intensive interventions that address each student's needs;
- ✓ Additional tutoring opportunities with qualified interventionist using research based interventions including summer time remediation and Saturday tutoring
- ✓ Assessments at this level include behavioral observations, intervention data and gap analysis, in accordance with AZ guidelines.

### *Academic Support in ELA and Mathematics*

The school will evaluate students and provide academic support through Intensive Reading and Intensive Mathematics courses for grades students. In grades K-5, Interventionist (teachers and qualified paraprofessionals) will work with students and provide intense individualized interventions.

### *Services for Students with special needs*

The Somerset Academy model allows educationally disadvantaged students including Students with Disabilities and students entering below grade level, to benefit highly from the core curriculum. Students with Disabilities must be supported and challenged to excel within the general curriculum and be prepared for success in their post-school lives, including college and/or careers. In order to accomplish this, Somerset will commit to instruction that incorporates supports and accommodates students including:

- 1) An Individualized Education Plan (IEP) for Special Education and progress monitoring Plan for students below grade level proficiency, which include annual goals aligned with and chosen to facilitate their attainment of grade-level academic standards;
- 2) Teachers and specialized instructional support personnel who are prepared and qualified to deliver high quality, evidence-based, individualized instruction and support services;
- 3) Instructional accommodations in materials or procedures - which do not change the standards but allow students to learn within the framework of the Arizona Standards;
- 4) Assistive technology devices and services to ensure that students with special needs have equal learning and developmental opportunities; 5) Instructional supports for learning based on the principles of Universal Design for Learning (UDL), which foster student engagement by presenting information in multiple ways and allowing for diverse avenues of action and expression. In addition to providing the specific services listed in a student's IEP and/or ELL plan, schools offer tutoring services or other such assistance to ensure students remain successful.

### *Support Services for Advanced Learners*

The school will provide advanced coursework as needed to serve the student population. The school will conduct screening to determine placement in advanced coursework. At the elementary levels this includes a school-based assessment for Kindergarten students upon registration and i-Ready diagnostic screening to establish baseline at the beginning of the school year. For grades 1-5, previous year's data (such as previous coursework, report card grades, Standardized assessments results as well as teacher recommendation will determine placement for advanced/gifted classes.

The school will offer advanced/gifted as needed in grades K-5. Students will be encouraged to enroll in advanced/honors mathematics and science courses based on data from previous years, potential and teacher recommendation. Advanced learners will have access to Project-based Learning opportunities throughout all curriculum areas; Enrichment opportunities afterschool through Clubs (national honor societies/robotics competitions etc.); Acceleration: (e.g. enrichment, world immersion activities (i.e. as science and Social Science fairs, music and art exhibits, academic competitions, mentoring, career exploration and goal setting integrated into the curriculum); Differentiation: (e.g. curriculum compacting, modifications of content through differentiated curriculum).

**Guidance and Support from Somerset Academy Affiliate:** Somerset Academy Inc. will provide support and guidance of monitoring and evaluation of meeting the needs of subgroups. Focuses support will include:

- ✓ Teacher utilized flexible grouping.
- ✓ What types of flexible grouping were utilized (i.e. pairs, small groups, and/or independent practice)?
- ✓ Teacher differentiated instruction for all levels of learners.
- ✓ Did the teacher scaffold instruction for special education students and/or ELL students?
- ✓ Example of how the teacher differentiated instruction for learners:

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- ✓ Assignments/assessments were meaningful, rigorous, and at/above grade level.
- ✓ Teacher grade book reflected meaningful, rigorous, and at grade level assignments/assessments.
- ✓ Teacher provided an explicit closure to ensure mastery of lesson objectives.
- ✓ How did the teacher conduct a review and emphasize the important points of the lesson?
- ✓ Teacher utilized technology in the lesson.
- ✓ Teacher maintained appropriate pacing throughout the lesson to engage students.

**Evaluation of Lesson Plans and Classroom Instruction:** SAWV leadership will review lesson plans and monitor classroom instruction to ensure differentiated instruction is embedded into daily practices to meet the needs of diverse learners. Feedback will be provided to teachers based on lesson planning and lesson delivery.

**Ensuring instruction meets the needs of students in all subgroups:** SAWV has researched both the ethnic demographics of the target population in addition to student subgroups (ELL, Free/Reduced Lunch, SWD). With over 20 years of experience, Somerset realizes that student needs can differ between subgroups. For that reason, both principals and teachers are trained in diverse teaching strategies, following more than 100 research-backed and teacher-tested strategies that assist teachers on how to reach students from economically, ethnically, culturally, and linguistically diverse groups. The resource book *Educating Everybody's Children: Diverse Teaching Strategies For Diverse Learners* by Robert W. Cole is incorporated into all curriculum subject areas. Subject-specific strategies for math, science, reading, writing, and social studies are incorporated from this resource. Data collected from both student assessments as well as teacher evaluations will be used to evaluate if the instruction that is being delivered is meeting the needs of all groups. If the data of certain subgroups raise concern than the principal and teachers will collaborate to make necessary adjustments to the curriculum or instructional methods. Additional support, professional development, and/or peer mentoring will be put in place for any teacher that is not meeting the need of all the different subgroups of students.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b>iv. <i>providing feedback that develops the quality of teaching and standards integration</i></b>			
Seek rigorous training and obtain skill development in providing effective leadership to teachers	Principal	August 2020 and ongoing throughout the year	Training notes Observation log and observation notes
Develop a Classroom Walkthrough protocol which includes expectations of curriculum implementation, levels of questioning, and rigor	Principal Instructional Staff	Fall 2020	Adopted Walkthrough protocol
Provide feedback to teachers based on classroom environment expectations, assessment of instructional needs, planning rigorous academic lessons, and delivering rigorous academic lessons aligned to AZ Academic Standards	Principal Instructional Staff	Annually for experienced/lead teachers  Informal observations through classroom walkthroughs conducted weekly	Teacher lesson plans Teacher evaluations Walkthrough data Classroom observation notes

		Ongoing review (at least quarterly) of student performance data	Student data reporting and data analysis
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**Process for Implementing Action Step**

**Seek rigorous training:** Somerset Academy, Inc. will support the SAWV Leadership team in conducting teacher and program evaluations to provide feedback ***that develops the quality of teaching and standards integration*** in the following areas:

**Develop a Classroom Walkthrough protocol:** SAWV believes that effective feedback to teachers leads to growth – both professionally and in student achievement. Based on the Evaluation Cycle, SAWV leadership will provide teachers feedback. Using the approved research based evaluation system, administrators will conduct classroom observation to gather evidence for the different domains (Classroom Environment and Instruction). During the post-evaluation conference, feedback will be provided to determine effectiveness and areas of improvement based on evidence from the observation. In order to do this, SAWV will follow these essential practices:

**Provide feedback to teachers:**

- ✓ **Promote a Culture of Feedback:** Using the aforementioned Evaluation Cycle, feedback is a natural step in the process of observing and evaluating teachers. The focus and purpose is places on teacher growth paired with student outcomes. To promote a culture of feedback, it is essential to provide professional development to teachers in order to ensure understanding of the expectations of teacher quality. SAWV will create multiple opportunities throughout the year for teachers to engage in feedback conversations. In addition, multiple data sources, such as evaluation data, assessment data, and student work samples, will be used to guide the meaningful feedback conversations and professional learning.
- ✓ **Develop of Team of Leaders:** The success in providing professional feedback to teachers depends on the skills and talents of the leaders implementing it. The SAWV leadership team will be highly skilled in assessing teacher performance and giving clear and actionable feedback to teachers. In addition, systems will be put into place to ensure interrater reliability to ensure that there is a common sense of agreement among raters when observing classrooms.
- ✓ **Develop Tools and Resources for Leaders:** SAWV will develop a classroom walkthrough protocol of agreed upon expectations and resources to use during pre- and post-observation conferences and help identify resources to act on feedback.
- ✓ **Offer Opportunities for Professional Growth for Teachers:** The optimal evaluation process is a cycle of inquiry during which the teacher and SAWV leaders work collaboratively to reflect on the teacher's practice, examine evidence found in student work, and make changes for improved learning. In order to do this, teachers need to know their instructional growth and be provided opportunities for that growth. In collaboration with SAWV leadership, teachers will create goals and action steps based on student outcomes and professional growth. Leadership will assist in creating those opportunities for professional growth whether it is through observing colleagues, engaging in reflective practices, or attendance at local and national conferences.
- ✓ **Use Technology to Provide Timely Data:** SAWV leadership will utilize technology to provide timely feedback to teachers to allow access to relevant feedback while memory of the lesson is still fresh. In addition, videotaped lessons and observations will be used as a practice to aid in teacher reflection.

**Using teacher evaluation data to provide feedback to individual teachers:** SAWV believes that improving teacher quality we will improve student learning outcomes. Continuous growth and improvement is necessary for everyone. Conducting meaningful evaluations is often the first step, which involves a number of observations to see the entire picture of what a teacher is doing in their classroom. The information from these evaluations must lead to constructive feedback and suggestions to help teachers improve as well as acknowledgment/praise of the areas where they are strong. This data also leads to meaningful professional development that is specific to that individual teacher's needs. Furthermore, evaluations can uncover if a teacher is lacking resources. School leaders must be able to give their

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teachers resources they need to effectively deliver quality instruction. Teacher evaluation data also serves as a basis for teacher grouping for Professional Learning Communities as well as mentorship. A strong veteran teacher can provide tremendous insight and encouragement to an inexperienced or struggling teacher by allowing teacher to teacher observations, sharing of best practices and building a trusting relationship.

### **AREA IV: Professional Development**

*Complete the plan for each of the four sections. Provide **sufficiently detailed and implementable action steps** that address each of the following elements of a comprehensive professional development system:*

*each of the following elements of a comprehensive professional development system:*

- i. Developing the professional development plan;*
- ii. Supporting high quality implementation;*
- iii. Monitoring implementation and follow-up; and*
- iv. Adapted to meet the needs of subgroups.*

*For each Action Step you add, ensure all fields have been completed.*

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b><i>i. Developing the professional development plan</i></b>			
Develop professional development expectations and opportunities for SAWV leadership and instructional personnel	SAVV Governing Board (volunteer governing board)  Grand Canyon University (Professional Development and educational support community partner)  Principal  Somerset, Inc. affiliation (non-profit organization providing Professional Development and Education Support services)  Program Partners/Curriculum Publishers	Professional Development Plan to be approved annually  Ongoing data to guide changes in Professional Development plan/calendar (quarterly)	SAVV Professional Development Calendar/Plan  Grand Canyon University Memo of Understanding/Agenda and Handouts  Professional Development Agendas/Handouts  AzMerit student performance data disaggregated by performance level descriptors  School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis  Participant Post-Surveys

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<p>Identify person or position responsible for overseeing professional development activities</p>	<p>Principal</p>	<p>Professional Development Plan to be approved annually</p> <p>Ongoing data to guide changes in Professional Development plan/calendar (quarterly)</p>	<p>SAWV Professional Development Calendar/Plan</p>
<p>Develop professional development expectations for participants</p>	<p>Principal</p>	<p>Professional Development Plan to be approved annually</p> <p>Ongoing data to guide changes in Professional Development plan/calendar (quarterly)</p>	<p>SAWV Professional Development Calendar/Plan</p> <p>Grand Canyon University Memo of Understanding/Agenda and Handouts</p> <p>Professional Development Agendas/Handouts</p> <p>AzMerit student performance data disaggregated by performance level descriptors</p> <p>School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis</p> <p>Participant Post-Surveys</p>

### **Process for Implementing Action Step**

**Develop professional development expectations and opportunities:** Research shows that effective leaders and teachers increase student success and that the primary contributor to making educators effective is high-quality, continuous professional learning. The school's professional development expectations and opportunities are intended for all instructional personnel, including administrators, in order to maintain effective teachers that utilize the most effective instructional strategies to yield student achievement and to assist educators in receiving the requisite number of in-service points needed for recertification. These may include but are not limited to: state mandated coursework in exceptional student education; specific endorsements such as reading, gifted or ESOL.

SAWV understands that, just like students, teachers need professional development that is differentiated to meet their individual needs. During the initial phase of opening, it will be imperative for all staff to understand the 'Somerset Way'; therefore, many topics will be designed for everyone. After school opening, topics for professional development will be based on data – data from benchmarks assessments, data from classroom walkthroughs, and data from immediate teacher needs. Topics to be covered include, but are not limited to, the following:

**School-wide Data Chats:** School-level data chats will occur at the beginning of the school year, at the release of district interim assessments, at the release of state progress monitoring assessments, and at the release of any school-wide

## Academic Systems Plan Template

internal assessments. These data chats will consist of a review and analysis of current student progress, discussion of appropriate interventions which need to be applied, and a mutually agreed upon action plan that would be followed.

**Literacy Plan and School Initiatives:** School literacy plan, best practices, instructional strategies and other ventures such as Somerset's STEAM initiative roll-out and follow-through

**Student Support:** ESE, ESOL, RtI, guidance, crisis intervention and tolerance processes will be outlined; changes and/or updates provided as needed

**Student Information System:** Teachers will participate in training on utilizing the SIS to track attendance and student progress in addition to using its functionality to increase parent communication.

**Data-Driven Decision-Making:** Administrators and staff collaborate to analyze, extrapolate and disaggregate school data from a variety of sources and to use this data to create effective school improvement plans and increase student achievement.

**Curriculum Implementation by Subject/Specialty:** Teachers will participate in individual department trainings related to curriculum implementation, Arizona Standards and their implementation, with special emphasis on incorporating digital resources.

**Technology:** Research-based supplemental digital resources are explored and integrated into instruction

Faculty Meetings: 1<sup>st</sup> Friday of the Month

Curriculum Council Meetings: Second Tuesday of the month after school

Department Meeting: 3<sup>rd</sup> Friday of the month

Grade Level Meeting: 4<sup>th</sup> Friday of the month

SAC Meeting: 2<sup>nd</sup> Friday of every month

SAVV is committed to providing training in STEAM and Blended Learning Education Methods, curriculum, content mastery, standards, classroom management, and leadership development. SAWV will support the professional development needs of all professional staff by subsidizing college classes through its community partnership with Grand Canyon University, facilitating the attainment of continuing education credits, and offering on-site trainings. Staff members will participate in school- initiated and other relevant and necessary workshops for professional development. A member of the administrative team will oversee, coordinate, assist and monitor the staff development process. Teachers will attend relevant local and national conferences and serve as trainer to the remainder of the staff upon return to SAWV. The professional development offered to teachers will align with student achievement data, curriculum, instructional personnel needs, School Improvement Plans, and annual school reports.

In the planning year, the administrative team and members of the Governing Board will visit its affiliate school in Florida to learn about the Somerset Instructional Model and School Culture. Additionally, the administrative team will attend various national STEAM, technology, Model Schools, student engagement, and other national conferences in order to redeliver content to all SAWV teachers. SAWV desires to create and disseminate its own customized Somerset Arizona curriculum to be utilized by all staff. The SAWV administrative team will develop curriculum throughout the planning year.

**Identify person or position responsible:** The principal of the School will appoint a PD Liaison to lead the Professional Learning Support Team (PLST), which will consist of: the PD Liaison, an AP (or principal), and team leaders or department heads, all who share the responsibilities for researching, developing and providing professional learning opportunities for the teachers at the School.

**Develop professional development expectations:** Prior to the opening of SAWV, professional development will be offered. At that time the administrator and identified school leaders (department chairs) will receive professional development in SAWV's Mission, Vision, and in fundamental components of Somerset Learning Education. This training will be led by Somerset Academy Arizona instructional leaders. In the train the trainer model, the Arizona instructional leaders will be able to prove training and support to the teaching faculty at the school. All SAWV faculty will receive one to two weeks (at minimum) of on-site professional development prior to the inaugural school year. Each school year, SAWV's Principal will assess the faculty's professional development needs by surveying faculty and reviewing data for trends that could be addressed through appropriate professional development. This survey will be used to prioritize on-going professional development.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b><i>ii. Supporting high quality implementation</i></b>			
Develop core components of professional development components will support effective implementation of the educational program	Somerset Academy, Inc. affiliation (non-profit organization providing Professional Development and Education Support services)  Grand Canyon University (Professional Development and Educational Support community partnership)  Principal  Program Partners/Curriculum Publishers	Ongoing data to guide changes in Professional Development plan/calendar (quarterly)	SAWV Professional Development Calendar/Plan  Grand Canyon University Memo of Understanding/Agenda and Handouts  Professional Development Agendas/Handouts  AzMerit student performance data disaggregated by performance level descriptors  School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis  Participant Post-Surveys
Develop evaluation system to support high quality implementation	Principal  SAWV Governing Board (volunteer governing board)  Somerset Academy, Inc. affiliation (non-profit organization providing Professional Development	Ongoing data to guide changes in Professional Development plan/calendar (quarterly)	SAWV Professional Development Calendar/Plan  Grand Canyon University Memo of Understanding/Agenda and Handouts

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<p>and Education Support services)</p>	<p>Professional Development Agendas/Handouts</p>
<p>AzMerit student performance data disaggregated by performance level descriptors</p>	<p>School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis</p>
<p>Participant Post-Surveys</p>	

### **Process for Implementing Action Step**

**Develop core components of professional development:** SAWV understands the importance of high quality professional development (PD) for its teachers and leaders, both in the start-up/planning phase and in future years. As such, the school has specific personnel policies to support its goals and to ensure fairness and compliance with state and federal law. SAWV's principal will be responsible for staffing selections and will use multiple means by which to identify qualified staff including attending recruitment fairs, teacher-teacher, etc.

SAWV supports the development of high quality teachers with strategic recruitment, frequent feedback through observations and evaluations, and supportive mentoring. SAWV is committed to the implementation of instructional strategies and methods focused on the key areas of STEAM, Blended Learning, collaboration, communication, creativity and critical thinking. To achieve this goal, the school must place an emphasis on developing effective teachers. This will be accomplished through the allocation of time, space and the necessary materials for implementation. Students are released early each Friday in order for the teaching staff to devote time for school-wide professional development. In addition, full-day professional development has been built into the calendar based on benchmark assessment periods. This will allow teachers time to disaggregate assessment data and adjust academic groupings accordingly. Space in the building will be designated in a way to allow for professional development to be held in locations with access to technology and the appropriate materials to ensure its success.

The core components of the professional development plan include creating and meeting goals for each of the following areas: Core academic areas: Including, but not limited to: Standards alignment, Assessment/data chats, Planning, Best instructional practices, Technology integration, Financial literacy, Safety, Technology, Exceptional Student Education, ESOL/ELL, Observation tool, School discipline plan, and Guidance and student support procedures

These areas are outlined for new administrators by the Somerset District leadership, and are to be addressed at the beginning of each school year with ample opportunities for follow-up throughout the year. The administration or selected person will support the faculty and staff by leading and directing professional learning on-site, while documenting all on-site activities.

In addition to the professional development plan for the Somerset District and the School's projected plan, teachers and staff will also have the opportunity to take advantage of additional courses and resources offered by the Sponsor in order to provide teachers with the most appropriate courses for their needs, and in order to assist educators in receiving the requisite number of in-service points needed for recertification. These may include but are not limited to: state mandated coursework in exceptional student education; specific endorsements such as reading, and gifted or ESOL.

The professional learning opportunities provided at the School site are meant to be those which are beneficial to the entire faculty and staff, and are thus chosen as such by the PLST. Professional staff may also be able to procure additional learning opportunities through the subsidizing of college classes and facilitating the attainment of continuing education credits, in addition to those afforded by the Sponsor.

### **In-Service Professional Development Calendar:**

**K-5 Early Release:** Small Group Instruction/Centers to Maximize Learning, Innovative Projects-Based Learning, Cross-Curricular Writing Strategies, Differentiated Instruction to Increase Student Achievement, Project-Based Learning

**Additional Professional Development:**

Pre-Service Week Topics

School-Wide Data Analysis

Instructional Goal Setting

Serving Special Population

All staff will participate in school-initiated and other relevant and necessary workshops for professional development, and a member of the administrative team will assist and monitor the staff development process.

Professional development for administrators includes both internal and district-based in-service trainings. At a minimum, Somerset administrators are expected to participate in the following professional development trainings and conferences:

Teacher Evaluation Training for Administrators – Training provided by the sponsor to conduct formal observation of teachers

Classroom Walk-through Training – Provides school leaders with strategies and tools to effectively structure classroom visits and follow-up reflection. Reflective thinking about one's practice provides an effective strategy for change and improvement by fostering a process of communication between the instructional leaders and the teacher to increase the focus on student achievement. The process provides a powerful strategy for increasing student achievement; a strategy for classroom visits that focuses on teaching and learning; methodology for analyzing the classroom for feedback purposes, and the use of reflective conversation for providing feedback.

Budget Training for Administrators – This training addresses school budgeting as it pertains to both the school's operating budget and internal accounting policies and procedures, *Financial and Program Cost Accounting and Reporting for Arizona Schools* (Redbook) requirements, and checks and balances to ensure a sound budget.

Master Scheduling for Administrators – Administrators are trained on creating an efficient and effective master schedule that meets the national, state and district course requirements, is financially sound, and that meets class size requirements.

Developing the School Improvement Goals – This training assists school administrators to develop sound and effective school-wide goals. This process includes data analysis, goal-setting, budget planning, professional development planning and reflective practices.

Principal Chat Sessions – Charter School Administrators meet by level (secondary, elementary) to go over pertinent topics and to share best practices. These sessions include curriculum development, standards implementation, scheduling, educational changes, innovative programs, and more. Experienced administrators share their best practices for using student achievement data with newly appointed assistant principals.

Annual State Charter School Conference – administrators will attend state conference on an annual basis.

Administrators may also participate in professional development conducted through: The National Association of Secondary School principals; the Southern Association of Colleges and Schools/AdvancEd; Association for Supervision and Curriculum Development; and state trainings.

**Develop evaluation system:** The core components of the professional development plan include creating and meeting goals for each of the following areas: Core academic areas: Including, but not limited to: Standards alignment, Assessment/data chats, Planning, Best instructional practices, Technology integration, Financial literacy, Safety, Technology, Exceptional Student Education, ESOL/ELL, Observation tool, School discipline plan, and Guidance and student support procedures

These areas are outlined for new administrators by the Somerset District leadership, and are to be addressed at the beginning of each school year with ample opportunities for follow-up throughout the year. The administration or selected person will support the faculty and staff by leading and directing professional learning on-site, while documenting all on-site activities.

**Outcome/Evaluation**

- Teacher Collaboration meeting notes and professional development activity agendas will document team activities.
- Sign-in sheets will document staff attendance at professional development activities.
- Staff surveys will be used to evaluate professional development activities and follow-up support.

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- Teacher lesson plans and administrator observations will assess effectiveness of program implementation.

Student achievement data (program assessments, adaptive interim assessments and annual state testing) will be used to evaluate the effectiveness of professional development on student learning.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b><i>iii. Monitoring implementation and follow-up</i></b>			
Develop professional development timeline and provide oversight to implementation and follow-up	Principal Somerset, Inc. affiliation (non-profit organization providing Professional Development and Education Support services)  Grand Canyon University (Professional Development and Educational Support community partnership)  Program Partners/Curriculum Publishers	Professional Development Plan to be approved annually  Ongoing data to guide changes in Professional Development plan/calendar (quarterly)  Walkthroughs to be completed bi-weekly	SAWV Professional Development Calendar/Plan  Grand Canyon University Memo of Understanding/Agenda and Handouts  Professional Development Agendas/Handouts  AzMerit student performance data disaggregated by performance level descriptors  School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis  Participant Post-Surveys  Classroom Walk Through Data  Teacher evaluations

### Process for Implementing Action Step

**Monitoring implementation:** SAWV understands the importance of follow through and the adage of 'inspect what you expect'. A typical practice in place at each of the Somerset campuses is to continuously monitor for implementation. Oftentimes, that oversight might include creating specific focuses for future classroom walkthroughs that target the embeddedness of the new practices into classroom instruction. This data will be collected as overall trends and then included in future discussions with teachers to provide additional guidance. An effective practice is to include a consistent agenda item during staff meetings for 'Professional Development Follow Up'. Teacher can share successes and challenges with colleagues that they have found with the implementation and increase collaboration among the teaching staff.

**Develop professional development timeline:** Prior to school opening, there are two phases of teacher preparation, one addressing the unique needs to new teachers, and the other addressing returning teachers.

- **New Teacher Induction Program:** opportunity to participate in the Somerset Academy New Teacher Academy, which provides new educators with tools for entering the field such as:
  - Classroom management techniques, strategies for effective communication with parents and how to access student data and gradebooks.
  - These teachers will also be provided with a Somerset orientation to help acclimate them to the policies and procedures of their specific campus. These teachers meet one week prior to returning faculty.
- **Annual Somerset Conference:** New and returning teachers are united with educators from across the Somerset network held prior to opening of schools, which provides topical presentations relevant to educators throughout the network.
- **Pre-Service Week:** The week prior to opening of schools, in accordance with the district calendar, the School will have a gamut of professional learning opportunities for the faculty and staff to prepare for the upcoming school year, which will include, but not limited to the following topics/presentations:
  - Data-Driven Decision-Making – Administrators and staff collaborate to analyze, extrapolate and disaggregate school data from a variety of sources and to use this data to create effective school improvement plans and increase student achievement.
  - Student Support – The faculty and staff related to student support provide guidance and procedures on the following topics:
    - Exceptional Student Education – Teachers are guided through the IEPs of their students and are made aware of the accommodations required to address the needs of each learner.
    - ESOL – Teachers are provided with guidance and resources to help address the unique academic and social needs of English Language Learners.
    - RtI/MTSSS Framework – Staff learn to initiate and address the RtI model to meet the academic and behavioral needs of all students.
  - Curriculum Implementation by Subject/Specialty – Teachers will participate in individual department trainings related to curriculum implementation, Arizona Standards and their implementation, with special emphasis on incorporating digital resources.
  - Other:
    - School Literacy Plan – Teachers will be exposed to the School's literacy plan with specific strategies on how to differentiate and individualize instruction.
    - Promethean Board and other Technology Trainings: Beginner/Intermediate. Teachers are exposed to the resources and instructional implications of utilizing interactive whiteboards and other technology that will be used school wide as well as technology within the classrooms.
    - Safety and Security – Training will instruct staff on daily safety procedures, and how to prevent and protect the school and students, to handle emergency situations, and to recognize potential threats in accordance with the school safety plan.
    - School Discipline Plan – Classroom-based discipline plans are discussed and approved; school-wide discipline procedures are outlined and clarified.

The School-wide professional development plan will be ongoing, sustained, inquiry-based learning that occurs at least weekly throughout the school year. This type of professional learning provides focused, deep learning that builds upon prior learning resulting in positive changes in practice and increased student learning. A needs assessment can be conducted on a whole school level, or by grade, subject, team, PLC or individual levels. It should be reviewed regularly and updated to reflect staff learning and changes in student data.

SAWV will combine the services of professional trainers with the knowledge and experience of expert teachers in similar schools to develop and provide professional development activities for the whole staff and to develop strong teams of teacher leaders within SAWV to collaboratively design and deliver ongoing support.

#### **Outcome/Evaluation**

- Teacher Collaboration meeting notes and professional development activity agendas will document team activities.
- Sign-in sheets will document staff attendance at professional development activities.
- Staff surveys will be used to evaluate professional development activities and follow-up support.
- Teacher lesson plans and administrator observations will assess effectiveness of program implementation.

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Student achievement data (program assessments, adaptive interim assessments and annual state testing) will be used to evaluate the effectiveness of professional development on student learning.

Action Step	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
<b><i>iv. Adapted to meet the needs of subgroups</i></b>			
Develop professional development support in meeting the unique needs of subgroups	Principal  Somerset, Inc. affiliation (non-profit organization providing Professional Development and Education Support services)  Grand Canyon University (Professional Development and Educational Support community partnership)	Professional Development Plan to be approved annually  Ongoing data to guide changes in Professional Development plan/calendar (quarterly)  Walkthroughs to be completed bi-weekly	SAWV Professional Development Calendar/Plan  Grand Canyon University Memo of Understanding/Agenda and Handouts  Professional Development Agendas/Handouts  AzMerit student performance data disaggregated by performance level descriptors  School's chosen standardized assessment(s)/universal screener(s)/progress monitoring data analysis  Participant Post-Surveys  Classroom Walk Through Data  Teacher evaluations

### Process for Implementing Action Step

**Meeting the needs of diverse STUDENTS:** Somerset schools contract a data specialist, who is available to meet with school leadership and/or faculty to review data and identify trends for a particular teacher or within the school. Data serves as a feedback system to guide teachers in lesson planning and individualizing instruction as well as to provide students with knowledge of their current levels of performance. Somerset prides itself on the use of differentiated instruction to meet the individual needs of students. The School will use data on an ongoing basis to inform instructional practices allowing for increased student learning outcomes as well as to inform students of their progress including strengths and opportunities for improvement. These actions will enhance instructional interventions and enrichment programs.

All students, who exhibit significant risk, will be given intensive intervention as soon as that risk is identified and provided support. Students will continue to be given intensive intervention until the deficiency is remediated. The deficiencies will be identified and monitored using data.

- **At the Sub-group, or individual student level:** The student's teachers and administrative team would review data (individual assessments/IEP or ELL Plans) and determine where instruction or interventions needs to be modified. Changes in intervention plan and/or varied strategies to target individual students' needs would be identified and communicated to the parents and documented by the teacher and in the student's ELL or IEP plan if applicable.
- **At the Classroom Level:** The administration would determine (based on classroom/teacher data reports, observations and classroom walk-throughs) which teachers need additional support and provide professional development and or mentoring support accordingly. A plan for the teacher/class would be implemented and documented through the teacher's lesson plans. Teachers would be expected to implement corrective action/change in intervention or content in the classroom with support from the administration.
- **At the school-wide level:** The Instructional Leadership team will review school-wide data to determine school-wide areas in need of improvement. Faculty and Staff will work collaboratively through PLCs (by content area and grade level) to create the action plan including identifying strategies that were successful and strategies/curriculum/ and intervention processes that ought to be revised.

Professional development targeting these diverse students will focus on remediation and enrichment instructional practices. Intervention programs which are research based will be the basis of PD focusing on remediation in addition to analysis of data. Enrichment programs such as project based learning and extension activities will help meet the needs of students who are excelling in the curriculum.

To meet the needs of a diverse student population, professional development will be provided based on cultural competencies. This type of professional development will train teachers to successfully teach students who come from different cultures than their own. Culturally diverse teaching practices incorporate students' rich cultural heritage into learning experiences. According to research at Brown University, culturally responsive teaching includes:

- Communicating high expectations
- Learning within the context of culture
- Culturally-responsive curriculum
- Teachers as facilitators
- Student-centered instruction
- Positive perspectives on parents and families
- 

The resource book *Educating Everybody's Children: Diverse Teaching Strategies For Diverse Learners* by Robert W. Cole is incorporated into all curriculum subject areas. Subject-specific strategies for math, science, reading, writing, and social studies are incorporated from this resource.

**Meeting the needs of diverse TEACHERS:** Annually, teachers report to school at least a week in advance of their students. During this week, workshops are held daily and organized to target and tap the diversified needs of teachers, such as beginning teachers, teachers new to Somerset, the entire faculty, department or content specific workshops, etc. each with a set of criteria to be addressed and wherein disaggregating data training occurs, in a different way, at each of those meetings. This approach sets the tone for all faculty and staff, that the school is not only data-rich, but data-driven.

Additionally, monthly in-house workshops will be held by administrators to address student achievement data by content area, and anecdotal information from in the core curriculum areas. Depending on the need, the School may elect to contract for delivery of a targeted PD to share best practices in areas that need to be remedied. Additionally, at least monthly, and as often as biweekly, team leaders will facilitate support and encourage communication during Department Meetings- which will work as Professional Learning Communities wherein team planning and troubleshooting will occur. Select teachers will attend local, state and national conferences and serve as trainer to the remainder of the staff, as applicable, upon return to the School.

The School Instructional Leadership team -which could consist of the principal, assistant principal, grade level chairs, ESE and ESOL Specialist, Reading/Curriculum Coach will oversee the data management process and provide support for teachers to make data including technology and resources to make data readily available. All teachers will receive specific training on data-driven decision-making process and procedures as well as Professional Development on how to interpret and use data to improve student learning.

**A.6**

# **Instructional Analysis**

## Instructional Analysis Templates

### Instructional Analysis Templates for K-2 Grade Span

#### Instructional Analysis for Kindergarten Math

*Provide a complete response for each component below (1 through 7) based on the listed Required Standard. Ensure that responses meet the listed criteria in the left-hand column and align with the new charter application package.*

<b>Required Standard: K.CC.C.6</b>  <b>1. Learning Targets</b> Identify the objectives students must know that align with the Required Standard and can be assessed to demonstrate mastery of the Required Standard.	Identify whether the number of objects in one group is greater than, less than, or equal to the number of objects in another group. (Include groups with up to ten objects)																		
<b>1. Learning Targets</b> Identify the objectives students must know that align with the Required Standard and can be assessed to demonstrate mastery of the Required Standard.	<p>According to Arizona standards, students must know two major clusters in Counting and Cardinality (CC): <i>know number names and the count sequence</i> (K.CC.A.1, K.CC.A.2, AND K.CC.A.3) and <i>count to tell the number of objects</i> (K.CC.B.4 AND K.CC.B.5).</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="3" style="background-color: #cccccc; text-align: center; padding: 2px;">Counting and Cardinality (CC)</th></tr> </thead> <tbody> <tr> <td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.A Know number names and the count sequence.</b> </td><td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.A.1</b> </td><td style="width: 70%; vertical-align: top; padding: 2px;"> Count to 100 by ones and by tens. </td></tr> <tr> <td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.A Know number names and the count sequence.</b> </td><td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.A.2</b> </td><td style="width: 70%; vertical-align: top; padding: 2px;"> Count forward from a given number other than one, within the known sequence (e.g., "Starting at the number 5, count up to 11."). </td></tr> <tr> <td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.A Know number names and the count sequence.</b> </td><td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.A.3</b> </td><td style="width: 70%; vertical-align: top; padding: 2px;"> Write numbers from 0 to 20. Represent a number of objects with a written numeral 0 to 20 (with 0 representing a count of no objects). </td></tr> <tr> <td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.B Count to tell the number of objects.</b> </td><td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.B.4</b> </td><td style="width: 70%; vertical-align: top; padding: 2px;"> Understand the relationship between numbers and quantities; connect counting to cardinality. <ul style="list-style-type: none"> <li>a. When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object (one to one correspondence).</li> <li>b. Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted (cardinality).</li> <li>c. Understand that each successive number name refers to a quantity that is one larger (hierarchical inclusion).</li> </ul> </td></tr> <tr> <td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.B Count to tell the number of objects.</b> </td><td style="width: 15%; vertical-align: top; padding: 2px;"> <b>K.CC.B.5</b> </td><td style="width: 70%; vertical-align: top; padding: 2px;"> Count to answer questions about "How many?" when 20 or fewer objects are arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1 to 20, count out that many objects. </td></tr> </tbody> </table> <p><b>Vocabulary Words:</b></p> <p>Number  How many?  Greater  Less  Equal  Compare</p>	Counting and Cardinality (CC)			<b>K.CC.A Know number names and the count sequence.</b>	<b>K.CC.A.1</b>	Count to 100 by ones and by tens.	<b>K.CC.A Know number names and the count sequence.</b>	<b>K.CC.A.2</b>	Count forward from a given number other than one, within the known sequence (e.g., "Starting at the number 5, count up to 11.").	<b>K.CC.A Know number names and the count sequence.</b>	<b>K.CC.A.3</b>	Write numbers from 0 to 20. Represent a number of objects with a written numeral 0 to 20 (with 0 representing a count of no objects).	<b>K.CC.B Count to tell the number of objects.</b>	<b>K.CC.B.4</b>	Understand the relationship between numbers and quantities; connect counting to cardinality. <ul style="list-style-type: none"> <li>a. When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object (one to one correspondence).</li> <li>b. Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted (cardinality).</li> <li>c. Understand that each successive number name refers to a quantity that is one larger (hierarchical inclusion).</li> </ul>	<b>K.CC.B Count to tell the number of objects.</b>	<b>K.CC.B.5</b>	Count to answer questions about "How many?" when 20 or fewer objects are arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1 to 20, count out that many objects.
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## Instructional Analysis Templates

<p><b>2. Prior Knowledge</b></p> <p>List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.</p>	<p>Students need to know how to...</p> <ul style="list-style-type: none"> <li>• Write numbers from 0 to 20. Represent a number of objects with a written numeral 0-20 (with 0 representing a count of no objects).</li> <li>• Understand the relationship between numbers and quantities; connect counting to cardinality.</li> <li>• Count to answer "how many?" questions about as many as 20 things arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1-20, count out that many objects.</li> </ul> <p>The teacher will begin by discussing how we can compare groups of things by counting. The teacher will also remind the students that when counting, the last number said is the number that represents the number of objects.</p>
<p><b>3. Instructional Plan</b></p> <p>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.</p>	<p>Differentiated Instruction through Math Centers: The number of students in each group may vary based on the understanding of the concept and the needed prior knowledge. If a student is struggling with the daily concept the teacher may provide scaffolding and support through:</p> <ul style="list-style-type: none"> <li>• Reteach – worksheets or use of manipulatives for better understanding</li> <li>• Enrichment- teacher provides worksheet or project that "level up" concept</li> <li>• Research-Based Computerized Program (such as i-Ready) – teacher can assign a lesson allowing for students to practice a concept</li> </ul> <p>SOMAZ mathematics instructional strategies include:      Mathematics print rich environment: math word walls and bulletin boards will reflect already taught lessons and current mathematics topics.</p> <p>Active Participation: Active participation is key in mathematics. There are various strategies that support active participation in the classroom. At the elementary level this may look like big 8x10 digit cards that students hold up as a problem is given. Kahoot!, a game-based learning platform, is also used to make learning fun while students answer questions through electronic devices that then computes onto the classroom Smart Board.</p> <p>Think-Pair-Share: This strategy gets students to think critically and use each other as resources before going to the teacher. Students will think independently about the answer to a question they were prompted with. After, students share their response with a partner. They have an opportunity to discuss whether their answers agreed or if one or both need to go back to the drawing board. Next, they share responses with the entire class.</p> <p>Think-alouds: using explicit explanations of the steps of problem solving through teacher modeling metacognitive thought. Often students see a problem and hear the answer but don't know what happened in between. When a teacher works through what is going on in his/her brain as a problem is solved, students can begin to fill in the gaps. Students are also required to 'think aloud' when explaining their answers for the teachers and students to understand where the mistake took place or to verify that he or she is using the right process to come to the answer.</p>

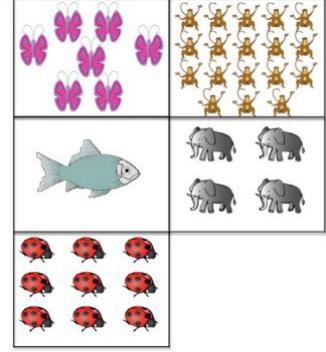
## Instructional Analysis Templates

	<p>Graphic organizers: visual displays to organize information into things like trees, flowcharts, webs, etc. These help students to consolidate information into meaningful whole and they are used to improve comprehension of stories, organization of writing, and understanding of difficult concepts in word problems.</p> <p>Student-generated word problems: students create word problems for a specific math skill. Through the construction of a problem, students learn what to look for when solving word problems, they are assigned. It also makes mathematics relevant to the students' own lives.</p> <p>Specifically, for Standard K.CC.C.6, the TW review with students the learning targets for the lesson. The TW review with students the meaning of the important vocabulary words to understand, specifically greater, less, and equal. The TW review with students the strategies they have used to count objects and also how numbers correlate to counting. The TW have students share different number of things in the class. SW record their number on a whiteboard and display it for the teacher to assess understanding. The TW ask students to share strategies they use for counting.</p> <p>The TW follow the procedures in the research-based textbook (such as Go Math). There are 5 components of the lesson: Engage, Explore, Explain, Elaborate, and Evaluate.</p>
<p><b>4. Instruction</b>  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.</p>	<p><b>Engage:</b> The TW use the Interactive Student Edition in text book and complete the Learning Activity outlined in the lesson plan. The TW Direct children to think about how to use counting objects to compare quantities. Review what children know about how to count objects.</p> <p><b>Explore:</b> Read the following problem aloud to the class.  <i>Count the red fishes in the tank and then count the blue fishes in the tank.</i>  <i>Compare the red fishes to the blue fishes.</i>  Work through the Problem Solving graphic organizer together.</p> <ul style="list-style-type: none"> <li>• What do you need to find? <i>how many red fish and how many blue fish there are. Then determine is it greater, less, or equal to.</i></li> <li>• What numbers do you need? <i>The quantity for the red and the quantity for the blue.</i></li> <li>• What picture can you draw to show the comparison? <i>I can draw 8 fish in blue and 8 fish in red in a line and match them to show that they are the same.</i></li> </ul> <p>Have children say the solution as a complete sentence: There are 8 red fish and 8 blue fish in the tank. This is an equal amount of red and blue fish.</p> <p>To focus on the solution process, ask volunteers to use their whiteboards to demonstrate how they solved the problem.</p> <p><b>Explain:</b> Use questions to guide children through different exercises of the student workbook. Ask them what they need to find (how many), what information they need to use (looking at two sets of objects and counting), and what strategy they can choose to get started. Make materials available so children can model the problems before drawing.</p> <ul style="list-style-type: none"> <li>• What do you need to find? <i>Greater than, less than, or equal to</i></li> <li>• What information do you need to use? <i>9 green toy cars or 1 yellow toy car</i></li> </ul>

## Instructional Analysis Templates

	<ul style="list-style-type: none"><li>• Which number of objects is greater? What strategy would you use? <b>Possible answer:</b> I would count one side of objects first and then I would count the other. I would then look at each group and see which one has more and compare the numbers. Use Math Talk to help children focus on the process of comparing.</li><li>• What other strategy can you use to solve this problem? <b>Answers will vary.</b> <b>Children might say that they look for the number of objects with less.</b></li></ul> <p><b>Elaborate:</b> The TW begin an activity using different counters in different centers. The students will travel from table to table to compare the numbers and write them down on their work sheet. The TW have children read each problem and think about a strategy they can use to solve it since the strategy they use will impact the picture they draw.</p> <ul style="list-style-type: none"><li>• What did you draw for your picture?</li><li>• How did your picture help you find the answer?</li><li>• How do you know your answer is correct? <b>Possible answer:</b> The picture I drew helps me check my work to be sure my answer is correct.</li></ul> <p>If children answered the questions correctly they may move on to the computer center. The other students will work to ensure they comprehend the lesson.</p>
<p><b>5. Formative Assessment</b> List criteria for determining whether students have met each of the learning targets.</p>	<p><b>Evaluate:</b> Use the checked exercises from the Research Based Textbook for a Quick Check. (aka Formative Assessment) Children should model the comparing of number in objects, drawings, and/or equations by declaring greater than, less than, or equal to.</p> <p>The TW assess the other learning targets by including the following question on an exit ticket: <i>How do you compare different quantities of objects?</i> <b>Possible answer:</b> I count each group and then I decide which group has the most.</p> <p><b>Criteria:</b> Students correctly answer problems 4 and 5 on a student workbook page. Students must also answer the question on the exit ticket with an appropriate answer. (See possible answer above)</p> <p><i>Student-Friendly Knowledge Targets</i></p> <ul style="list-style-type: none"><li>• I know various strategies to compare quantities of objects up to 10.</li><li>• I know different tools and models to solve comparing quantities.</li></ul> <p><i>Student-Friendly Reasoning Targets</i></p> <ul style="list-style-type: none"><li>• I can explain the strategy used to compare</li><li>• I can compare groups of objects up to 10.</li></ul> <p><i>Student-Friendly Product Targets</i></p> <ul style="list-style-type: none"><li>• I can compare two groups of objects.</li></ul> <p><b>Sample Assessment:</b> Students will cut out the different cards and place them two by two next to each other. The student will have mastered the learning target if the student can create different groupings of animals and compare them accurately as dictated by the teacher.</p> <p>Teacher:</p>

## Instructional Analysis Templates

	<p>1. Compare butterflies to fish. How many are in each? Which animal has more?</p> <p>2. Compare elephants to monkeys. How many are in each? Which animal has less?</p> <p>3. Compare lady bugs to butterflies. How many are in each? Which animal has more?</p> <p>4. Compare elephants to fish. How many are in each? Which animal has less?</p> <p>5. Compare monkeys to butterflies. How many are in each? Which animal has more?</p> 
<p><b>6. Summative Assessment</b> Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard.</p>	<p>When students have demonstrated they are ready for a summative assessment on this standard the teacher will have students complete a student workbook page. (Note: The teacher will not give this assessment until completing the remediation activities outlined below for students that do not demonstrate mastery on the formative assessment Quick Check.)</p> <p><b>Criteria for Mastery:</b> Students must correctly answer at least 4 out of 5 questions on a student workbook page. Students must be able to compare quantities of objects using the correct term.</p> <p><b>Product Targets</b></p> <ul style="list-style-type: none"> <li>Students must be able to compare groups of no more than ten using the correct vocabulary words to compare.</li> </ul>
<p><b>7. Remediation</b> Describe the processes available to provide support to students that do not meet the learning targets.</p>	<p>If a child misses the checked exercises in the Quick Check the TW follow up by using one or more of the following resources:</p> <ul style="list-style-type: none"> <li>Reteach</li> <li>Personal Math Trainer</li> <li>RtI Tier 1 Activity (online)</li> </ul> <p>This requires pull out groups of differentiated instruction. The teacher will back track to standards prior to ensure that the student is scaffolded and prepared to move forward. By providing the previous lessons and reviewing previous standards the student should be able to master the new one.</p>

## Instructional Analysis Templates

<b>Instructional Analysis for Grade 1 in Reading</b>						
Provide a complete response for each component below (1 through 7) based on the listed Required Standard. Ensure that each response meets the criteria listed in the left-hand column and aligns with the new charter application package.						
Required Standard: <b>1.RL.2</b>	Retell stories, including key details, and demonstrate understanding of their main idea, central message, or lesson.					
<b>1. Learning Targets</b> Identify the objectives students must know that align with the Required Standard and can be assessed to demonstrate mastery of the Required Standard.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #d3d3d3; padding: 2px;">Reading Standards for Literature</td></tr> <tr> <td style="background-color: #e0e0ff; padding: 2px;">Key Ideas and Details</td></tr> <tr> <td style="padding: 2px;">K.RL.1 With prompting and support, ask and answer questions about key details in a text.</td></tr> <tr> <td style="padding: 2px;">K.RL.2 With prompting and support, retell familiar stories, including key details.</td></tr> <tr> <td style="padding: 2px;">K.RL.3 With prompting and support, identify characters, settings, and major events in a story.</td></tr> </table> <p>These are the previous standards that should have been mastered at their most basic level in Kindergarten.</p>	Reading Standards for Literature	Key Ideas and Details	K.RL.1 With prompting and support, ask and answer questions about key details in a text.	K.RL.2 With prompting and support, retell familiar stories, including key details.	K.RL.3 With prompting and support, identify characters, settings, and major events in a story.
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Key Ideas and Details						
K.RL.1 With prompting and support, ask and answer questions about key details in a text.						
K.RL.2 With prompting and support, retell familiar stories, including key details.						
K.RL.3 With prompting and support, identify characters, settings, and major events in a story.						
<p><b>Access Points</b></p> <ol style="list-style-type: none"> <li>1. Answer questions about key details in a story (e.g., who, what, when, where, why).</li> <li>2. Ask questions about key details in a familiar story.</li> <li>3. Retell a favorite text, including key details.</li> <li>4. Use details to tell what happened in a story.</li> <li>5. Retell the sequence of events in a story.</li> <li>6. Retell stories and demonstrate understanding of their central message or lesson.</li> <li>7. Identify events in a familiar story.</li> <li>8. Use signal words (e.g., first, next, after, before) and key text details to describe the events of a story.</li> <li>9. Identify and/or describe the characters from a story.</li> <li>10. Identify and/or describe a major event from a story.</li> <li>11. Answer questions regarding key events of stories.</li> <li>12. Identify and/or describe a setting in a story.</li> <li>13. Describe feelings of characters.</li> </ol> <p><b>Learning Targets</b></p> <ul style="list-style-type: none"> <li>• Students must know that retell means to tell the story again in their own words.</li> <li>• Students must know that key details are the important parts of a story.</li> <li>• Students must know that you can retell a story using the setting, characters, problem, events, solution and the central message.</li> </ul>						

## Instructional Analysis Templates

	<ul style="list-style-type: none"> <li>Students must know that the central message is the lesson the author is trying to teach.</li> </ul> <p><i>Essential Vocabulary</i></p> <ul style="list-style-type: none"> <li>retell</li> <li>key details</li> <li>setting</li> <li>characters</li> <li>central message</li> <li>problem</li> <li>solution</li> <li>main idea</li> </ul>
<p><b>2. Prior Knowledge</b></p> <p>List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.</p>	<p>Throughout the year, students are taught knowledge/skills that help them meet the learning targets of the Required Standard. This built-in scaffolding within the Grade 1 scope and sequence helps students gain the knowledge needed to master the Required Standard. These skills include, but are not limited to, the following:</p> <ul style="list-style-type: none"> <li>Identify Characters</li> <li>Identify Setting</li> <li>Identify the Problem</li> <li>Summarizing</li> </ul> <p>Learning how to apply these skills within one text builds students' knowledge and skills and allows them to be successful when retelling other stories.</p> <p><i>Prior Knowledge Skills</i></p> <ul style="list-style-type: none"> <li>Students must be able to identify characters, setting, the problem.</li> <li>Students must be able to read.</li> </ul>
<p><b>3. Instructional Plan</b></p> <p>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.</p>	<p>A <i>Research Based textbook</i> outlines instruction and uses the gradual release model—both within a lesson and across a week of instruction. Each week, the teacher is provided with a suggested lesson plan that can be used to guide students through the steps necessary to meet the learning targets. Throughout the instructional path, students work in groups, pairs, and independently.</p> <p>The instructional path of each week begins with an introduction to the concept and essential question. After building background, the students build listening comprehension skills through an Interactive Read Aloud lesson.</p> <p>Students then read a Shared Read text in the Reading/Writing Workshop. The teacher then guides students through several short mini-lessons to teach and model the weekly skills and strategies. With additional guidance, students practice and apply these skills by rereading the Shared Read from the Reading/Writing Workshop using a close reading routine.</p> <p>After practicing these skills and strategies, students read a longer anchor text found in the Literature Anthology. As students read, they are prompted to stop and check their understanding of the text. Additionally, teachers provide more prompts to test students' comprehension of the text by utilizing the skills they learned previously. As needed, teachers have the option to scaffold understanding.</p>

## Instructional Analysis Templates

	<p>Students then reread the anchor texts and answer additional close reading prompts, either orally or in their Close Reading Companion. These reread prompts are meant to promote deeper level, critical thinking through author's craft and author's purpose. After rereading the anchor text, students read and reread a related paired read.</p> <p>In addition to whole group lessons, students are placed into small groups where they further practice and apply the skills of the week through Leveled Reader lessons and skills mini-lessons. The Leveled Readers, which focus on the same skills and strategies as the other texts from the week, consist of a main and paired read. Prompts guide students to retell the story using key details and the main idea or central message.</p> <p>At the end of the week, students are expected to integrate the knowledge they've gained by understanding the connections among all of the texts they have read in the week.</p> <p>SOMAZ will use the following ELA instructional strategies when presenting new information:</p> <ul style="list-style-type: none"><li>✓ <b>"I do, We do, You do"</b> - Overall, all subjects and levels will be structured using the "I do, We do, You do" model. This model allows students to be introduced to a concept while accessing prior-knowledge and then applying both the new information with the prior knowledge; thus, allowing students to have a deeper understanding of the concept introduced. It also gives the teacher the ability to model the concept effectively and address the needs of the higher-level students as well as those students that need extra support before allowing them to attack the problems on their own during the independent time. The wrap up allows the teacher to formally and/or informally assess the comprehension of the students and implement remediation strategies if necessary to ensure students have a thorough understanding. This model is used cross-curricular so the different subjects can be supportive of one another. It is beneficial to the students as each subject is structured with this model so the consistency allows for better use of time and effective comprehension.</li><li>✓ <b><i>Universal Design of Learning:</i></b> used as a guide to instructional design and delivery in all curriculum development. Universal Design of Learning is a framework for flexible, differentiated instructional approaches that includes flexible methods for presentation, expression and active learning, and student engagement, so all students (e.g., students with disabilities, ELLs) can participate fully in core instruction.</li><li>✓ <b><i>Systematic &amp; Explicit Instruction:</i></b> The School will use formative and summative assessment data to realign the instructional framework and provide systematic and explicit instruction for text-based vocabulary acquisition and close reading models using complex text that is grade level appropriate.</li><li>✓ <b><i>Print Rich Environment:</i></b> Each class will maintain a classroom library to include a collection of quality literature that includes material written at varying reading levels and in a variety of genre forms, inclusive of both fiction and nonfiction. This collection will offer students reading material that will support their individual interests and abilities. Frequent successful reading experiences using appropriate texts will</li></ul>
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## Instructional Analysis Templates

	<p>provide the opportunity to improve their reading proficiency with regard to fluency, vocabulary, and comprehension.</p> <p>✓ <u><b>Word Walls:</b></u> Teachers will create effective word walls that consist of high frequency words, word patterns or phonic elements, and interesting, exciting words. Students will use the word wall during lessons and activities to practice recognizing words quickly and accurately.</p>
<p><b>4. Instruction</b></p> <p>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.</p>	<p>Throughout the week, students read and reread a series of texts using a close reading routine, as described in the Instructional Plan above. They apply skills and strategies they've been learning during the week and throughout the year to each text, including identifying the main idea/key details and summarizing the texts. This instructional path allows them to then apply the skills and strategies to be able to retell.</p> <p><b>Procedure</b></p> <p><b>Activate Prior Knowledge</b></p> <p>Students will conduct a classroom discussion on bats. As a class, the students will complete a K-W-L chart to talk about and write about bats. The students will watch a Brain Pop video about bats.</p> <p><b>Develop Comprehension Read Aloud</b></p> <p>As a class, the teacher will read aloud an exemplar text, <u>Stellaluna</u>. As a class we will discuss vocabulary words, characters, the setting, the problem, and the solution. After the text is read, the class will revisit the important key details of the text. The teacher will introduce the five finger retelling strategy.</p>  <p>Students will reread the text and begin stating the different parts that are needed to retell.</p> <p>As a class, the teacher will model retelling using the five finger retelling strategy. The teacher will work with the class to complete a chart detailing all of the important information in <u>Stellaluna</u>.</p> <p>Students will then look at the chart and retell the story to a buddy. They will be working collaboratively to determine the main details of the story and the central message.</p> <p><b>Making Connections</b></p> <p>Students will leave whole group area and break into groups of 3. They will use the five finger retelling strategy chart to write a summary. Students will discuss missing details and then use the text to add missing information to their paragraph. Students will then present it to the class.</p> <p><b>Exit ticket:</b> Groups will identify the five parts to retelling a story.</p>

## Instructional Analysis Templates

	<p>Additionally, SOMAZ will use the following ELA instructional strategies to develop concepts and practice skills:</p> <ul style="list-style-type: none"><li>✓ <u>Project &amp; Problem-Based Instruction</u>: Instruction that centers on hands-on, real-world activities, projects, and problems that help students to understand the knowledge and skills they develop in the classroom may be applied in everyday life. This approach scaffolds student learning through structured activities and projects that empower students to become independent in the classroom and help them build skill sets to apply to an open-ended design problem.</li><li>✓ <u>Vertical and Horizontal Teaming</u>: Horizontal and Vertical Teams will exist throughout the School and also throughout the Somerset Academy, Inc. System, creating opportunities for success in every classroom, as both grade-level and content-area teams work together to align curriculum, instruction, and assessment. These Professional Learning Communities (PLCs) will provide opportunities within the School to engage multiple teaming patterns. For example, PLCs by grade level and PLCs a cross-disciplinary teams work collaboratively to plan and implement standards-based instruction and connections across content areas, respectively. To further illustrate, in-school curriculum council meets across all disciplines, while another active PLC is meets by subject area</li><li>✓ <u>Differentiated and Standards-Based Instruction</u> –The School's ultimate goal is to provide a learning environment that will maximize the potential for student success. Teachers will use differentiated instructional strategies that connect with individual student's learning needs. Teachers will manage instructional time to meet the standards while providing motivating, challenging, and meaningful experiences for students to receive and process information in ways that require differentiation of experience. Classrooms will be arranged to enable active engagement by all student whole-group instruction; teacher-led small groups instruction (groups determined by data and depending on student need); cooperative learning groups and independent student centers.</li><li>✓ <u>K-5 Centers</u> - DI centers will be set up throughout the classroom in various areas that allow students to work independently or in a small group setting, using instructional materials to explore and expand their literacy. During this time, students are engaged in a variety of activities that reinforce and extend learning without the assistance of the classroom teacher. Students will practice reading, writing, speaking, listening, and working with letters and words. Manipulatives such as magnetic letters and sound letter cards are used to increase active participation and provide additional guided practice through multi-sensory approaches. Technology is often incorporated into the DI centers as well.</li></ul>
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## Instructional Analysis Templates

	<p>✓ <b>Technology:</b> Somerset Academy recognizes that instructional technology can facilitate learning and enhance the curriculum itself. All members of the school, including parents, will benefit from the success of the technology plan. The teachers will improve their lesson plans and delivery methods. The students will have the opportunity to be exposed to and to learn an enhanced curriculum with all the additional tools for computation and visualization.</p>
<p><b>5. Formative Assessment</b> List criteria for determining whether students have met each of the learning targets.</p>	<p>For this Required Standard, teachers can monitor students' progress as students discuss the text and retell the story using their own words and discussing the understanding of the main idea or central message.</p> <p>Teachers can also have students write a paragraph to retell a story.</p> <p>Students will show they have met the learning target by scoring 80% or higher on independent activities.</p> <p><i>Student-Friendly Knowledge Targets</i></p> <ul style="list-style-type: none"> <li>• I know that retell means to tell the story again in your own words.</li> <li>• I know that key details are the important parts of a story.</li> <li>• I know that you can retell a story using the setting, characters, problem, events, solution and the central message.</li> <li>• I know that the central message is the lesson the author is trying to teach.</li> </ul> <p><i>Student-Friendly Reasoning Targets</i></p> <ul style="list-style-type: none"> <li>• I know how to identify the most important parts of a story.</li> <li>• I can describe the central message or main idea.</li> </ul> <p><b>6. Summative Assessment</b> Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard.</p> <p>Performance Tasks administered throughout the school year, at the end of each unit of instruction and in mid-year and end-of-year summative assessments, offer students multiple opportunities to develop and demonstrate mastery of the elements of this standard.</p> <p>In each of these performance-based assessments, students read, analyze, and synthesize information. A holistic scoring rubric for each writing genre provides a way for teachers to measure student mastery of the standard. Student mastery is 80%.</p> <p><b>Knowledge Targets</b></p> <ul style="list-style-type: none"> <li>• Students must know that retell means to tell the story again in your own words.</li> <li>• Students must know that key details are the important parts of a story.</li> <li>• Students must know that you can retell a story using the setting, characters, problem, events, solution and the central message.</li> <li>• Students must know that the central message is the lesson the author is trying to teach.</li> </ul> <p><b>Sample Summative Assessment:</b></p> <p>After reading <i>Stellaluna</i>, the students will be able to retell the story by writing a paragraph about the story. The teacher will show them SWBST (somebody, wanted, but, so, and then) strategy to retell.</p>

## Instructional Analysis Templates

	<p>The student would have mastered this skill if they are able to find each of the component of SWBST (another way of using the five finger retell).</p>
<b>7. Remediation</b> Describe the processes available to provide support to students that do not meet the learning targets.	<p>Teachers can provide feedback and guide discussion when students are prompted to retell stories from the Literature Anthology and Leveled Readers.</p> <p>Teachers can also provide feedback during teacher conferences when students are expected to discuss the retelling of a story.</p> <p>Tier 2 Intervention Comprehension PDFs are available online to help students with identifying main idea and key details, summarizing, comparing and contrasting, and text connections.</p> <p>In order to remediate a student who cannot retell, the teacher can create a paper copy of the story and read the story with the child in a small group by discussing the who, what, where, and when of the story. Using a graphic organizer and pictures to help the student understand that those key details create the retelling of the story.</p>

## Instructional Analysis Templates

### Instructional Analysis for Grade 1 in Writing

*Provide a complete response for each component below (1 through 7) based on the listed Required Standard. Ensure that each response meets the criteria listed in the left-hand column and aligns with the new charter application package.*

<b>Required Standard: 1.W.1</b>	<p>Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.</p>
<b>1. Learning Targets</b> Identify the objectives students must know that align with the Required Standard and can be assessed to demonstrate mastery of the Required Standard.	<p><b>College and Career Readiness:</b> Write arguments to support claims in an analysis of substantive topics or texts using valid reasoning and relevant and sufficient evidence.</p> <p><b>Student Friendly Objectives</b></p> <p><b>Knowledge</b></p> <ul style="list-style-type: none"> <li>• I know what an opinion is.</li> <li>• I know a topic is a group of ideas, usually stated in a word or phrase.</li> <li>• I know an introduction is a sentence or group of sentences that begins a piece of writing and gives the reader an overview of the topic.</li> <li>• I know a concluding statement reinforces the ideas presented in the text.</li> </ul> <p><b>Reasoning</b></p> <ul style="list-style-type: none"> <li>• I can introduce a topic in my writing.</li> <li>• I can determine what my opinion is relevant to a topic.</li> <li>• I can reinforce ideas from my writing in my conclusion.</li> </ul> <p><b>Product</b></p> <ul style="list-style-type: none"> <li>• I can compose an opinion piece about a single topic with an introduction, reasons, and a conclusion.</li> </ul> <p><b>Vocabulary specific to standard</b></p> <ul style="list-style-type: none"> <li>• Opinion</li> <li>• Topic</li> <li>• Reason</li> <li>• Closure</li> </ul> <p>The expectation is that students learn to appreciate that a key purpose of writing is to communicate clearly to an external audience and they begin to adapt the form and content of their writing to accomplish a particular task and purpose.</p> <p>Objectives related to the writing process and target grammar skills are also aligned.</p>
<b>2. Prior Knowledge</b> List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.	<p>Throughout the year, students are taught other skills related to the Required Standard. This scaffolding helps them gain the knowledge needed to master the Required Standard. These skills include, but are not limited to, the following:</p> <ul style="list-style-type: none"> <li>• Produce writing in which the development and organization are appropriate to task and purpose. (Instruction and practice provided in every unit.)</li> <li>• Develop and strengthen writing as needed by planning, revising, and</li> </ul>

## Instructional Analysis Templates

	<p>editing. (Instruction and practice provided in every unit.) Grammar skills (Instruction and practice provided weekly.)</p>
<b>3. Instructional Plan</b> 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.	<p>Students will be required to write across the curriculum on a daily basis through the use of strategies including but not limited to reader response logs, two- column notes, perspective journal entries, completing framed paragraphs. Students writing in response to reading may include: quick-writes, mapping, brainstorming, essay questions and/or journal entries, writing a summary, a learning log entry, writing peer responses. Writing before, during, and after the main story selection from the text will provide systematic, explicit writing instruction and ample practice in spelling, grammar, usage, and mechanics daily. Conventions (capitalization, spelling, word usage, grammar and punctuation) will be emphasized at the start of the school year and continue through to the end of school.</p> <p>Any Reasearch-Based textbook provides instruction that uses the gradual release model—both within a lesson and across a week of instruction. Each week, the teacher is provided with a suggested lesson plan that can be used to guide students through the steps necessary to meet the learning targets. Grammar and writing skills lessons are prevalent each week. With appropriate modeling and guided practice, students begin to master these skills, which can be applied to different forms of writing, including informative/explanatory writing.</p> <p>Students should also be writing daily in a journal. Additionally, students are given short writing prompts each week to improve their long-form writing. Many of these prompts include writing-to-sources where students are expected to have an opinion on a topic.</p> <p><b>Guiding Questions:</b> What are the guiding questions for this lesson?</p> <ul style="list-style-type: none"> <li>○ What is an opinion?</li> <li>○ What are ways we can express our opinion?</li> <li>○ Why is it important to provide reasons to support your opinion?</li> <li>○ How can written work be shared?</li> </ul> <p><b>Hook</b></p> <ul style="list-style-type: none"> <li>○ The teacher will gather the students together and ask, "What is an opinion? What are ways we can express our opinion?" Discuss.</li> <li>○ Have students think about forming an opinion statement around their favorite pizza. Remind students that when they form an opinion statement, they usually tell what they like first and then follow that with a reason why they like it.</li> <li>○ "Think about your favorite kind of pizza. What does it have on it?" Ask random students to share their responses. Make a list on the board or on chart paper.</li> </ul>

## Instructional Analysis Templates

	<ul style="list-style-type: none"> <li>○ After 5-10 students have answered and a variety of pizza types are on the board or chart paper, the teacher will explain that now they need to think about why they like that kind of pizza. They need to think about "reasons" they like the pizza.</li> <li>○ Teacher will ask students, "Why is that your favorite?" Add students' reasons to the board/chart paper.</li> <li>○ Ask, "Why is it important to provide reasons to support your opinion?" (Poll the class on this; allow for discussion with a partner prior to answering.)</li> <li>○ Say, "Notice how we have different opinions for our favorite kind of pizza? Today we are going to learn how to share our opinion through writing, drawing, and speaking."</li> </ul>
<p><b>4. Instruction</b></p> <p>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.</p>	<p>Writing process instruction is presented through a gradual release. Students can use tools in an online Writer's Workspace to guide them through the writing process.</p> <p>First, the teacher uses an expert model lesson to model good writing. Included in this instruction is a discussion of the features that make up opinion writing. Students then use the steps of the writing process to develop their writing. Throughout the process, the teacher guides students through a series of mini-lessons that target specific writing traits meant to hit the learning targets in the Required Standard. This scaffolded approach is designed to lead students to independently create and publish their own writing.</p> <p>Students analyze the purpose and audience for their writing, choose a topic, and make a plan. They then go through the draft writing and revising phases of the writing process. During this time, they are collaborating with teachers and their student peers to strengthen their writing. Then they independently work on their revisions. Students do a final check for any further edits they need to make. After publishing their final work, they are encouraged to present it.</p> <p><b>Whole Group: Opinion On Demand Writing Assessment</b></p> <ul style="list-style-type: none"> <li>• The teacher will say to students, "today you are going to write about something that is your favorite."</li> <li>• The teacher will say to students, "I want you to think about the following choices that I am going to give you and I want you to choose one and write about why it is your favorite."</li> </ul> <p><b>Writing Prompt:</b> Write about your favorite color, flavor of ice cream, weather, or animal. Tell why and give at least two reasons.</p> <ul style="list-style-type: none"> <li>• The teacher will then have students think-pair-share to discuss their favorite thing and reasons why with their partner.</li> <li>• Directions to students: Name your favorite thing, give reasons to explain why it is your favorite and write an ending that restates your opinion.</li> </ul>

## Instructional Analysis Templates

	<ul style="list-style-type: none"><li>The teacher will ask a few students to repeat the directions to check for understanding.</li></ul> <p><b>Independent Work:</b></p> <ul style="list-style-type: none"><li>The students will return to their seats and receive their writing materials.</li><li>The teacher will then reread the prompt and the directions and set the students to task.</li></ul> <p><b>Procedure</b></p> <p>Students will be introduced through mentor text and the writing process to opinion writing. Students will be learning whole group to utilize a graphic organizer and participate in the exploration of text details. Students will be partnered for this to effectively hear and discuss reasons, explore text features, and write questions, reasons, or other supporting details. It is important to have cooperative groups for students to act in fair and caring ways. Through these interactions and student prompts, a writing community will be built.</p> <p>I use respectful talk in my group.</p>
<p><b>5. Formative Assessment</b></p> <p>List criteria for determining whether students have met each of the learning targets.</p>	<p>Teachers can conference with students throughout the writing process. These conferences are intended to provide teachers with an assessment of their students' progress.</p> <p>During the Evaluate phase of the lessons, students can use the writing rubric to identify and focus on areas that might need improvement. Teachers can also use the provided rubric and anchor papers to evaluate students' writing. Student mastery is 80%.</p> <p><i>Knowledge Targets</i></p> <ul style="list-style-type: none"><li>I know opinion writing conveys an opinion.</li><li>I know a topic is a group of ideas, usually stated in a word or phrase.</li><li>I know a fact is information that can be proven.</li><li>I know an introduction is a sentence or group of sentences that begins a piece of writing and gives the reader an overview of the topic.</li><li>I know a concluding statement reinforces the ideas presented in the text.</li></ul> <p><i>Reasoning Targets</i></p> <ul style="list-style-type: none"><li>I can introduce a topic in my writing.</li><li>I can determine what details are relevant to a topic.</li><li>I can reinforce ideas from my writing in my conclusion.</li></ul> <p><i>Sample Formative Assessment:</i></p> <p>Students will write an opinion piece about their favorite kind of cake using the attached worksheet. They will create a visual of their favorite piece of cake and will present their visual and writing piece to their classmates, speaking clearly and using complete sentences.</p> <p>The attached rubric will be used to assess mastery of the standards. If students are unable to score an 8 or more, reteaching or individual intervention is needed. Find the expectation that is giving the student trouble and reteach this portion. If speaking is the difficulty, find opportunities throughout the day for</p>

## Instructional Analysis Templates

	<p>the student to come up and present to the class (for example, calendar time, answering a question on the board). This will provide practice in speaking orally in front of others.</p>
<p><b>6. Summative Assessment</b> Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard.</p>	<p>Students partake in monthly writing prompts in class. In each of these assessments, students are expected to write an opinion piece on a book or topic. A holistic scoring rubric for opinion writing provides a way for teachers to measure student mastery of the elements of this standard. Student mastery is 80%.</p> <p><i>Product Targets</i> I can compose an opinion paper about a single topic or book with an introduction, understanding of the main idea, details, and a conclusion.</p> <p><i>Sample Summative Assessment:</i></p> <p><b>Prior Knowledge:</b> The teacher will assess prior knowledge during the hook activity by assessing if the students are able to support their opinion about their favorite pizza.</p> <p><b>During the Lesson:</b> The teacher will assess the students' understanding based on their writing ideas during the guided practice activity. If students are finding it difficult to provide detailed reasons to support their opinion, go back and reteach the lesson using more examples. To ensure all students participate, the teacher will randomly select popsicle sticks with student's names.</p>
<p><b>7. Remediation</b> Describe the processes available to provide support to students that do not meet the learning targets.</p>	<p>As part of the Evaluate phase of the lessons, teachers conference with students. During these conferences, they review the students' progress on their writing goals and discuss how further improvements can be made. Students can use blackline masters from the online Writer's Workspace to help them improve their writing. Reteaching lessons are also available online for writing skills.</p> <p>If a teacher notices that the child is not able to meet the target, they can work with the child and offer a variety of accommodations to support the learner.</p> <p><b>Speaking:</b></p> <ul style="list-style-type: none"> <li>○ Allow students to practice with a partner prior to presenting to the class.</li> <li>○ If they are unable to read their paragraph, ask them questions like: "What does your favorite cake have on it? What are some of the decorations or designs you like? What are the flavors in the cake? What do you like on top of your cake?"</li> </ul> <p><b>Writing:</b></p> <ul style="list-style-type: none"> <li>○ Provide a writing frame.</li> <li>○ Allow struggling writers to dictate their sentences to the teacher, then copy the teacher's writing onto their own paper.</li> </ul> <p><b>Drawing:</b></p>

## Instructional Analysis Templates

- Allow student to dictate how they would draw it to a peer who can draw it for them. Even though they are not drawing the picture themselves, they are working on their language skills with peers.
- Allow students to use clip art from the computer or cut out pictures from old magazines for their visual displays.

## Instructional Analysis Templates for 3-5 Grade Span

### Instructional Analysis for Grade 3 in Math

*Provide a complete response for each component below (1 through 7) based on the listed Required Standard. Ensure that each response meets the criteria listed in the left-hand column and aligns with the new charter application package.*

<b>Required Standard:</b> <b>3.NF.A.3</b>	<p>Explain equivalence of fractions in special cases, and compare fractions by reasoning about their size.</p> <p>c. Express whole numbers as fractions, and recognize fractions that are equivalent to whole numbers.</p> <p>d. Compare two fractions with the same numerator or the same denominator by reasoning about their size. Understand that comparisons are valid only when the two fractions refer to the same whole. Record results of comparisons with the symbols <math>&gt;</math>, <math>=</math>, or <math>&lt;</math>, and justify conclusions</p>
<b>1. Learning Targets</b> Identify the objectives students must know that align with the Required Standard and can be assessed to demonstrate mastery of the Required Standard.	<p>The students will be able to:</p> <ul style="list-style-type: none"> <li>Convert whole numbers into fractions, expressing whole numbers as a fraction with a denominator of 1</li> <li>Utilize the greater than <math>&gt;</math>, less than <math>&lt;</math> and equal <math>=</math> signs to represent relationships between fractions</li> <li>Describe the relationship between two fractions by analyzing them on a number line</li> </ul>
<b>2. Prior Knowledge</b> List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.	<p>Through diagnostic and benchmark testing, educators are able to identify the level of proficiency students have with each targeted element of the standard. More specifically, in the lesson, the teacher will use formative assessment to help students connect what was previously learned (schema) to new knowledge.</p> <p>For this lesson in particular, the following knowledge/skills are required prior to meeting the learning targets:</p> <ul style="list-style-type: none"> <li>Understand two fractions as equivalent if they are the same size or the same point on a number line</li> <li>Understand a fraction as a number on the number line; represent fractions on a number line diagram</li> <li>Represent a fraction <math>1/b</math> on a number line diagram <math>b</math> defining the interval from 0 to 1 as the whole and partitioning it into <math>b</math> equal parts. Recognize that each part has size <math>1/b</math> and that the endpoint of the part based at 0 locates the number <math>1/b</math> on the number line</li> <li>Recognize and generate simple equivalent fractions, such as <math>1/2=2/4</math>, <math>4/6=2/3</math>, etc. Explain why the fractions are equivalent and demonstrate using a visual model</li> </ul>
<b>3. Instructional Plan</b> Describe the process for presenting new information necessary for students to meet the learning targets. Describe the instructional strategies used to	<p><b>The lesson follows the gradual release of responsibility model (<i>I Do, We Do, You Do</i>): modeling, guided practice, independent practice.</b></p> <p>The lesson will begin with a brief review of essential to know topics outlined in the Prior Knowledge section above (section 2), focusing on the</p>

<p>lead students to meet each of the learning targets identified.</p>	<p>following elements to determine students' readiness to move forward in the lesson.</p> <ul style="list-style-type: none"> <li>• Before beginning the lesson, the teacher should ask the guiding questions. This can be done informally as a whole group class discussion to activate prior knowledge and remind students of academic vocabulary.</li> <li>• Ensure students have reviewed the following concepts:       <ul style="list-style-type: none"> <li>○ Equivalent fractions and how they are represented on a number line</li> <li>○ Common equivalent fractions</li> </ul> </li> </ul>
<p><b>4. Instruction</b> 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.</p>	<ol style="list-style-type: none"> <li>1. Without discussing fractions, give the students a number line with 0 and 1 marked off and pose this question to the students: <i>"Landri is going to a baseball game with her dad. She asks dad how far they have traveled. He tells her they have traveled 1/3 of the way so far. Landri asks him what that means. Use a number line to show Landri how far they have traveled on their trip."</i></li> <li>2. The teacher can gather information about the student's prior knowledge by their placement of 1/3 on the number line and by their explanation of how far Landri has traveled.</li> <li>3. The teacher can use this information to decide if he/she can move onto ordering fractions on the number line.</li> <li>4. After several minutes of working independently, allow the students to discuss their responses within their groups. While students are working, walk around the class noticing how students are answering the problem. Choose several students that have explained their thinking in different ways to share with the rest of the class. After allowing enough time for everyone to finish, call those students one at a time to place their work under the document camera to share their thinking.</li> <li>5. After a few students share their responses, give each group a small piece of string and tell them it represents ? of the distance Landri has traveled. Ask students: If this represents ? of the distance how far is the whole distance?</li> </ol> <p><b>Teacher note:</b> This allows the students to iterate (repeat) ? to make a whole.</p> <p><b>Guided Practice (We Do)</b> Students will be working in small groups to answer the following questions. Manipulatives such as fraction bars, number lines (attached), etc. should be accessible to the students.</p> <ol style="list-style-type: none"> <li>1. Using a model, have students look at other distances to a stadium to determine the answers to these inequality problems. The students will use inequality symbols (<math>&lt;</math>, <math>&gt;</math>, <math>=</math>) to complete these problems. <i>1/4 of a mile _____ 1/2 of a mile</i></li> </ol>

	<p><i>1/6 of a mile</i> <input type="checkbox"/> <i>1/10 of a mile</i> <input type="checkbox"/>  <i>1/3 of a mile</i> <input type="checkbox"/> <i>1/8 of a mile</i> <input type="checkbox"/></p> <p>2. The students are given a number line from 0 to 1 with the fractions <math>\frac{1}{2}</math>, <math>\frac{1}{3}</math>, <math>\frac{1}{4}</math>, <math>\frac{1}{8}</math> labeled in that order. (<b>Fractions Attachment</b>) Have the students correct the number line and explain what misconceptions this student has. As students are answering this question, the teacher walks around the room with observing students and deciding who can be pulled to a small group to work on the concept.</p>
<p><b>5. Formative Assessment</b>  List criteria for determining whether students have met each of the learning targets.</p>	<p>At key points throughout the lesson, the teacher will take stock of which students are mastering the content and which students will need additional instruction. At these junctures, the teacher will track students' progress on a formative assessment tracker sheet—which includes a roster of each of the students with boxes indicating those check points. The teacher will highlight the names of students who are in need of additional instruction and designate time for reteaching in small groups either during the same class period or in the next class period, depending on the concept and number of students needing it.</p> <p>The first question listed in the Guiding Questions section will be used by the teacher to inform their instruction for the rest of the lesson. The teacher could take anecdotal records of the student's responses.</p> <p>The teacher will have students answer the following questions to check for understanding throughout the lesson:</p> <p><b>During Prior Knowledge Review:</b>  Can the students place fractions correctly on a number line?</p> <p><b>During Engage:</b>  How do you know how far Landri and her dad have traveled? Can you prove that in a different way? Ask the students if someone can explain their solution differently than has already been explained.</p> <p><b>During Guided:</b>  <u>While students are working on inequalities:</u></p> <ul style="list-style-type: none"> <li>• How do you know that fraction is greater than or less than?</li> <li>• Can you show me using a manipulative how you came to that solution?</li> <li>• Can you make up an inequality problem on your own?</li> </ul> <p><u>While students are working on attachment:</u></p> <ul style="list-style-type: none"> <li>• What misconception does this student have?</li> <li>• How can you prove that this student is incorrect?</li> </ul> <p>The students will receive feedback the teacher while working on the questions. The teacher will use student responses to determine which students are in need of additional instruction and remediation.</p>

<p><b>6. Summative Assessment</b> Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard.</p>	<p><b>Teacher will use the following assessment of knowledge to determine mastery of the concepts taught:</b></p> <p>Brent, Kaity, Zach, Zoie and Bre are all trying out for the track team. They are asked to run as far as possible in a certain amount of time. A horn will sound when time is up. When the horn sounds Brent has run <math>\frac{1}{3}</math> of a mile, Kaity has run <math>\frac{1}{8}</math> of a mile, Zack has run <math>\frac{1}{6}</math> of a mile, Zoie has run <math>\frac{1}{2}</math> of a mile and Bre has run 1 mile. Use a number line to show how far each child has run.</p> <p><b>Students will answer the problem by translating into a mathematical expression and demonstrating their rationale by illustrating the runners' distance on a number line.</b></p>
<p><b>7. Remediation</b> Describe the processes available to provide support to students that do not meet the learning targets.</p>	<p>In addition to the opportunities throughout the lesson to have checkins with the teacher, students who have not demonstrated they are on target to master the material as measured by the formative assessments the teacher has conducted will be designated for additional instruction through small group reteaching with the teacher. The teacher will pull students into a group for reteaching and/or will push into the students' small groups to provide remediation for students to be able to move forward in the lesson and master the material.</p> <p>Additional resources/materials to be used in order to fill gaps in students' understanding include:</p> <ul style="list-style-type: none"> <li>• Using manipulatives with fraction bars to work with students to model the inequalities they were asked to work on throughout the lesson</li> <li>• Provide additional examples for students of fractions to model with the manipulatives</li> <li>• Have students draw the fractions to work on the concept. They can then work on other inequalities and teacher can scaffold up to the inequalities in the lesson</li> </ul>

#### Instructional Analysis for Grade 4 in Science

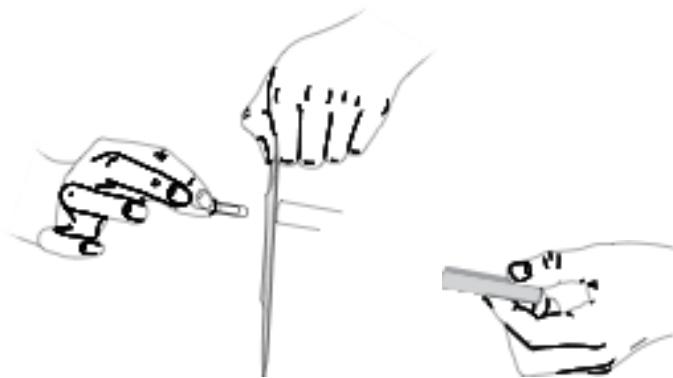
Provide a complete response for each component below (1 through 7) based on the listed Required Standard. Ensure that each response meets the criteria listed in the left-hand column and aligns with the new charter application package.

Required Standard: <b>4.P2U1.3</b>	Develop and use a model to demonstrate magnetic forces.
<p><b>1. Learning Targets</b> Identify the objectives students must know that align with the</p>	As stated in the Arizona Science Standards, "Energy is present whenever there are moving objects, sound, light, or heat. When objects collide, energy can be transferred from one object to another, thereby changing their motion. In such collisions, some energy is typically also transferred

<p>Required Standard and can be assessed to demonstrate mastery of the Required Standard.</p>	<p>to the surrounding air; as a result, the air gets heated and sound is produced. Light also transfers energy from place to place. For example, energy radiated from the sun is transferred to Earth by light. When this light is absorbed, it warms Earth's land, air, and water and facilitates plant growth. Energy can also be transferred from place to place by electric currents, which can then be used locally to produce motion, sound, heat, or light. The currents may have been produced to begin with by transforming the energy of motion into electrical energy (e.g., moving water driving a spinning turbine which generates electric currents). <sup>4(p. 125)</sup> The faster a given object is moving, the more energy it possesses. Energy can be moved from place to place by moving objects or through sound or light. (Boundary: At this grade level, no attempt is made to give a precise or complete definition of energy.)<sup>4(p.122)</sup> For example, energy radiated from the sun is transferred to Earth by light. When this light is absorbed, it warms Earth's land, air, and water and facilitates plant growth.<sup>4(p.125)</sup> The expression "produce energy" typically refers to the conversion of stored energy into a desired form for practical use—for example, the stored energy of water behind a dam is released so that it flows downhill and drives a turbine generator to produce electricity. Food and fuel also release energy when they are digested or burned. When machines or animals "use" energy (e.g., to move around), most often the energy is transferred to heat the surrounding environment. The energy released by burning fuel or digesting food was once energy from the sun that was captured by plants in the chemical process that forms plant matter (from air and water). (Boundary: The fact that plants capture energy from sunlight is introduced at this grade level, but details of photosynthesis are not.) It is important to be able to concentrate energy so that it is available for use where and when it is needed. For example, batteries are physically transportable energy storage devices, whereas electricity generated by power plants is transferred from place to place through distribution systems." <sup>4(p. 129)</sup></p> <p>Crosscutting Concepts: cause and effect; systems and system models; energy and matter<sup>4</sup></p> <ul style="list-style-type: none"> <li>• The student will understand that magnets are objects that give off magnetic fields. These objects attract, or pull, other objects that contain magnetic material.</li> <li>• The student will understand what materials are magnetic or not.</li> <li>• The student will understand that magnets have two different poles.</li> <li>• The students will understand the concept of repel and attract (force).</li> <li>• Magnetic forces push or pull even if objects don't touch the magnet.</li> <li>• Magnets can push or pull at a distance and through different materials.</li> </ul>
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	<ul style="list-style-type: none"> <li>The student can create a representation or model of magnetic forces at work.</li> </ul>
<b>2. Prior Knowledge</b> List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.	<p>In Grade 3 and according to the Arizona Science Standards students should have covered, "The faster a given object is moving, the more energy it possesses. Energy can be moved from place to place by moving objects or through sound or light. (Boundary: At this grade level, no attempt is made to give a precise or complete definition of energy.)<sup>4(p. 122)</sup> Energy is present whenever there are moving objects, sound, light, or heat. When objects collide, energy can be transferred from one object to another, thereby changing their motion. In such collisions, some energy is typically also transferred to the surrounding air; as a result, the air gets heated and sound is produced. Light also transfers energy from place to place. For example, energy radiated from the sun is transferred to Earth by light. When this light is absorbed, it warms Earth's land, air, and water and facilitates plant growth.<sup>4(p.125)</sup></p> <p>Crosscutting Concepts: cause and effect; scale, proportion, and quantity; systems and system models; energy and matter; stability and change<sup>4</sup></p> <p>Prior knowledge of basic magnetism will be used to introduce the topic. The teacher will give students two magnets. The teacher will allow the students to use their prior knowledge to discuss in groups the major concepts. Key words to hear: attract, repel, north, south, connect, push...etc.</p>
<b>3. Instructional Plan</b> 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.	<p>Lessons are designed using the 5 E instructional model so students build new ideas on top of prior knowledge. In the Module Opener, students will be introduced to the module phenomenon by showing the photo of the Grand Canyon. Students will be asked to think of question they have related to how Earth's features are formed. By the end of the module, they will have collected data to use as evidence to support the prediction in their Performance Project, which is part of the Module Wrap-up.</p> <p><i>5E's Instructional Model</i> (process for presenting new information and instructional strategies):</p> <ul style="list-style-type: none"> <li>✓ <i>Engagement</i> - Teacher engages students with scientific questions and/or defining problems about an event or phenomenon; Learner engages in scientifically oriented questions</li> <li>✓ <i>Explanation</i> - Teacher guides students to analyze and interpret data, synthesize ideas, build models and explain their conceptual understanding of scientific knowledge; Learner analyzes and interprets data, synthesizes ideas, build models and formulates explanations from evidence</li> <li>✓ <i>Exploration</i>- Teacher guides students to explore science concepts through hands-on experiences, formulate and test hypotheses, and solve problems; Learner gives priority to evidence in responding to questions</li> <li>✓ <i>Extension/Expansion/Elaboration:</i> Learner connects explanations to scientific knowledge - Learner communicates and justifies explanations</li> </ul> <p><i>Evaluate</i> (ongoing throughout the 5E's Cycle): Teachers will assess student learning through one or more of the following: observations, whole group open forums, Science Journaling, Inquiry-based labs, etc.; Students answer questions, pose questions, and evaluate own understanding of the concepts explored</p>

	<p>Additional instructional strategies employed in the lesson include:</p> <ul style="list-style-type: none"> <li>• Kagan structures (utilized during the explore section to engage students in cooperative learning)</li> <li>• Gradual release of responsibility model (utilized throughout the explain-elaborate-evaluate sections [I DO; we DO; you DO])</li> </ul>
<p><b>4. Instruction</b></p> <p>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.</p>	<p>At the beginning of each lesson, students will complete a (Page Keeley) Science Probe to identify possible misconceptions. Students revisit the probe throughout the lesson to revise their answers. Students get a chance to become familiar with the <i>Stream Table</i> modeling tool before using it later in the lesson.</p> <p>In the <b>Engage</b> section, students will be introduced to a STEM Career and use prior knowledge to try to answer the “Essential Question.” <i>How is magnetism used daily and in real life? Teacher will introduce the STEM Career- computer engineers and electrical engineers.</i></p> <p>In the <b>Explore</b> section, students will use prior knowledge to write a prediction for an investigation by participating in a hands-on inquiry activity or simulation. Children observe whether the force of a magnet is affected if different materials are placed between the magnet and a paper clip.</p> <ol style="list-style-type: none"> <li>1. Divide children into groups and pass out a clear plastic container with a paper clip sealed inside, a paper bag of materials, and a bar or donut magnet to each group.</li> <li>2. Explain to the children that they need to complete the following three investigations during the exploration: <ul style="list-style-type: none"> <li>• Try to move the paper clip around in the re-sealable plastic container using the magnet.</li> <li>• Test whether the force of the magnet works through each material found in the group’s paper bag. You might call on volunteers and model how children can test each material: <ol style="list-style-type: none"> <li>1. Ask one volunteer to hold the magnet.</li> <li>2. Have a second volunteer select one of the materials from the bag and hold it up against the magnet.</li> <li>3. Place a paper clip close to the material directly opposite of the magnet and see whether it is pulled toward the magnet. (Make sure the children see that you are placing the paper clip opposite of where the magnet is touching the material on the other side.) If children do not feel a pull at first, encourage them to move the paper clip even closer to the material.</li> </ol> </li> </ul> </li> </ol>



- Visit the water station set up in the classroom and investigate whether the force of a magnet works through water by completing the following steps:
  - a. Drop a paper clip into the cup of water.
  - b. Slowly lower the magnet in the water towards the paper clip and observe what happens.
  - c. Remove the magnet and paper clip from the water and dry the magnet with a paper towel so it is ready for the next group.
- 3. Direct children's attention to [page 5 of their science notebooks](#) and tell them that they need to record their observations in the space provided.
- 4. Give children ample time to test all the materials in their bag, test the paper clip in the re-sealable container, and visit the water station.
- 5. Students can then use any of the above tested ways of showing magnetism to finally represent their model. They may use any of the

	<p>materials presented or their own (clay, paper, crayons, the computer (any program to represent it digitally)).</p> <p>In the <b>Explain</b> section, students will be presented with new information and key vocabulary through reading a variety of text (Ex.: Handbook, Leveled Readers, Science Files, Investigator's article, videos, simulations, digital interactives, Foldables). They will use this information to help explain the phenomena they are studying.</p> <p>In the <b>Elaborate</b> section, students will further research/investigate information related to the learning target and communicate their findings.</p> <p>In the <b>Evaluate</b> section, students will complete the Performance Task to collect data to support their prediction. By the end of the section, students should revisit the “Essential Question” and revise their answers based on what they have learned.</p> <p>Ask students to choose a question that they could “test” through further experimentation. Then ask them to brainstorm some hypotheses (proposed explanations) that could answer their question. As a class, choose one hypothesis, have students design an experiment to test it, run the experiment, gather results, and analyze the results. Then ask students to review their hypothesis and draw conclusions. Was their hypothesis supported? If not, do they have a new hypothesis that might explain it? What can they conclude about what happened during their experiment, and how this “model” can help them to understand the real world? This process – which starts with a question that is investigated and leads to more questions that are investigated in turn – reflects the process of scientific inquiry. As researchers spiral through the process, they gain more understanding and build more knowledge about the world. This is how scientific information is generated and refined over time.</p>
<p><b>5. Formative Assessment</b></p> <p>List criteria for determining whether students have met each of the learning targets.</p>	<p>At key points throughout the lesson, the teacher will take stock of which students are mastering the content and which students will need additional instruction. At these junctures, the teacher will track students' progress on a formative assessment tracker sheet—which includes a roster of each of the students with boxes indicating those check points. The teacher will highlight the names of students who are in need of additional instruction and designate time for reteaching in small groups either during the same class period or in the next class period, depending on the concept and number of students needing it.</p> <p>Throughout the lesson, teacher has numerous opportunities to monitor students' learning by using the <b>Quick Checks</b> as a quick assessment to determine whether students are ready to move on. <b>Reflect and Refine</b> allows students to go back to the Page Keeley Science Probe to decide whether they would like to change their response or justify their answer.</p> <p>In addition, other formative assessments are embedded throughout the lesson to help students reflect throughout the learning progression, including:</p> <ul style="list-style-type: none"> <li>• Student responses to the Essential Question</li> <li>• Science and Engineering Practices Self-Assessment “I will” statements and “I can” statements</li> <li>• Writing and Presenting Findings</li> <li>• Student model accurately describing magnetic forces</li> </ul>

<p><b>6. Summative Assessment</b></p> <p>Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard.</p>	<p>Students will demonstrate mastery of the topic at the end of the module by completing the Performance Project in the Wrap-Up section at the end of the module.</p> <p>Student mastery is 80%.</p>
<p><b>7. Remediation</b></p> <p>Describe the processes available to provide support to students that do not meet the learning targets.</p>	<p>In addition to the opportunities throughout the lesson to have checkins with the teacher, students who have not demonstrated they are on target to master the material as measured by the formative assessments the teacher has conducted will be designated for additional instruction through small group reteaching with the teacher. The teacher will pull students into a group for reteaching and/or will push into the students' small groups to provide remediation for students to be able to move forward in the lesson and master the material.</p> <p>Additional resources/materials to be used in order to fill gaps in students' understanding include:</p> <ul style="list-style-type: none"> <li>• Lesson Vocabulary Flashcards (digital)</li> <li>• Digital Interactives (digital)</li> <li>• Foldables (print)</li> <li>• Graphic Organizers (print)</li> <li>• Differentiated Instruction strategies</li> </ul> <p>The teacher will use these exercises as need is demonstrated based on the formative assessments as well as teacher observations and prior assessment used in the classroom (diagnostic assessment, etc.)</p>

## Instructional Analysis for Grade 5 in Reading

Provide a complete response for each component below (1 through 7) based on the listed Required Standard. Ensure that each response meets the criteria listed in the left-hand column and aligns with the new charter application package.

Required Standard: <b>5.RI.2</b>	<p>Determine two or more main ideas of a text and explain how they are supported by key details; summarize the text.</p>
<p><b>1. Learning Targets</b> Identify the objectives students must know that align with the Required Standard and can be assessed to demonstrate mastery of the Required Standard.</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> <li>• summarize the points Kid President makes and explain how each claim is supported by reasons and/or evidence</li> <li>• determine the main idea in each of the three sections of a text excerpt from an inaugural address by President Clinton</li> <li>• determine an overall main idea for the text excerpt from an inaugural address by President Clinton</li> <li>• write a well-organized opinion piece making the topic and their opinion clear and providing appropriate reasons and evidence to support their opinion</li> <li>• take on the roll of Kid President and report on a topic, clearly presenting their opinion, reasons, and supporting evidence</li> <li>• utilize effective verbal and nonverbal public speaking skills during their presentation to engage their audience in the topic</li> </ul> <p>Guiding Questions:</p> <ul style="list-style-type: none"> <li>• What does it mean to summarize?</li> <li>• Why is it important to know how to summarize?</li> <li>• Why do people state their opinions?</li> <li>• What have you read that included other people's opinions?</li> <li>• How can opinions be supported with evidence?</li> <li>• What is a claim?</li> <li>• What is evidence?</li> <li>• Why is it important to support a claim with reasons or evidence?</li> <li>• How can evidence or reasons support opinions and claims?</li> </ul>
<p><b>2. Prior Knowledge</b> List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.</p>	<ul style="list-style-type: none"> <li>• Students should know the term main idea and how to identify main ideas and supporting details in a text.</li> <li>• Students should know how to identify reasons and evidence a speaker or writer provides to support particular points.</li> <li>• Students should know the difference between reasons and evidence. If teachers need to review these concepts with students the following information might be a helpful place to start: <ul style="list-style-type: none"> <li>▪ The claim usually answers the question: What do I think?</li> <li>▪ A reason should answer the question why: Why do I think this?</li> <li>▪ Evidence should answer the questions what, when, or how: How do I know this is the case? Evidence supports the reason and refers back to the claim.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>▪ Start with a claim, support it with important and specific reasons, back up those reasons with relevant evidence/examples/proof.</li> <li>• Students should understand the difference between fact and opinion.</li> <li>• Students should have knowledge of and be able to write opinion pieces using appropriate reasons and relevant evidence to support an opinion.</li> <li>• Students should know how to report on a topic, tell a story, or recount an experience in an organized manner.</li> <li>• Students should have had some practice prior to this lesson with giving a presentation and using good verbal and nonverbal public speaking skills.</li> </ul>
<p><b>3. Instructional Plan</b></p> <p>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.</p>	<p>The lesson follows the gradual release of responsibility model (<i>I Do, We Do, You Do</i>): modeling, guided practice, independent practice.</p> <ul style="list-style-type: none"> <li>• Before beginning the lesson, the teacher should ask the guiding questions. This can be done informally as a whole group class discussion to activate prior knowledge and remind students of academic vocabulary.</li> <li>• Ensure students have reviewed the meaning of: <ul style="list-style-type: none"> <li>○ <b>Claim:</b> a statement that can be disputed or argued, act of stating something that can be argued. A claim usually answers the question: What do I think (this is your opinion)? Ex: Josh believes that he is the best plumber in town.</li> <li>○ <b>Reasons:</b> a reason should answer the question why: Why do I think this? Ex: Josh believes he is the best plumber in town because he always receives a 100% satisfaction rating.</li> <li>○ <b>Evidence:</b> anything that can support or serve as examples or proof to support the reason and claim. Evidence should answer the questions what, when, or how. How do I know this is the case? Ex: With Josh's plumbing work at city hall, the police station, and the local elementary school he received the rating of "excellent" for all the categories on his feedback form. In addition, the managers at city hall were so pleased with his work, last year they recommended him to the owner of the baseball stadium to fix the stadium's plumbing. With his work at the stadium, he received the rating of "excellent" in all categories again, and to this day, the plumbing has never needed additional repairs.</li> <li>○ Give students a scenario and have them share out some examples of making a claim, providing a supporting reason, and then backing it up with specific evidence.</li> </ul> </li> </ul>

<p><b>4. Instruction</b></p> <p>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.</p>	<ol style="list-style-type: none"> <li>1. Engage students by showing them the <a href="#">Kid President Video</a> and giving them the <a href="#">summarizing handout</a> to fill out.</li> <li>2. Students will share out with the class what they filled out on the graphic organizer.</li> <li>3. Ask, "Were those opinions or facts that Kid President presented to us?" Challenge students when they give you answers by saying, "How do you know they were his opinions or facts?"</li> <li>4. Ask, "Can opinions be supported by reasons or evidence?"</li> <li>5. Ask, "How did Kid President support his opinions with reasons and/or evidence?" (Depending on which examples students pick from the video, they might pick an example of a reason or an example of a piece of evidence.)</li> <li>6. Say, "WOW, do you know that you have just linked reasons and/or evidence to Kid President's claims?"</li> <li>7. Then collect student responses, so that you can formatively evaluate what they wrote and pull small groups as needed.</li> <li>8. Let the students know that today they will be Kid Presidents. Say, "Today, something amazing is happening. You all are going to work on becoming a Kid President. We are going to talk about opinion writing, how to link evidence to claims and reasons, and summarizing. Once we finish our lesson, you will write an opinion piece and present it to your classmates. You will get to express your own opinion, with evidence of course, on any topic that you think is important in order to empower other kids, just like Kid President does."</li> <li>9. After the video and Teaching Phase, the teacher should review the learning objectives for this lesson. It is recommended that teachers chunk out the goals so that students are not overwhelmed with the expectations. Present this goal first: <b>Students will be able to summarize the points a speaker makes.</b></li> <li>10. Say, "Students, today we are going to learn how to summarize a speaker's points."</li> <li>11. Ask the class, "Has anyone ever been in a conversation with someone before and they talk and talk and talk? And you are thinking to yourself - just get to the point. Well today we are going to figure out how to get to the point so that we don't drag on and on in conversation or writing. This is a life skill that will benefit you throughout your academic and social lives."</li> <li>12. The teacher will ask students to take out their Reader's Notebooks. The teacher will create an Anchor Chart as students take notes in their Reader's Notebooks. Anchor Charts: Use large chart part to create a visual of your thinking so that students can see it throughout the lesson. Usually these are hung up around the room for students to reference. An example Anchor Chart may be found <a href="#">here</a>. Each part of the chart should be explained and modeled.</li> <li>13. The teacher should conduct a Think-Aloud of the skill of summarizing the Kid President video as an example. To assess students' understanding of the Kid President video some example think aloud questions could be: <ul style="list-style-type: none"> <li>• "Who was the speaker?"</li> </ul> </li> </ol>
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- "What message or main idea did the speaker want you to get from his speech?"
- "What were some details he used to convince you of his message?"
- "Did you hear any key words that stuck out to you when he was talking?"

The answers to these questions should be written on the whiteboard for students to see and copy down in their Reader's Notebooks.

14. The teacher should then write a summary based on student responses. Students should copy this summary in their notebook and follow along as the teacher models the summarizing strategy. An example summary could look like this:

Kid President wants us to make the world a better place. He believes we are all made to be awesome and that we should share that awesomeness with everyone around us. Take his advice and don't be boring, because boring is easy and don't ever quit or give up. Think of all the people in the world who are awesome, they didn't give up the first time they failed. It's your time, our time, let's do great things!

15. Once the summary is finished, refer back to the Anchor Chart to make sure the class has met the requirements for a strong summary.

16. Once students have copied everything in their Notebooks, give students a copy of the article ([Renewing America from ReadWorks.org](http://Renewing America from ReadWorks.org)--teachers will have to sign up for a free account to access the article), sticky notes, and two different colored highlighters to each student.

17. Say, "Today we are going to practice looking for evidence to support the main ideas of this text. We will be reading *Renewing America*."

18. Say, "This is an excerpt from President Bill Clinton's First Inaugural Address in 1993."

- Can someone tell me what the word "excerpt" means?
- And what does the word "inaugural" mean?
- Who is the speaker in this text?"

The teacher should explain that Bill Clinton is the speaker in this situation and he wrote this speech for a reason. We will be listening to hear what his main ideas were in this speech.

19. Say, "As I read this text I want you to be thinking of the main idea of each section and what details helped you to come up with the main idea for each section. We are going to chunk out this text. Sometimes we do this when we have a long article to help us better understand the content. Before we begin, let's mark where each section begins and ends. (Students chunk text by marking it) We will pause after reading each section to write down the main ideas of each section or chunk. Each page will be considered a section. So we will stop after each page and pull out the main idea for each page. Now, follow along as I read out loud."

20. The teacher will read each section of the text out loud to the students. Once the teacher has finished reading each section, have students write down on a sticky note what they think the main idea of each section of the text is.

21. Once the students have finished writing their main ideas, put them into groups of 2-3 for partner reading. Students should be grouped heterogeneously based on reading levels to ensure all levels of learning are met. Students will re-read the text with their partner(s) and this time they will use one color highlighter to highlight/color code the main idea for each chunk/section in one color, along with supporting details in another color as they and their partners read. After the entire excerpt is read, students will compare highlights and discuss their thinking with their partner.
22. Once everyone has finished partner reading and highlighting, have students share out what they thought the main ideas were. \*Here are some suggestions on possible student responses for this article:
- **Section 1 Main Idea:** Make change your friend. **Supporting Evidence:** We have not changed and now our resources are eroding, our economy is a mess, citizens don't have confidence in their country. People are working more for less, living with the fear of crime, and millions of poor children cannot imagine a different future for themselves.
  - **Section 2 Main Idea:** We must recognize and use our strengths to rise up to the challenges together. **Supporting Evidence:** Americans are relentless, questing, hopeful, we always muster determination to construct from crises, we don't shrink from challenges, and we must play a part in the renewal.
  - **Section 3 Main Idea:** We need each other and we need to serve and care for others. **Supporting Evidence:** Help troubled children, keep company with those in need, reconnect with torn communities.
  - **Overall Main Idea:** We need to work together and for each other in order to make changes to our country.
23. "Say, "Isn't it amazing to hear how motivating people can be? Did anyone see a connection between the Kid President's main idea and former President Clinton's main idea? What were some of their similar points?" Now, I want you to look at your sticky note and your highlights and see if you think you should change what you think the overall main idea is based on the important details you have highlighted in the text. If so, write your new main idea on another sticky note.
24. Say, "Now, that you have worked so hard to determine the main ideas and supporting details, I want you to summarize this text."
25. At this point, the teacher should review the [Summary Anchor Chart](#) again.
26. Say, "On a separate sheet of paper, I want you to summarize the text we have just read."
27. The teacher should pull a small group of struggling students to the back table in order to help prompt them on starting their summaries. This small group should consist of 3-5 students. The students should bring all of their materials: Reader's Notebook, ReadWorks text, pencil, paper, sticky notes, and highlighters to the small group area.
28. Students will turn in their papers when they are finished so the teacher can assess their work and provide feedback as needed.

	<p>29. The teacher will ask students to review the ways in which we write a summary (refer to the Summary Anchor Chart) as a wrap up activity. Students may share out what they learned that day.</p>
<p><b>5. Formative Assessment</b> List criteria for determining whether students have met each of the learning targets.</p>	<p>The teacher will be able to gather information about student understanding through:</p> <ul style="list-style-type: none"> <li>○ The teacher will give verbal feedback during the informational article activity when students are working to determine the main ideas and supporting details.</li> <li>○ The teacher will check in with students as they write information in their Reader's Notebooks during note taking such as the summary Anchor Chart and summary writing of the informational article.</li> <li>○ As students create their own opinion writing piece, the teacher will circulate the room to make sure that their opinion and reasons and evidence align with each other and their topic. If the teacher notices that student/students' choices do not make sense, then the teacher can ask the following guiding questions to gauge their understanding and help to clarify any misconceptions to encourage them in the right direction. Guiding questions include:</li> </ul> <ol style="list-style-type: none"> <li>1. "What is the topic of your piece?"</li> <li>2. "Can you tell me your opinion (claim) that relates to your topic?"</li> <li>3. "What might be a way to prove or support your opinion?" or "Can you give me some reasons or evidence that would help support your opinion?"</li> <li>4. "Now, can you tell me another reason that relates to your opinion?"</li> <li>5. "How might you prove or support that reason?" or "What is the evidence that supports what you are saying?"</li> </ol>
<p><b>6. Summative Assessment</b> Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard.</p>	<p>Students will generate their own summaries of the writing piece, including relevant details, taking on the roll of Kid president. Students will report on a topic, clearly presenting opinions, reasons and supporting evidence.</p> <p>- The teacher will utilize the following rubric to assess the students' mastery of the standard: <a href="#">Opinion Writing Rubric</a></p>
<p><b>7. Remediation</b> Describe the processes available to provide support to students that do not meet the learning targets.</p>	<p>Students will be given opportunities throughout the lesson to have check-ins with the teacher, allowing time for correcting of misconceptions throughout the lesson. After the lesson, the teacher will use the formative assessment to determine what to reteach for which students in small groups in subsequent lessons.</p> <p>Student supports include:</p> <ul style="list-style-type: none"> <li>○ After the teacher has looked over students' work from the summarizing activity with the Kid President video, the teacher will</li> </ul>

group students in order to remediate struggling students. The teacher should work in a small group setting using their Summarizing Formative Assessment papers. The teacher will review each section of the handout (Who, Claim, Reasons, Evidence, Main Idea) one at a time to ensure students understand the meaning of those words and concepts.

## Instructional Analysis for Grade 3 in Writing

Provide a complete response for each component below (1 through 7) based on the listed Required Standard. Ensure that each response meets the criteria listed in the left-hand column and aligns with the new charter application package.

Required Standard: <b>3.W.2</b>	<p>Write informative/explanatory texts to examine a topic and convey ideas and information clearly.</p> <p>a. Introduce a topic and group related information together; include illustrations when useful to aiding comprehension.</p> <p>b. Develop the topic with facts, definitions, and details.</p>
<b>1. Learning Targets</b> Identify the objectives students must know that align with the Required Standard and can be assessed to demonstrate mastery of the Required Standard.	<p>Students will be able to:</p> <ul style="list-style-type: none"> <li>Determine the main idea and key details from the provided texts</li> <li>Produce their own main idea and key details in an original work</li> <li>Write an informative text</li> </ul>
<b>2. Prior Knowledge</b> List the knowledge/skills that are required prior to meeting learning targets. Describe how prior knowledge will be used to introduce the learning targets.	<p>Students should be able to:</p> <ul style="list-style-type: none"> <li>Ask and answer questions about informational text.</li> <li>Identify the main topic and key details of an informational text.</li> <li>Write an informative outline using grade-appropriate organization, grammar, and conventions.</li> </ul>
<b>3. Instructional Plan</b> 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.	<p>The lesson follows the gradual release of responsibility model (<i>I Do, We Do, You Do</i>): modeling, guided practice, independent practice.</p> <p>The process for presenting new information in the lesson is as follows:</p> <ol style="list-style-type: none"> <li>Complete the whole group activity using the main idea <a href="#">PowerPoint</a>.</li> <li>Show the video on main idea and details found at <a href="http://www.brainpop.com/english/writing/mainidea/">http://www.brainpop.com/english/writing/mainidea/</a>.</li> <li>Read the guiding question(s) aloud (they should be posted so you can refer back to them throughout the lesson). Discuss.</li> </ol> <p>Guiding Questions:</p> <ul style="list-style-type: none"> <li>Why is it important to ask and answer questions about what we read?</li> <li>Why should we use examples from the text to support our answers?</li> <li>How do we determine the key details in an informational text?</li> <li>How does knowing the key details help us determine the main idea of an informational text?</li> <li>How does comparing and contrasting two texts on the same topic help us better understand both the texts and the topic?</li> </ul>

**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.

**First Reading: Day 1**

1. Provide students with a copy of a KWL chart (see CPALMS Related Resources for template). Ask students to fill in the "Know" column of the KWL chart with information they already know about dolphins. Have the students share one thing that they already know about dolphins with the class. Then the students will fill in the "What I want to learn" column. Allow students to share one thing they want to learn with a partner before proceeding.
2. Provide students with a copy of the excerpt, "[Dolphins](#)", from *Dolphins and Sharks: A Nonfiction Companion to Dolphins at Daybreak* by Mary Pope Osborne. Tell the students that, for the first reading of this text, they are going to look for words they may not know and questions they may have while reading the text. Read the text, allowing students to mark the text by underlining words they don't know and placing a question mark by any sections that they have a question about. When the first reading is complete, provide students with two sticky notes: one for listing words they don't know and the other for writing their question(s).
3. Collect the sticky notes. First focus on the vocabulary words the students have identified. Create a three-column chart with these headings: *word*, *clues*, and *meaning*. Model with these words: *mammals*, *shallow*, *curious*. Read them in context and look for clues to their meaning. Then create a student friendly definition and record it on the chart. Continue with other words the students identified until all words are defined.
4. Read the questions the students had, referring back to the text for answers to the questions. If the answer is not found in the text, discuss where the answer could be found (you can either look up the information later or ask student volunteers to find the information as an extension).
5. Allow students to write down any new information they learned on their KWL in the last section.
6. Review guiding questions:
  - Why is it important to ask questions and answer questions about what we read?
  - Why should we use examples from the text to support our answers?
  - **Guided Practice: What activities or exercises will the students complete with teacher guidance?**

**Second Reading: Day 2**

1. Have the students get out their text, "Dolphins." Tell them that today's focus will be on answering text-based questions while rereading the excerpt, "Dolphins." NOTE: You can post the questions and have them write the answers or highlight the text where the answers are found, or you can present the questions orally.
  - What do all mammals have in common? (All mammals are warm-blooded, have lungs and breathe air, give birth, and drink their mother's milk.)

- How fast can most dolphins swim? (Most dolphins can swim at a speed of 15 miles per hour.)
- Where do dolphins get their power? (Their power comes from strong tail flukes which move up and down.)
- How do dolphins breathe? (Dolphins breathe through a blowhole. They come up to the surface of the water to exhale and inhale air.)
- Why are bottlenose dolphins called bottlenose? (Bottlenose dolphins are called bottlenose because their noses are shaped like bottles.)
- What are scientists' opinions of bottlenose dolphins? (Scientists think they are the most intelligent dolphins.)
- Why does the author think bottlenose dolphins swim near people in the water? (They seem curious.)
- What is the topic of this text? (Dolphins)

### **Third Reading: Day 3**

1. Ask, "How do we determine the key details in an informational text? How does knowing the key details help us determine the main idea of an informational text?" Discuss. Explain that the main topic is a word or phrase that tells what the text is about, while the main idea of a text is usually a statement that tells what the topic is and the point that author wants the reader to understand. A main idea is supported by key details in the text.
2. Provide students with a copy of the Main Idea Graphic Organizer (See CPALMS Related Resources for template). Tell the students that, for this reading, they will work with a partner to identify the key details and main ideas in the text. Model using the first paragraph. For example, key details include: *mammals are warm-blooded, mammals have lungs and breathe air, mammals give birth to live babies, mammal babies drink their mother's milk, mammals have hair*; the main idea could be: *Mammals have several important things in common*.
3. Allow the students to work with a partner to complete key details and main idea for each remaining paragraph. Circulate and provide corrective feedback as needed.
4. Have students share their responses on their graphic organizers with another group, revising their ideas as needed based on the feedback from their peers. Then allow selected students to share their ideas with the whole group. Provide corrective feedback as needed. Ask, "How do the key details support the main idea of each paragraph?"

### **Comparing Articles: Day 4**

1. Provide students with a copy of "Winter's Tail." This article can be found at <http://www.highlightkids.com/audio-story/winters-tail>.  
NOTE: If time permits, you may want to repeat the above activities for close reading with this article, exploring its vocabulary and asking text-dependent questions before identifying key points to compare with "Dolphins."
  - Key vocabulary: *coiled, stump, artificial limbs, determination, inspires*

	<ul style="list-style-type: none"> <li>○ Text-dependent Questions: <ul style="list-style-type: none"> <li>▪ How did Winter become injured? (She swam too close to a crab trap and the line coiled around her tail.)</li> <li>▪ Why did she swim so close to the crab trap? (She was curious.)</li> <li>▪ What happened to Winter's tail? (It fell off.)</li> <li>▪ How did this affect the way she swam? (She began to swim like a shark, moving her body from side to side instead of up and down.)</li> <li>▪ Why was this a problem? (Veterinarians worried that she would injure her spine.)</li> <li>▪ What solution did Kevin Carroll suggest? (He could create an artificial tail for Winter so she could swim like a dolphin.)</li> <li>▪ How has Winter's story affected others? (Others with disabilities are inspired by Winter's determination.)</li> </ul> </li> </ul> <p>2. Provide students with a copy of the Main Idea Graphic Organizer. Allow students to work with a partner to identify the key details and determine the main idea(s) of the text (instead of paragraph by paragraph, have students focus on each section). Circulate and provide corrective feedback as needed. Have students share their responses with another group, revising their ideas as needed based on feedback from peers.</p> <p>3. Ask, "How does comparing and contrasting two texts on the same topic help us better understand both the texts and the topic?" Discuss.</p> <p>4. Provide students with a copy of a Venn diagram (see CPALMS Related Resources for template). Instruct students to work with their partner to complete the Venn diagram, identifying the similarities and differences of the two texts. Remind students to include text evidence in their comparison (they can use their Main Idea Graphic Organizers as well). Circulate and provide corrective feedback as needed. Allow students to share their findings either in whole group or in small groups.</p>
<p><b>5. Formative Assessment</b> List criteria for determining whether students have met each of the learning targets.</p>	<p>At key points throughout the lesson, the teacher will take stock of which students are mastering the content and which students will need additional instruction. At these junctures, the teacher will track students' progress on a formative assessment tracker sheet—which includes a roster of each of the students with boxes indicating those check points. The teacher will highlight the names of students who are in need of additional instruction and designate time for reteaching in small groups either during the same class period or in the next class period, depending on the concept and number of students needing it.</p> <p><i>The aforementioned formative assessment check points include:</i></p> <p><b>At the start of the lesson:</b> Teacher can access the students' prior knowledge of main idea by completing the PowerPoint activity attached.</p>

	<p><b>During the Lesson:</b> Students will answer text-dependent questions and will complete graphic organizers to demonstrate their understanding of the aligned skills and the texts under analysis. The teacher will provide feedback and guidance as needed based on students' responses.</p> <p>Students will be evaluated using the attached <a href="#">rubric</a>. Go over the rubric prior to students' independent writing time to ensure that they understand the expectations. Circulate and provide feedback as needed.</p> <p><b>Teaching Phase:</b> The teacher will provide verbal feedback to students based on students' responses.</p> <p><b>Guided Practice:</b> The teacher will provide verbal feedback on students' responses to questions they answer throughout this lesson. The students can use the teacher's feedback to gain a better understanding of what is expected of them throughout the lesson. The teacher will also provide written feedback on the completed graphic organizers.</p> <p><b>Independent Practice:</b> The teacher will go over the rubric and expectations with students prior to the summative assessment.</p>
<p><b>6. Summative Assessment</b> Describe how students will demonstrate mastery of the Required Standard. Describe the criteria used to determine whether a student has mastered the Required Standard.</p>	<p>Students will produce an original work which examines a topic and conveys ideas and information clearly.</p> <p>Students will be evaluated using the attached informative essay <a href="#">rubric</a>.</p>
<p><b>7. Remediation</b> Describe the processes available to provide support to students that do not meet the learning targets.</p>	<p>Students will be given opportunities throughout the lesson to have checkins with the teacher, allowing time for correcting of misconceptions throughout the lesson. After the lesson, the teacher will use the formative assessment to determine what to reteach for which students in small groups in subsequent lessons.</p> <p>The teacher will also conference with the students at each phase of the writing process, providing remediation and reteaching as needed for the students who have not yet met mastery.</p>

# **Operational Plan**

- **B.1 Applicant Entity**
- **B.2 School Governing Body**
- **B.3 Management and Operation**
- **B.3.1 Education Service Providers**
- **B.3.2 Contracted Services**

**B.1**

# **Applicant Entity**

## **B.1 Applicant Entity**

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*B.1.a 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)*

The applicant group, Somerset Academy, Inc. is a charter holder with two decades of experience and a proven track record of operating, expanding and replicating high quality charter schools. The Somerset Network operates over 55 charter schools serving more than 20,000 students in grades K-12.

Founded in 1997, the first Somerset Academy Charter School opened in Miramar, Florida to humble beginnings. Appropriately named Somerset Neighborhood, the school was housed in a two-room schoolhouse and served 50 students from Kindergarten through 5th grade. To meet parental demand, the school expanded in the years to follow but was careful to maintain a nurturing, tight-knit learning environment and multi-age/multi-level classroom philosophy that parents love, and children thrive in.

Somerset Academy now offers high-quality K-12 educational programs in Florida, Nevada and Texas that have, and continue to, achieve academic success. Although all Somerset Academy schools share a vision, each campus has a unique and enriching educational program that is tailored to the community they serve. This formula, along with incredible support from parents, has made Somerset Academy a nationally recognized, award-winning family of high quality public charter schools.

In 2009, Somerset Academy became the first network of public charter schools in the nation to earn Corporate accreditation from the Southern Association of Colleges and Schools/ AdvancED for its proven commitment to quality and educational excellence. Several Somerset Academy schools have been designated a National Blue Ribbon Schools from the U.S. Department of Education and others have been recognized in the U.S. News and World Report Best High Schools.

This distinction recognizes the myriad of programs Somerset offers to ensure a constant vision and purpose across all campuses. As part of the Somerset accredited system, Somerset Academy of the West Valley will open as an AdvancED accredited program from inception and will uphold the Somerset Academy vision of providing equitable, high-quality education for all students.

In addition, on March 22<sup>nd</sup>, 2017 the Jefferson County, Florida School Board voted to turn over their K-12 programs to the Somerset Academy Charter School Network. This historic vote is a first in Florida, and possibly the nation. State Board of Education Commissioner, Pam Stewart, expressed support for this transition that Somerset Academy is proud to be a part of, "Jefferson children and their right to learn was the driving force behind this decision to work with a charter organization."

All Somerset programs implement the "neighborhood" school paradigm in their management structure to consistently maintain the feeling of a small school environment. The "neighborhood school" philosophy is a common philosophy of student expectations, a unique code of excellence, an expectation of parental commitment, and a collaborative management infrastructure derived from the inception of its first school. Varying from 150 to 2,200 students, all Somerset programs have

implemented the “neighborhood” school paradigm where students receive the support they need to excel and parents feel welcomed and a part of the educational process for their children, faculty and staff are committed to provide differentiated instruction to ensure positive student performance and achievement results and where everyone is accountable for results.

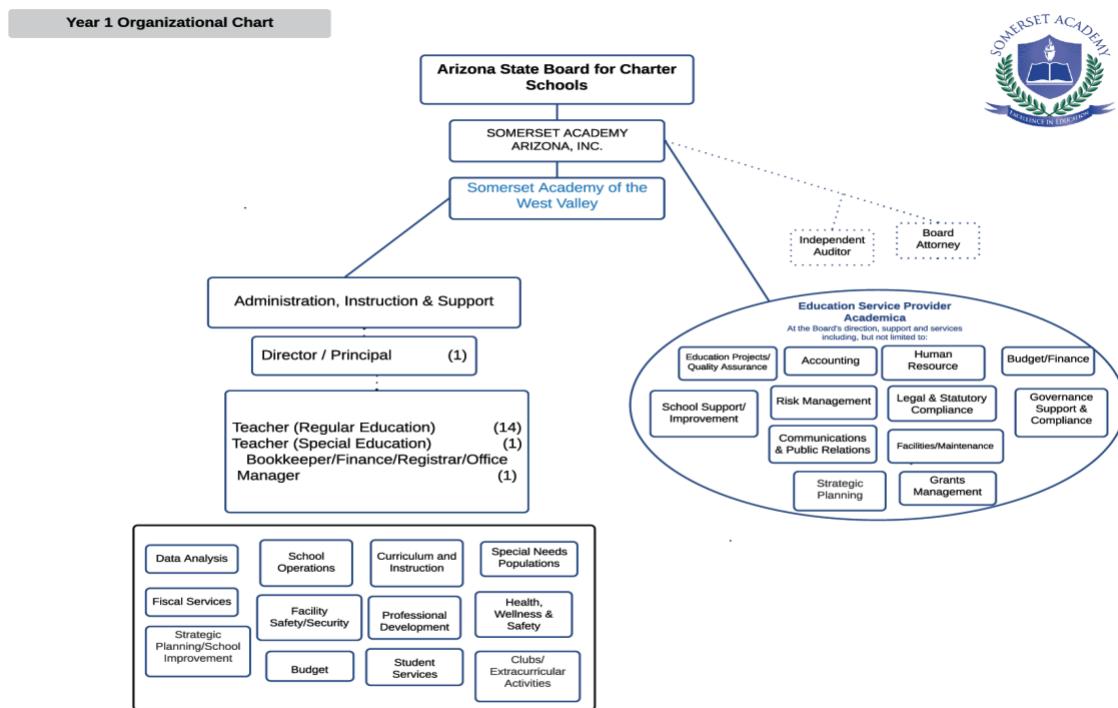
The governing board members of Somerset Academy, Inc. believe that the future of education lies in partnerships between communities, parents, and educators and their commitment to prepare lifelong learners. Somerset Academy, Inc. upholds an educational culture where academic excellence is respected and pursued and caring for others is intrinsic.

Somerset Academy Arizona, Inc. will continue with the core beliefs, visions, and mission set forth for all Somerset schools over twenty years ago. The success of the other Somerset schools will be the backbone to support Somerset Academy of the West Valley in serving the students and families that will attend. Somerset Academy of Arizona will have a unique and enriching educational program that is tailored to their specific students but will uphold the “neighborhood” school paradigm where students and families feel welcomed and supported. As other Somerset schools have proven in the past, this will ensure positive relationships and student success.

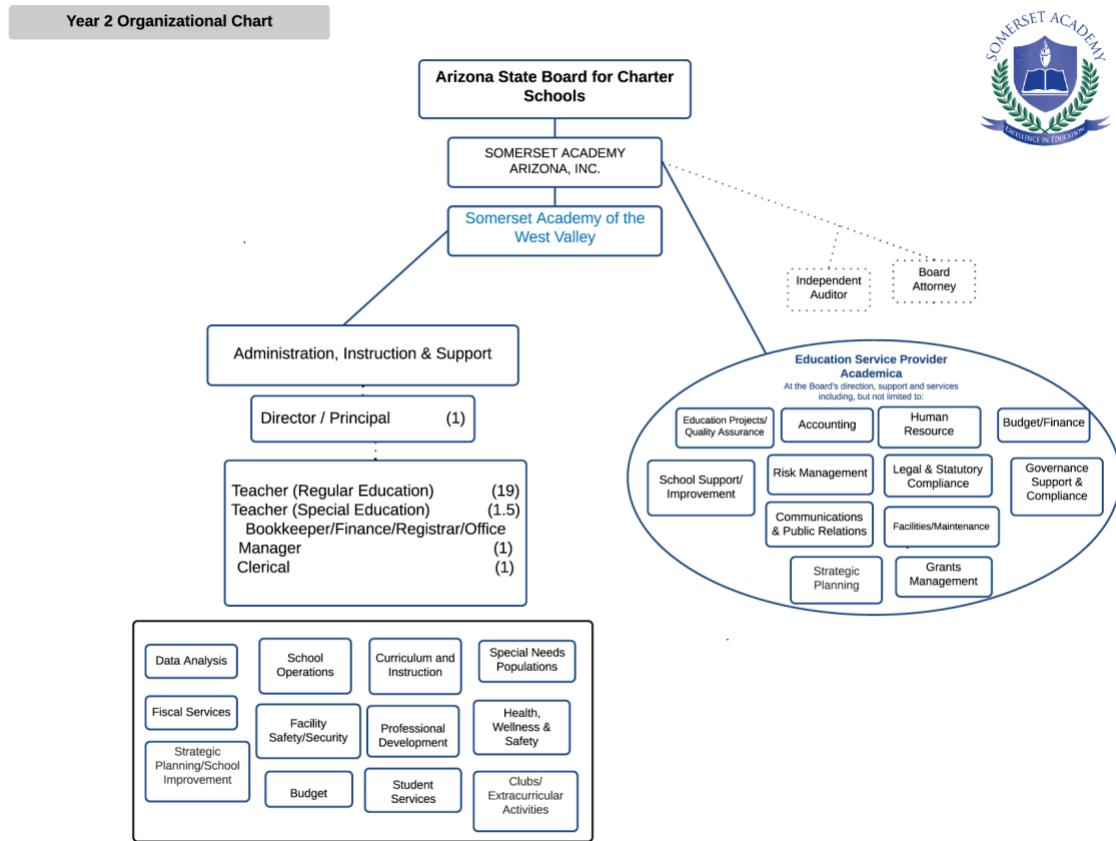
**B.1.b Provide a clear and cohesive organizational chart and narrative that clearly delineates the roles, responsibilities, and reporting structure for each position on the chart. (2 Points)**

Somerset Academy Arizona organizational charts detail the relationships of the Governing Board, School Principal, and all school staff for the first three years of operation.

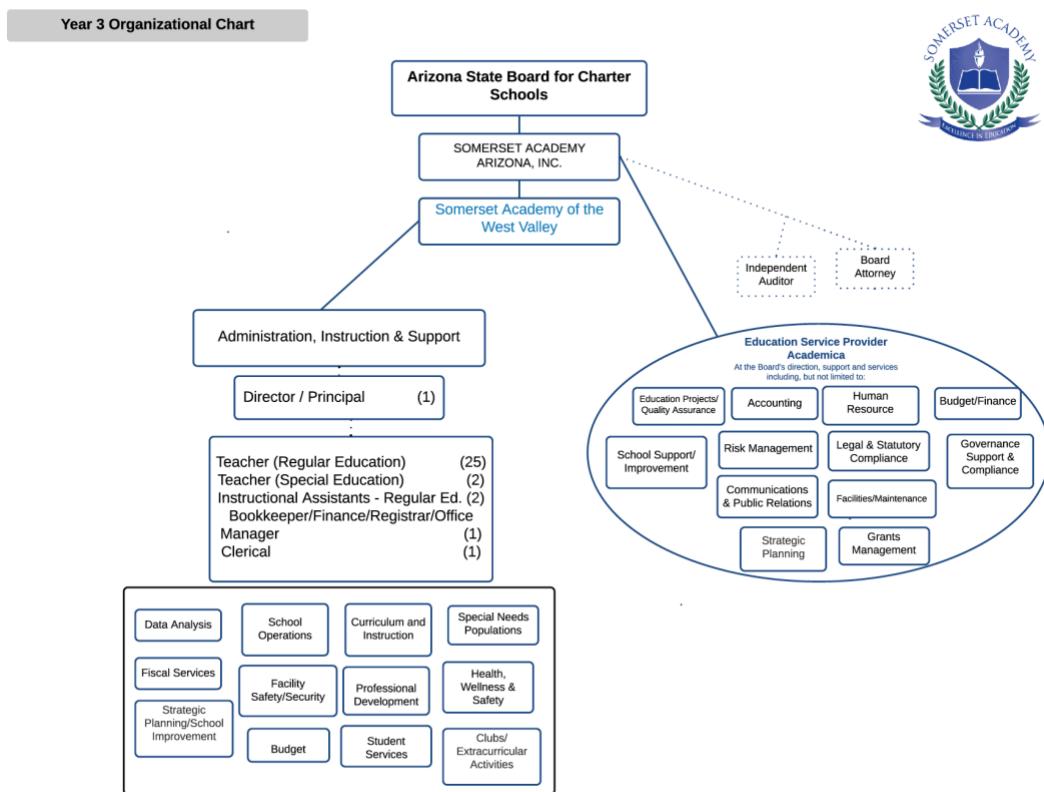
**Figure B.1.1 Year 1 Organizational Chart (expected enrollment 264)**



**Figure B.1.2 – Year 2 Organizational Chart (expected enrollment 374)**



**Figure B.1.3 – Year 3 Organizational Chart (expected enrollment 506)**



The Somerset Academy Arizona Governing Board is the ultimate policy-making body with the responsibility of operation and oversight of the school including but not limited to academic direction, curriculum, and budgetary functions. The school principal, hired by the board, will be responsible for all aspects of school operations within the scope of operating policies and procedures and budgetary functions as adopted and approved by the Governing Board. The school's faculty and staff will report directly to the principal, who shall report to the Governing Board. The board also hires Academica, an **EMO**, as their Educational Support Provider and Academica reports directly to the board.

The governing board of directors (the "Governing Board") will have the responsibility for the activities and affairs of the corporation, including management of the school and for providing continuing oversight of school operations. All corporate powers and functions shall be exercised by the Governing Board. The Governing Board is committed to the mission of the school and is cognizant of its responsibility to effectively and properly manage public funds.

The School's on-site administration (principal, an assistant principal and/or lead teacher) will ensure that the operations of the School (resources, courses, policies) are in accordance with the mission and vision of the School as adopted and approved by the Governing Board. The administrative staff, as instructional leaders, will make all school-based decisions, establishing and

B.1 Applicant Entity - Revised      Somerset Academy Arizona, Inc.      Page 4 of 26

implementing procedures for the day-to-day operations of the School. The faculty and secretarial staff will be responsible for carrying out these procedures in their daily activities and interactions with students, parents and the community.

The following delineates the specific roles, responsibilities, and reporting structure for each position.

### **GOVERNING BOARD**

The policies and procedures by which the board will operate, including specific board member powers are specifically detailed in the attached Bylaws.

A brief overview of those policies and procedures is as follows:

**Board Member Powers:** Subject to the limitations of the Arizona not-for-profit corporation law, the corporation's Articles of Incorporation and Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board shall have the following powers in addition to any other powers enumerated in the Bylaws and permitted by law:

- Select and remove all of the officers, agents and employees of the corporation and prescribe powers and duties for them which are not inconsistent with the law
- To conduct, manage and control the affairs and activities of the corporation
- To adopt, make and use a corporate seal
- To borrow money and incur indebtedness for the purpose of the corporation
- To act as trustee under any trust incidental to the principal object of the corporation, and receive, hold, administer, exchange and expend funds and property subject to such trust
- To acquire by purchase, exchange, lease, gift, devise, bequest or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property
- To assume any obligations, and enter into any contracts or other instruments
- To form and be a member or shareholder of a not-for-profit entity organized under the law of any state
- To carry out such duties as described in the Articles of Incorporation and Charter Contract

**Board Member Duties:** The Governing Board will perform the following duties, as well as any and all other duties specified in Arizona Statutes regarding Governing Boards of Charter Schools and any other duties specified in the Bylaws:

- Oversee operational policies; Academic accountability, and financial accountability.
- Annually adopt and maintain an operating budget.
- Exercise continuing oversight over charter school operations.
- Report its progress annually to its sponsor, which shall forward the report to the Commissioner of Education at the same time as other annual school accountability reports.
- Ensure that the charter school has retained the services of a certified public accountant for the annual financial audit who shall submit the report to the governing body.
- Review and approve the audit report, including audit findings and recommendations
- Monitor a financial recovery plan in order to ensure compliance (if applicable).
- Report progress annually to its sponsor

## **SCHOOL PRINCIPAL**

### **Qualifications:**

- Education: An earned master's Degree (or higher) from an accredited college or university
- Experience Required: A total of five (5) years of school experience is required; which includes a minimum of three (3) years of required experience as a Principal/Assistant School Principal; Valid Arizona Certification in School Principal, or Professional School Principal.

**Reports To:** School Governing Board

**Supervises:** All Administrative, Instructional, and Non-Instructional staff at the school.

**Position Goal:** To provide the leadership and management necessary to administer and implement all programs, activities and policies essential to ensure high quality educational experiences and services for all students in a safe, nurturing, and enriching environment.

### **Essential Performance Responsibilities:**

#### *Leadership*

- Administer, control, and supervise the instructional program of the school operations and school personnel.
- Encourage teachers and pupils to perform to the best of their ability.
- Interpret the educational program of the school and school system to the community.
- Provide leadership and direction for all aspects of the school's operation.
- Facilitate frequent communication with parents of the school community.
- Coordinate and adapt school curricular programs and policies.
- Assume responsibility for the buildings, grounds, equipment and supplies of the school; supervise the work of the custodians and maintenance staff; report to the governing board the conditions and needs of the school.
- Keep accurate account of all money paid to the school and record the purpose for which it was paid.
- Supervise and coordinate the budgetary process.
- Coordinate and conduct the interview process and make hiring and termination decisions for all staff.
- Develop and supervise New Teacher programs.
- Compile and prepare all student achievement outcomes.
- Report directly to the Governing Board for all purposes.
- Coordinate, supervise, and conduct the evaluations of all staff.
- Oversee the School Advisory Council.
- Maintain a positive and productive relationship with the Parent-Teacher Association.
- Supervise all students and staff making sure to maintain the "Somerset Neighborhood" environment/culture of a Somerset school
- Coordinate and supervise the testing and assessment program.
- Enforce the discipline plan and assist teachers with all concerns and issues related to student behavior.
- Serve as final arbitrator for serious discipline problems in accordance with Sponsor and Board's policy and state statutes.
- Establish, actively pursue, and monitor a school mission, vision and goals in collaboration with staff, parents, students, and other stakeholders that are aligned with the Board's mission and goals.
- Supervise and coordinate school-wide programs, curricula and course options.
- Supervise and coordinate student registration, scheduling, and master scheduling construction.
- Oversee the grade reporting system.

- Monitor substitute teachers and the class coverage process.
- Supervise school activities and special events, and initiate fundraising activities.
- Establish business partnerships and positive relationships with community leaders.
- Maintain a master schedule of all school activities and events, including extracurricular trips.
- Coordinate and schedule the use of facilities for all events.
- Implement and enforce attendance and tardy policies and procedures for all students.
- Exercise proactive leadership in promoting the vision and mission of the school.
- Model and maintain high standards of professional conduct.
- Set high standards and expectations for self, others, and school.
- Provide leadership in the implementation of state mandated assessments designed and adapted to measure student achievement.
- Maintain active involvement in the school improvement planning process with the School Advisory Council by providing resources for decision making and priority setting.
- Use quality improvement principles and process in daily administration of school.
- Implement procedures and policies that ensure a safe and orderly learning environment.
- Anticipate difficult situations and develop plans to handle them.
- Manage and administer the development, implementation and assessment of the instructional program at the assigned school so as to ensure student growth and achievement is continuous and appropriate.
- Use collaborative leadership style and quality processes to involve stakeholders in establishing and achieving the school's mission and goals.
- Provide leadership and direction for all aspects of the school's operation.
- Build teams to accomplish plans, goals and priorities.
- Conduct staff meetings to discuss policy changes, instructional programs, potential problems and resolution of existing problems.
- Use appropriate interpersonal styles and methods to guide individuals or groups to task accomplishment.
- Act quickly to stop possible breaches of safety, ineffective procedures, or interference with operations.
- Communicate effectively both orally and in writing with parents, students, teachers and the community.
- Communicate school information, goals, student learning and behavior expectations to stakeholders.
- Develop and maintain a school atmosphere conducive to learning and student achievement.
- Maintain visibility and accessibility on the school campus and at school related activities and events.
- Establish procedures used in the event of school crisis and/or civil disobedience and provide leadership in the event of such incidents.
- Provide leadership to involve the school in quality initiatives.
- Establish procedures for an accreditation program and monitor standards to ensure they are met.
- Provide for the articulation of the school's instructional program among school personnel.
- Use effective communication techniques with students, teachers, parents and stake holders.
- Communicate, through proper channels, to keep Board of Directors informed of impending problems or events of an unusual nature.

*Information & Analysis*

- Address the diverse needs of the school population consistent with the Board's policies and Strategic Plan.

- Use current research, performance data, and feedback from students, teachers, parents and community to make decisions related to improvement of instruction.
- Provide leadership and direction for the implementation and evaluation of curriculum and instruction at the school.
- Analyze and use data for decision-making to improve actions, plans, and processes.
- Access, analyze, interpret and use data in decision-making.
- Use key information such as benchmarks and comparison data in the analysis of results to effectively measure performance.
- Make data accessible to all stakeholders.

*Strategic Planning*

- Develop long and short- term plans and goals within a School Improvement Plan, aligned with the strategic plan of the Board.
- Collaborate and provide resources to ensure the development of a School's Improvement Plan.
- Communicate overall School Improvement Plan requirements to all staff so each employee can understand how the goals and plans relate to his/her work.
- Allocate resources consistent with implementation of a School Improvement Plans.
- Utilize a systematic process for collecting input from stakeholders and incorporates customer requirements in development of School Improvement Plan.
- Establish procedures to monitor processes, activities and responsibilities and respond to feedback.
- Establish and coordinate procedures for student, teacher, parent and community evaluation of curriculum.
- Direct the development of the master schedule and assign teachers according to identified needs.
- Facilitate the horizontal and vertical articulation of curriculum within the school as well as between the school and its feeder system.
- Oversee the selection and acquisition of instructional materials and equipment
- Collect input and analyze data to develop goals.
- Set high goals and standards for self, others and the organization.
- Provide recognition and celebration for student, staff, and school accomplishments.

*Community Engagement*

- Facilitate a program of family and community involvement.
- Develop positive relationships with students, parents, teachers, community.
- Work with parents to resolve complaints or concerns.
- Develop and maintain positive school/community relations and act as liaison between the two.
- Promote/market the school and its priorities to the community.
- Establish processes and methods to respond to valid customer requirements.
- Facilitate, coordinate, and monitor the implementation of Student Education programs and services.
- Implement procedures to ensure that rights of children with disabilities and parents of such children are protected.
- Interact with government and service agencies relative to student welfare.
- Establish processes to determine customer needs and level of satisfaction.
- Establish guidelines for desirable student conduct and follow suspension and expulsion policies and procedures.
- Supervise the implementation of the school's student services plan, including guidance, drop-out prevention, health services, attendance and related areas.
- Take appropriate reporting and/or referral action whenever abuse situations are recognized.

- Provide leadership support for community involvement programs and business partnerships at the school level.
- Direct and develop the recruitment of Business Partners to benefit the school and community.
- Develop activities with business partners that promote student achievement.

*Human Resources*

- Manage appropriately and professionally personnel issues, including hiring, evaluations, staff deficiencies and retention; provides feedback on professional performance and offer assistance to strengthen weaknesses in performance.
- Interview and select qualified personnel.
- Establish job assignments, supervise all assigned personnel, and conduct performance evaluations in accordance with current board policies and legislation.
- Delegate responsibilities to appropriate staff members.
- Make difficult personnel decisions according to policy when necessary including dealing with ineffective teacher or other staff performance.
- Establish and maintain individual professional development plans for each instructional employee that is linked to student achievement.
- Assign tasks and supervise personnel in task accomplishment including special projects.
- Analyze data and information to plan staff development to accomplish school goals.
- Complete annual Needs Assessment to determine staff development needs.
- Lead and manage development of personnel through staff development, in-service and other developmental activities that are linked to student achievement gains and the school improvement plan.
- Facilitate the development and implementation of an effective staff development program.
- Participate, successfully, in the staff development programs offered to increase the individual's skill and proficiency related to the assignment
- Build a school community and environment, which supports learning and growth for everyone toward realization of the school's mission.
- Participate in Governing Board management meetings and other activities to enhance professional development.
- Serve as a coach/mentor to assistant principals or others who are preparing for School Principal certification.
- Review current developments, literature and technical sources of information related to job responsibility.
- Use team approaches in solving problems and improving processes and providing frequent feedback to those involved in improvement efforts.
- Consider data and results from action research when solving problems and improving processes.
- Contribute to positive staff morale through flexibility, support and recognition of groups and individuals working toward school improvement.
- Consider the aspirations of self and others in relation to the jobs and tasks assigned when assessing expertise and developmental needs.

*Operations*

- Manage and supervise the school's financial resources, including the preparation and disbursement of the school's budget and internal accounts.
- Establish and manage student accounting and attendance procedures at the school.
- Coordinate and manage the extracurricular student activities and funds at the school.
- Show positive trends in the achievement of improvement goal results in the areas of Operation, business practices (efficiency) and customer satisfaction.

- Demonstrate readiness and confidence in making and/or sharing decisions with those involved in a timely fashion.
- Employ an improvement cycle for operational problems that analyzes results, identifies root causes and takes corrective action.
- Supervise and monitor the accurate completion of data collection and submit resulting reports according to timelines.
- Coordinate school maintenance and facility needs and monitor progress toward meeting those needs.
- Identify quality requirements of materials/services and communicate this information to parents, community and suppliers.
- Access Sponsor and community resources to meet school needs.
- Coordinate plant safety and facility inspections at the assigned school.
- Monitor the maintenance at the school to ensure a safe, clean, and healthy, learning environment.

## **TEACHER**

### **Qualifications:**

- Education: Bachelor's degree from an accredited college or university; Certifications: valid Arizona certification in the subject area.
- Experience Preferred: Two (2) years of successful classroom experience in the appropriate subject area.

**Reports to:** Principal

**Position Goal:** To create and maintain a classroom atmosphere that generates high expectations and enthusiasm for learning by infusing critical thinking skills, application skills, interpersonal skills, and technology into an aligned curriculum and assessment process, resulting in measurable achievement gains for all students.

### **Skills and Abilities:**

- Possess knowledge of curriculum and state Standards in the appropriate subject area.
- Be able to adapt, design and implement curriculum to meet the needs of the individual students.
- Be able to suggest educational and classroom management strategies, materials and techniques to parents and other support personnel working with students.
- Be able to use observation techniques for identification, ongoing re-evaluation and planning for students.

### **Essential Performance Responsibilities:**

#### *Demonstrate Proficiency*

- Demonstrate mastery of all state competencies.
- Demonstrate knowledge and understanding of the subject matter
- Foster students' achievement gains from baseline assessment levels to be evident in pre/posttest comparison results, standardized test scores, and portfolios
- Assist the administration and staff to develop and implement a school-wide behavior management system aligned to the Board's policies and procedures
- Provide supportive classroom management and academic strategies to teachers, students, and parents.

#### *Demonstrate Proficiency*

- Demonstrate efficiency, punctuality, and consistent attendance
- Review current developments, literature and technical sources of information related to job responsibility.
- Initiate and present innovative ideas for special projects, school functions, field trips, extracurricular activities, and clubs
- Initiate opportunities for professional development

- Provide supplemental instruction.
- Participate in Continued Professional Development*
- Demonstrate oral and written proficiency
  - Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignments
  - Pursue further education and supplemental credentials.

*Employ variety of educational technologies, strategies & teaching styles*

- Employ differentiated instructional strategies to maximize learning.
  - Consistently maintain portfolios (dating and ordering each piece).
- Serve as role models for students and future teachers*
- Role model using the state competency checklist.
  - Promote problem-solving skills and character education.
  - Promote and enforce school rules.

*Advise parents*

- Keep parents updated through interim reports, report cards, phone calls, and notes home.
- Encourage and facilitate parental and community involvement promoting student achievement.
- Document parent phone calls, conversations, and conferences
- Work as partners to create behavior modification plans and create Progress Monitoring Plans (PMP) for students.
- Maintain flexibility and frequent contact with parents about student progress and school events.

*Demonstrate awareness of each student's educational needs*

- Continually assess students' development through clearly defined rubrics.
- Establish, maintain, assess, and (if needed) modify individual student progression plans.
- Identify those students who exhibit exceptional thinking styles and behaviors and implement and/or accommodate those exceptional needs.
- Assist in data collection and preparation of reports including individualized educational plans of instruction for students.

*Work cooperatively and productively with co-workers*

- Interact with maturity and professionalism among administration, staff, and students at all times.
- Take initiative to implement projects, programs, and/or compensate for shortcomings within classroom and/or the school environment.
- Exhibit congeniality among co-workers, students, and parents.
- Show assertiveness - delegate when necessary.
- Be a team player while respecting others differences.
- Separate professional and personal spheres.
- Be flexible - always have a back-up plan.
- Be willing to help where help is needed.

*Follow guidelines regarding safety and education*

- Supervise student recreation (having at least one person in the classroom at all times).
- Complete and maintain accident reports (keeping one in a permanent file and sending one copy to parents).
- Keep emergency numbers at hand and a stocked first aid kit accessible in classroom.
- Maintain up-to-date lesson plans within curriculum guidelines.
- Complete, distribute, and maintain files of all behavior and homework referrals as required (one in permanent folder, one sent home).
- Complete and maintain files of all report cards, interim reports, and county test records,
- Follow safety requirements regarding aisles, doorways, fire alarms, and fire extinguishers at all times.
- Participate in monthly fire and other safety drills.

- Keep dangerous objects (knives, rocks, etc.) and toxic substances (ammonias, medicines, etc.) out of the reach of children at all times.
- Follow appropriate County medication guidelines for all students (remember never to give Tylenol, cough drops, or any prescription medications without the written consent of the parent and administrator and accompanied by the appropriate medical forms).

*Participate actively in school functions*

- Attend parent/teacher meetings and conferences.
- Plan and participate in special events.
- Perform other duties as assigned by the Principal.

### **EXCEPTIONAL STUDENT EDUCATION SPECIALIST/TEACHER**

#### **Qualifications:**

- Education: An earned bachelor's Degree (or higher) from an accredited college or university and a certification in Exceptional Student Education areas.
- Experience Required: A total of five (5) years of successful instructional experience in Exceptional Student Education

**Supervises:** Teachers and clerical personnel, as assigned.

**Position Goal:** Conduct staff development activities designed to ensure a free and appropriate public education for all students with disabilities. This position will also assist the School Administrator in managing all ESE functions within the school and will ensure compliance in all areas of ESE.

#### **Essential Performance Responsibilities:**

- Coordinates the referral, staffing, placement and re-evaluation process for exceptional student education at the school level, i.e., initials, IEP reviews, transfers, verification of placements
- Directs the use of all forms at the school level including referral and placement forms, IEP's, data entry, FTE, etc., in preparation for staffing's/meetings
- Maintains records and procedures specific to Exceptional Student Education for compliance purposes
- Serves as LEA (Local Education Agency) Representative at the Speech and Language staffing's and IEP meetings
- Acts as a resource to the school personnel regarding ESE rules, regulations, compliance requirements, program needs, school responsibilities, positive behavioral supports, discipline concerns, functional behavior assessments, behavior intervention plans, and other ESE related concerns including implementation of Individuals with Disabilities Education Act
- Assists schools in implementing all processes required for the FTE survey weeks and the federal count
- Provides periodic monitoring of Matrices, IEPs, re-evaluation dates and any other date specific requirements to ensure compliance for audit surveys
- Collaborates with school personnel and others for the development, coordination and implementation of appropriate staff development, e.g., workshops, updates, in-service, conferences, etc.
- Monitors the extent to which students' educational goals are being met in accordance with those outlined in the student's IEP.
- Prepares and submits appropriate comprehensive written reports that include interpretation and synthesis of assessment data and other sources data upon request.
- Assesses the needs of school-based ESE teachers and programs.
- Mentors and demonstrates effective teaching strategies to ESE teachers.
- Assists schools in the decision-making process required for determining accommodations for students with disabilities participating in standard or alternative assessment.

- Serves as liaison between school personnel, i.e., the guidance department, the administrators and the ESE staff.
- Develops and implements activities promoting inclusive practices.
- Attends workshops, conferences and meetings necessary to maintain and update professional knowledge.
- Provides services and assistance to special education students based on the students' IEPs.

### **REGISTRAR/ OFFICE MANAGER / RECEPTIONIST**

#### **Qualifications:**

- Education: Standard high school diploma or satisfactory completion of an approved General Educational Development (GED) Program.
- Skills: A well-rounded knowledge of clerical methods, procedures, and business office practice; must be computer literate. Computer skills as required for the position. The hiring administrator may specify preferred, appropriate additional qualifications as may be related to the job.
- Experience: One (1) year of previous school-work experience which demonstrated an expertise to perform various procedures and applications of a repetitive and routine nature following standard practices.

**Reports to:** Administrator/ Principal designee

**Position Goal:** To perform a wide variety of clerical duties with respect to registering students, processing and maintaining student records, and otherwise working with student schedules and data in a responsible and accurate manner.

#### **Essential Performance Responsibilities:**

- Process required forms and information to enroll new students and discuss the process with students and parents.
- Maintain cumulative folders and permanent record cards in a secure manner.
- Prepare various lists and reports in regard to student ranking, grade averages, graduation, reassignments, etc.
- Process withdrawal and transfer of students and verify that student obligations are settled.
- Receive and mail transcripts and other requested records, as authorized, and prepare related correspondence.
- Follow instructions and established policies and procedures to perform specialized registrar duties referring questionable matters to the Guidance Director or Administrator.
- Review students' immunization forms to verify adherence to governmental requirements.
- Operate standard office equipment such as any generation of computer, calculator, word processor, etc., as well as equipment developed or advanced from future technology as required by the job.
- Answer phones and assist parents with questions directing specific questions to the appropriate departments/person when necessary.
- Interact effectively with the general public, staff members, students, teachers, parents, and administrators, using tact and good judgment.
- Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment.
- Review current developments, literature and technical sources of information related to job responsibility.
- Ensure adherence to good safety procedures.
- Perform other duties as assigned by the Principal or designee.

### **INSTRUCTIONAL ASSISTANTS/ PARAPROFESSIONAL**

**Qualifications:**

- Education: A College Associates Degree
- Experience: Experience in working with age appropriate children preferred.

**Reports to:** Supervising Teacher, Principal designee

**Position Goal:** To assist, support and work closely with teachers, administrators, and other team members in providing a quality instructional program for students.

**Essential Performance Responsibilities:**

- Relate and work with students and adults in a positive manner.
- Work cooperatively with colleagues.
- Follow written and verbal instructions.
- Perform clerical tasks.
- Maintain flexibility and confidentiality.
- Demonstrate effective oral and written communication skills, basic English and mathematics skills, basic knowledge of technology and ability to apply knowledge to assigned areas of responsibility, and knowledge of operation of office and audio-visual equipment.
- Observe assigned work hours.
- Maintain a pattern of prompt and regular attendance.
- Follow the daily schedule as prescribed.
- Adjust to work assignments and/or schedule changes.
- Work with individual students or small groups of students to reinforce learning of materials or skills initially introduced and outlined by the teacher.
- Provide extra assistance to students with special needs, such as non-English-speaking students or those with physical and/or mental disabilities.
- Assist as directed by the teacher in the effort to successfully maintain students with special needs in an integrated setting, as determined by the IEP team.
- Assist the teacher in preparing materials and equipment for direct instructional activity, including locating, copying, collating, distributing and/or grouping materials to support instructional activities planned by the teacher.
- Assist with bulletin boards and decorations for instructional purposes and for special events.
- Supervise students in classrooms, halls, cafeterias, school yards, and gymnasiums, or on field trips.
- Perform assigned non-instructional classroom duties, such as snack time, toileting, and clothing routines.
- Serve as a source of information and help to any substitute teacher assigned to the class.
- Attend staff meetings, and serves on committees as required.
- Perform other duties as assigned by the teacher, principal, or designee.
- Demonstrate ethical behavior and confidentiality of information about students in school environment and community.
- Maintain a cooperative working relationship with principal, supervising teacher, students, parents, staff, and public.
- Participate in professional learning activities which align with school improvement goals.
- Participate in staff development opportunities provided by the county.

**Clerical****Qualifications:**

**Education:** Standard high school diploma or satisfactory completion of an approved General Educational Development (GED) Testing Program. Vocational or business school Secretarial Science training preferred

**Preferred:** Proficiency in shorthand. Bilingual skills. Extensive knowledge of business practices, policies, and procedures; ability to handle a variety of tasks simultaneously; good organizational skills, public relation skills, ability to take dictation and an excellent command of English grammar. The hiring administrator may specify preferred, appropriate additional qualifications as may be related to the job.

**Experience:** Three years of related secretarial experience.

**Reports to:** Principal or Immediate supervisor

**Position Goal:** To provide a wide variety of skilled secretarial services involving good judgment to assist supervisory personnel of routine office procedures.

#### **Essential Performance Responsibilities:**

Clerical shall:

- Follow instructions to perform advanced secretarial/clerical duties
- Screen callers, set up appointments, arrange meetings, and disseminate requested information appropriately
- Take dictation, attend meetings, type all correspondence, articles, reports, manuals, and workshop materials
- Assist in the preparation of the department budget and draft correspondence in response to inquiries
- Prepare, examine and verify statistical and confidential reports for completeness and accuracy of computation; determine conformity to established requirements and personally verify that any discrepancies are eliminated
- Maintain and update all case files of employees in the Employee Assistance Program, files of general correspondence and business documents, and treatment resource files.
- Open, date, and distribute all mail, memorandums, etc
- Exercise responsibility, discretion and independent judgment in resolving office problems relating to EAP client behavior
- Meet and deal effectively with the general public, staff members, supervisory personnel, clients, agencies and/or mental health practitioners, using tact and good judgement
- Operate standard office equipment such as any generation of typewriter, calculator, CRT terminal, microcomputer, word processor, duplicator, etc., as well as equipment developed or advanced from future technology
- Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment
- Review current developments, literature and technical sources of information related to job responsibility
- Ensure adherence to good safety procedures
- Perform other duties assigned by the administrator

B.1.c Clearly describe any subsidiary relationship of the Applicant entity to another organization.(1 point)

All powers of the Corporation shall be exercised by and under the authority of the Governing Board of Somerset Academy Arizona, Inc., and the property, business, and affairs of the Corporation shall be managed under the Governing Board's direction. The Governing Board is the ultimate policy-making body for the school, and will have the responsibility for the affairs and management of the

school. The Governing Board will provide continuing oversight of school operations, including a responsibility to effectively and properly manage school funds.

Pursuant to the Articles of Incorporation, Somerset Academy, Inc., a Florida non--profit corporation. Somerset Academy Inc, the parent organization, is the sole member of Somerset Academy Arizona, Inc. Somerset Academy, Inc. is a Florida non--profit and 501(c)(3) federal tax--exempt organization that provides support to all schools in the Somerset network. As the parent organization, The Somerset Academy, Inc. retains specified corporate functions, as detailed in the Articles of Incorporation, which include: issuing new or additional membership interests; any corporate merger, consolidation, dissolution, or liquidation; any amendment to the Articles of Incorporation or bylaws; appointment of directors and/or designation of officers; financing; inability to pay debts, insolvency, or corporate bankruptcy.

B.1.d Identify any current or prior charter operation by the Applicant and any Principal, including the authorizer, timeframe, and nature of involvement.

*Current & Prior Charter Operation*

Schools Operated by Somerset Academy, Inc.				
School Name	Grades Served*	Authorizer	Years of Operation	Nature of Involvement
Somerset Academy (Miami-Dade)	K-5	Miami-Dade Public Schools	2004-	Charter Holder
Somerset Academy Charter Middle School	6-8	Miami-Dade Public Schools	2004-	Charter Holder
Somerset Academy (Silver Palms)	K-8	Miami-Dade Public Schools	2007-	Charter Holder
Somerset Academy Charter High School	9-12	Miami-Dade Public Schools	2004-	Charter Holder
Somerset Academy Silver Palms at Princeton	K-8	Miami-Dade Public Schools	2011-	Charter Holder

Somerset Arts Academy	K-8	Miami-Dade Public Schools	2008-	Charter Holder
Somerset Oaks Academy	K-8	Miami-Dade Public Schools	2011-	Charter Holder
Somerset Academy Elementary School (South Miami Campus)	K-5	Miami-Dade Public Schools	2009-	Charter Holder
Somerset Academy Middle School (South Miami Campus)	6-8	Miami-Dade Public Schools	2008-	Charter Holder
Somerset Academy Charter Elementary School (South Homestead)	K-5	Miami-Dade Public Schools	2008-	Charter Holder
Somerset Academy Charter Middle School (South Homestead)	6-8	Miami-Dade Public School	2008-	Charter Holder
Somerset Academy Charter High School (South Homestead)	9-12	Miami-Dade Public Schools	2011-	Charter Holder
Somerset Gables Academy	K-8	Miami-Dade Public Schools	2010-	Charter Holder
Somerset Academy Bay	K-5	Miami-Dade Public Schools	2013-	Charter Holder
Somerset Academy Bay Middle School	6-8	Miami-Dade Public Schools	2013-	Charter Holder
Somerset Preparatory Academy Sunset	K-5	Miami-Dade Public Schools	2015-	Charter Holder
Somerset Palms Academy	K-5	Miami-Dade Public Schools	2018-	Charter Holder
Somerset Academy Kendall	K-5	Miami-Dade Public Schools	2018-	Charter Holder
Somerset Academy Virtual Middle High School	6-12	Miami-Dade Public Schools	2014-	Charter Holder
Somerset Academy	K-5	Broward County Public School	2000-	Charter Holder

Somerset Academy Middle School	6-8	Broward County Public School	2000-	Charter Holder
Somerset Academy High School	9-12	Broward County Public School	2002-	Charter Holder
Somerset Arts Conservatory	9-12	Broward County Public School	2006-	Charter Holder
Somerset Academy South	K-5	Broward County Public School	2018-	Charter Holder
Somerset Academy (Miramar Campus)	K-5	Broward County Public School	2006-	Charter Holder
Somerset Academy Middle School (Miramar Campus)	6-8	Broward County Public School	2006-	Charter Holder
Somerset Academy Miramar South	K-5	Broward County Public School	2012-	Charter Holder
Somerset Academy (Davie)	K-5	Broward County Public School	2003-	Charter Holder
Somerset Academy East Preparatory	K-5	Broward County Public School	2009-	Charter Holder
Somerset Academy Village	K-5	Broward County Public School	2010-	Charter Holder
Somerset Academy Village Charter Middle School	6-8	Broward County Public School	2010-	Charter Holder
Somerset Preparatory Academy Charter School at North Lauderdale	K-8	Broward County Public School	2010-	Charter Holder

Somerset Preparatory Academy Charter High School at North Lauderdale	9-12	Broward County Public School	2010-	Charter Holder
Somerset Academy Neighborhood School	K-5	Broward County Public School	1997-	Charter Holder
Somerset Preparatory Academy Charter Middle School	6-8	Broward County Public School	2010-	Charter Holder
Somerset Academy Charter High School (Miramar Campus)	9-12	Broward County Public School	2011-	Charter Holder
Somerset Pines Academy	K-8	Broward County Public School	2010-	Charter Holder
Somerset Academy Pompano	K-5	Broward County Public School	2012-	Charter Holder
Somerset Academy Key Charter Middle School	6-8	Broward County Public School	2013-	Charter Holder
Somerset Academy Key Charter High School	9-12	Broward County Public School	2016-	Charter Holder
Somerset Academy Riverside Charter School	K-5	Broward County Public School	2013-	Charter Holder
Somerset Academy Riverside Charter Middle School	6-8	Broward County Public School	2013	Charter Holder
Somerset Academy Boca	K-5	Palm Beach County Public Schools	2012-	Charter Holder
Somerset Academy Boca Middle	6-8	Palm Beach County Public Schools	2013-	Charter Holder

Somerset Academy Canyons Middle School	6-8	Palm Beach County Public Schools	2013-	Charter Holder
Somerset Academy Canyons High School	9-12	Palm Beach County Public Schools	2013-	Charter Holder
Somerset Academy Lakes Charter School	K-5	Palm Beach County Public Schools	2016-	Charter Holder
Somerset Academy JFK	K-8	Palm Beach County Public Schools	2007-	Charter Holder
Somerset College Preparatory Academy	6-12	St. Lucie County Public Schools	2012-	Charter Holder
Somerset Academy St. Lucie	K-5	St. Lucie County Public Schools	2009-	Charter Holder
Somerset Academy (Eagle Campus)	K-5	Duval County Public Schools	2010-	Charter Holder
Somerset Preparatory Academy	K-8	Duval County Public Schools	2013-	Charter Holder
Somerset Academy Charter Middle School (Eagle Campus)	6-8	Duval County Public Schools	2010-	Charter Holder
Jefferson County Elementary A Somerset Charter School	K-5	Jefferson County Public Schools	2017-	Charter Holder
Jefferson County Middle A Somerset Academy Charter School	6-8	Jefferson County Public Schools	2017-	Charter Holder
Jefferson County High A Somerset Academy Charter School	9-12	Jefferson County Public Schools	2017-	Charter Holder

Key West Collegiate School	9-12	Monroe County Public Schools	2011-	Charter Holder
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Schools Operated by Principals of Somerset Academy Arizona, Inc.				
School Name	Grades Served*	Authorizer	Years of Operation*	Nature of Involvement
Mater East Academy	K-5	Miami-Dade Public Schools	2002-2006	Assistant School Leader-Lourdes Isla Marrero
Mater Gardens Academy	K-5	Miami-Dade Public Schools	2006-2018	School Leader-Lourdes Isla Marrero
Mater Gardens Academy Middle School	6-8	Miami-Dade Public Schools	2006-2018	School Leader-Lourdes Isla Marrero
Pinecrest Academy South Campus	K-5	Miami-Dade Public Schools	2006-2014	Assistant School Leader- Ana Diaz
Pinecrest Preparatory Academy Charter School	K-5	Miami-Dade Public Schools	2014-	School Leader- Ana Diaz

\* Years of operation is the time that the principal worked at that institution under the position under nature of involvement. All schools listed are currently under operation.

B.1.e 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

## *Role of each Principal*

Lourdes Isla Marrero, Todd German, Ana Diaz, and Taylor Smith of Arizona will serve as Governing Board members of Somerset Academy Arizona, Inc. and each board member will also be Authorized Representatives. As stated in the bylaws and Articles of Incorporation, the initial Board for consisted of 5 members. Once established a member resigned, reflected in the annual filing. At 4 board members, the board meets the minimum number of board members as described in the Bylaws of 3 members. Below are the biographies for each principal and how they will support the Educational Plan, Operation Plan, and/or Business Plan.

### **Lourdes Isla Marrero**

Lourdes Isla-Marrero began her career in 1999 at Mater Academy East Charter School, in the Little-Havana area in Miami, Florida. For 3 years she taught kindergarteners how to read, write and do math. During her 3rd year she was promoted to Lead teacher and was handed the task of liaison between the National School Lunch Program and Mater Academy, Inc. which at the time had 5 schools under its umbrella. The following two year she was Assistant Principal at the same school. In 2006, she was promoted to be the Principal of Mater Gardens Academy K-8 School. She opened the school with an estimated 400 students K-6th grade and slowly grew it to the successful school it is currently. In 2014, the school was nominated and won a Blue Ribbon Award from the Dept. of Education for obtaining academic excellence. In 2018, Ms. Isla was promoted to Dean of the Bachelors of Science Program at Doral College. She is currently working on having the program approved by the FLDOE and DEAC. In the meantime, she is still the liaison for the NSLP and Mater Academy, Inc. which currently manages 25 schools and she has been a Somerset Board member/chair for the past 10 years. This experience in running educational institutions and serving on governing boards gives Lourdes the experience to provide educational oversight for the school.

### **Todd German**

Mr. German is an Investment Advisor and partner in Keys Wealth Management, a private investment management firm. He has served as senior officer for a number of local financial institutions. Most recently, in addition to serving as board member and Treasurer of the Somerset board, Todd is the President of the Key West Collegiate School, Chairman of Hometown PAC, and member of the Key West Citizen Editorial Board. His past volunteer time was spent as the President of the Key West Business Guild, Vice Chair of the Community Foundation, President of the Montessori Charter Elementary School, Chair of the Key West Citizen's Review Board, and former President of the Key West Botanical Garden Society. Todd is a graduate of Leadership--Monroe County, the Key West Ambassador Program and the Key West Citizen's Police Academy. He holds memberships in all the associations promoting business in Key West--the Attractions, Lodging, Innkeeper's and Realtor's Associations. Mr. German brings financial, real estate and charter school governance experience.

### **Ana Diaz**

Ms. Diaz has been in the field of education for over fifteen years. She earned her Master's Degree in Elementary Education from the University of Florida and began her career as a teacher in the Miami-Dade County Public School System. Ms. Diaz continued her studies at Nova Southeastern University where she completed her certification in Educational Leadership. In the fall of 2005, Ms. Diaz began working with Charter Schools and she serves as the Principal of Pinecrest Preparatory Academy Charter School. In addition to supervising the daily school operations, her areas of expertise include curriculum planning, program evaluation, data analysis, assessment design and

professional development. Ms. Diaz has effectively provided oversight and support in her areas of expertise for several of the Somerset schools

**Taylor Smith**

Taylor Smith is the President and founder of Project Finance & Development Inc. (PFDI) which specializes in charter school site location and development. PFDI has worked with various charter school networks and stakeholders and has established all of the Florida Educational Facilities Benefit Districts currently in existence. Together with its affiliated companies, PFDI has financed and developed charter schools, school concurrency projects, public roads, residential developments, mixed-use projects, parking garages, and mixed-use office/retail projects. The projects and tax-exempt financings total over \$960,000,000. In addition, Mr. Smith served on Florida's founding Charter School Review Panel as well as the Florida Greenways Commission. Mr. Smith provides a vast knowledge of charter schools and the importance of charter schools and their service to the community.

**BYLAWS OF**  
**SOMERSET ACADEMY ARIZONA, INC.**

A Arizona Not-For-Profit Corporation

Dated as of June \_\_, 2018

**BYLAWS OF  
SOMERSET ACADEMY ARIZONA, INC.**

**A Arizona Not for Profit Corporation**

**ARTICLE I  
PURPOSE AND RESTRICTIONS**

**1.1      Purpose.**

(a)     Somerset Academy Arizona, Inc. (the "Corporation") is not-for-profit and is organized and shall be operated exclusively for educational purposes as described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended or the corresponding provision of any future United States Internal Revenue Law (the "Code"), including specifically the organization and operation of charter schools.

(b)     The Corporation admits students of any race, color, national, and ethnic origin to all rights, privileges, programs, and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admissions policies, scholarship, and loan programs, and athletic and other school-administered programs.

**1.2      Restrictions.**

(a)     No part of the earnings of the Corporation shall inure to the benefit of any director or officer of the Corporation, or to any other person (except that the Corporation may pay reasonable compensation for services rendered to or on behalf of the Corporation and make other payments and distributions in furtherance of one or more of its purposes), and no director or officer of the Corporation, or any other person shall be entitled to share in the distribution of any of the corporate assets on dissolution of the Corporation. The Corporation shall pay no dividends.

(b)     The Corporation shall not participate, directly or indirectly, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. The Corporation shall not attempt to influence legislation by propaganda or otherwise. The Corporation shall not have the objectives nor engage in activities that would characterize it as an "action organization" as defined in Treasury Regulations.

(c)     Notwithstanding any other provision of these articles, the Corporation shall not carry on any activities not permitted to be carried on by an organization exempt from Federal income tax under Section 501(c)(3) of the Code.

(d)     Upon the dissolution of the Corporation, the Board of Directors will, after paying or making provision for the payment of all the liabilities of the Corporation, dispose of all the assets of the Corporation exclusively to Somerset Academy, Inc., provided that at

the time of such distribution Somerset Academy Arizona, Inc. is a not for profit corporation or trust described in Section 509(a)(1) or 509(a)(2) of the Code (an "Eligible Distributee"). In the event that Somerset Academy Arizona, Inc. is not an Eligible Distributee, upon the dissolution of the Corporation, the Board of Directors will, after paying or making provision for the payment of all the liabilities of the Corporation, dispose of all the assets of the Corporation exclusively to not for profit corporations or trusts described in Section 509(a)(1) or 509(a)(2) of the Code which are organized and operated to support education in Arizona, including specifically the support and operation of charter schools.

## **ARTICLE II** **MEMBERS**

2.3        **Membership.** The Corporation shall have one (1) member (the "Member") which shall be Somerset Academy, Inc., a Florida not-for-profit corporation.

2.4        **Action by the Member.** The Member shall have the right to vote only with respect to those actions and issues specifically described in these Bylaws as requiring a vote of the Member. Any action of the Member shall be taken by a written consent signed by the Member.

2.5        **Member Vote Required.** Notwithstanding anything herein to the contrary, the actions enumerated below must be approved by the Member by formal resolution of the Member's board of directors:

- (a)      The issuance of new or additional membership interests;
- (b)      Any merger or consolidation of the Corporation with or into any other entity, or of any other entity with or into the Corporation;
- (c)      Any amendment to the Articles of Incorporation or the Bylaws of the Corporation;
- (d)      The dissolution or liquidation of the Corporation;
- (e)a     The compensation to be paid to committee members, the President, or any other officers;
- (f)      The appointment of Directors or the nomination of prospective Directors;
- (g)      The designation of Officers;
- (h)      The acquisition of any financing, including the approval of the amount of the financing, the security for such financing and all other terms of the financing, and the direct or indirect borrowing of money, whether secured or unsecured, the refinancing, extending or modifying in any material manner of any loan or delivering any guaranty of any loan or other obligation; and

(i) Admitting in writing the Corporation's inability to pay its debts generally; authorizing a general assignment by the Corporation for the benefit of creditors; the filing of any petition or answer by the Corporation seeking to adjudicate it a bankrupt or insolvent; seeking for itself any liquidation, winding up, reorganization, arrangement, adjustment, protection, relief, or composition of the Corporation or its debts under any law relating to bankruptcy, insolvency or reorganization or relief of debtors; seeking, consenting to, or acquiescing in the entry of an order for relief or the appointment of a receiver, trustee, custodian, or other similar official for the Corporation or for any substantial part of its property; or company action taken by the Corporation to authorize any of the actions set forth above.

## **ARTICLE III** **DIRECTORS**

3.1 Management of the Corporation. Except as otherwise set forth in Article II, all powers of the Corporation shall be exercised by and under the authority of the Board of Directors (the "Board"), and the property, business, and affairs of the Corporation shall be managed under the Board's direction. Except as specifically set forth to the contrary herein, the Board may not take any action, except upon the approval thereof by the affirmative vote of a majority of the Board members during a meeting at which a quorum is attained.

3.2 Number of Directors. The initial Board shall consist of five (5) Directors named in the Articles of Incorporation. The number of Directors may at any time be increased or decreased to no more than nine (9) and no fewer than three (3) by a majority vote of the Board. In the event of an increase in the number of Directors, the additional directorships created shall be filled in a manner proscribed herein for the election of Directors in accordance with Section 3.3.

3.3 Election of Directors. The Directors of the Corporation shall be elected by the Member and shall serve for a term determined by the Member.

3.4 Removal of Directors. Any member of the Board may be removed from office with or without cause. Any vacancies created by the removal of a Director in accordance with this Section 3.4 shall be filled in accordance with the provisions of Section 3.6.

3.5 Resignation of Directors. A Director may resign at any time by delivering written notice to the Board. A resignation is made effective when notice is delivered unless the notice specifies a later effective date. If a resignation is made effective at a later date, the Board may fill the pending vacancy before the effective date, in accordance with the provisions of Section 3.6, if the Board provides that the successor does not take office until the effective date. No reduction of the authorized number of Directors shall have the effect of removing any Director before that Director's term of office expires.

3.6 Vacancies on Board. Whenever any vacancies shall occur on the Board by death, resignation, or removal, such vacancy on the Board may be filled.

3.7 Annual Meeting. An annual meeting of the Board shall be held during June of each year at the time and place designated by the Board for the purpose of transacting such

business as may come before the Board. The President of the Corporation shall preside at the annual meeting of the Directors.

3.8 **Regular Meetings.** In addition to the annual meeting, the Board may hold other regular meetings at such times as shall be fixed by the Board. The Board may publish a schedule of regular meetings to be held during the course of the ensuing year, and shall notice all regular meetings as prescribed in Section 3.11. The President of the Corporation shall preside at any regular meeting of the Directors.

3.9 **Special Meetings.** Special meetings of the Board may be called by the President of the Corporation. Further, special meetings of the Board must be called by the President within fourteen (14) days of receipt of a written request of any two (2) or more Directors. The President may designate any place as the place for holding any special meeting of the Board called by them. If no designation is made, the place of meeting shall be the principal office of the Corporation. All special meetings shall be noticed as prescribed in Section 3.9. The President of the Corporation shall preside at any special meeting of the Directors.

3.10 **Notice of Meetings.** Notice of all meetings shall be given before the time of the holding of the meeting in accordance with applicable law, rules, and regulations. Notice in each case shall specify the place, day and hour of the meeting, and in the case of a special meeting, the purpose or purposes of the special meeting, provided that these Bylaws may be neither amended nor repealed nor may new Bylaws be adopted at any meeting unless the notice of such meeting shall contain a description of the proposed changes. Notice shall be given by the Secretary, or the Secretary's designee, or in his or her absence or upon his or her failure to act, by an officer designated by the Chairperson of the Board or the President. Notwithstanding the aforementioned, notice of all meetings shall be in accordance with [A.R.S. Title 38, Chapter 3, Article 3.1.](#), as applicable.

3.11 **Quorum.** Fifty percent (50%) of the Directors then-in-office plus one (1) of the Directors then-in-office shall constitute a quorum for the transaction of business. Except as otherwise provided by law, the Articles of Incorporation, or these Bylaws, the affirmative vote of at least a majority of the Directors participating in a meeting at which quorum is attained shall be necessary for an action of the Board.

3.12 **Adjournment.** Once quorum has been attained and a meeting of the Board commenced, a majority of the Directors may adjourn such meeting to another time and place.

**Notice of Adjournment.** Notice of the time and place of any such adjourned meeting shall be given before the time of the adjourned meeting, in the manner specified in Section 3.11 of this Article, and in compliance with [A.R.S. Title 38, Chapter 3, Article 3.1.](#).

3.13 **Fees and Compensation of Directors.** Each Director may be paid or reimbursed for his or her actual out-of-pocket expenses, if any, including for attendance at each meeting of the Board and a committee thereof, but shall not receive any compensation, directly or indirectly, from charter school's operations or as otherwise may be prohibited by applicable law or the terms of any charter school charter.

## **ARTICLE IV** **COMMITTEES**

4.1 **Committees of the Board.** The Board may, by resolution, establish standing committees and special committees of the Board. Unless otherwise specified by resolution of the Board or these Bylaws, the Board shall annually appoint the members and the chairs of the standing committees and shall fill vacancies on any standing committee. Appointments to the standing committees shall be made by the Board at the annual meeting. In addition, the President may, if so authorized by the Board, appoint the members and chairs of such special committees as the Board may create, which members and chairs may include persons who are not members of the Board. All committee appointments and chair appointments must be approved by a vote of the Board.

4.2 **Standing Committees.** Standing committees shall be created as required by resolution of the Board. The purpose, duties, number of members, and reporting requirements of each standing committee shall be specified in the resolution creating the committee.

4.3 **Special Committees.** Special committees shall be created as required by resolution of the Board. The purpose, duties, number of members, and reporting requirements of each special committee shall be specified in the resolution creating the committee.

4.4 **Committee Members' Term of Office.** Unless otherwise specified by resolution of the Board, members of each committee shall continue in office until the next annual meeting of the Board and until their successors are appointed, unless the committee of which they are members shall be sooner terminated by resolution of the Board or until their earlier death, resignation, or removal as committee members.

4.5 **Committee Meetings.** Meetings of any committee may be called by the chairman of such committee or upon the written request of one-third (1/3) of the committee members. The call for any meeting shall be by giving notice of such meeting which sets forth its time and place and is delivered to the residence or place of business of the committee members as listed in the Secretary's office at least five (5) days prior to such meeting. Unless otherwise provided in these Bylaws, a majority of the members of any committee shall constitute a quorum for the transaction of business. After a quorum has been established at a committee meeting, the subsequent withdrawal of committee members from the meeting so as to reduce the number of committee members present to fewer than the number required for a quorum shall not affect the validity of any action taken at the meeting. Each committee shall keep minutes of its meetings and report to the Board as necessary with recommendations.

4.6 **Resignation or Removal of Committee Members.** A member of any committee may resign at any time by tendering his/her resignation in writing to the President or the Board. The Board, by a vote, may remove, with or without cause, any member from a committee and specifically, but not by way of limitation, may remove any member from a committee for failing to attend three (3) consecutive meetings of the committee.

## **ARTICLE V** **OFFICERS**

5.1 **Officers.** The officers of the Corporation shall be a President, a Secretary and a Treasurer. The Corporation may also have, at the discretion of the Board one or more Vice Presidents, and such other officers as determined by the Board. Any number of offices may be held by the same person; provided however, no officer shall execute, acknowledge or verify any instrument in more than one capacity. Officers need not be residents of the State of Arizona or United States citizens. Officers need not be Directors of the Corporation.

5.2 **Appointment and Term of Office.** The officers of the Corporation shall be appointed annually by the Board at the annual meeting. If the appointment of officers does not occur at this meeting, the appointment shall occur as soon thereafter as practicable. Each officer shall hold office until a successor has been duly appointed and qualified, or until an earlier resignation, removal from office, or death.

5.3 **Vacancies.** A vacancy in any office because of death, resignation, removal, disqualification, or otherwise shall be filled by an election by the Board for the remaining unexpired term of such office.

5.4 **Removal of Officers.** The Board may remove any officer of the Corporation from his or her office or position at any time, with or without cause.

5.5 **Resignation of Officers.** Any officer of the Corporation may resign at any time from his or her office or position by delivering notice to the President. Such resignation is effective when the notice is delivered unless the notice specifies a later effective date. If a resignation is made effective at a later date and the corporation accepts the future effective date, the Board may fill the pending vacancy before the effective date if the Board provides that the successor does not take office until the effective date.

5.6 **President.** The President shall be the chief executive officer of the Corporation and shall, subject to the control of the Board, have general supervision, direction and control of the business and the officers of the Corporation. The President shall preside at all meetings of the Corporation. The President shall have the general powers and duties of management usually vested in the office of President of a Corporation, and shall have such other powers and duties as may be prescribed by the Board or the Bylaws.

5.7 **Vice Presidents.** The Vice Presidents shall have such other powers and perform such other duties as from time to time may be prescribed for them respectively by the Board or the President.

5.8 **Secretary.** The Secretary shall keep or cause to be kept, at the principal office or such other place as the Board may direct, a book of minutes of all meetings and actions of Directors and committees of Directors, with the time and place of holding, whether regular or special, and if special, how authorized, the notice given, the names of those present and a record of the proceedings. The Secretary shall give, or cause to be given, notice of all meetings required by the Bylaws or by law to be given, and he shall keep the seal of the Corporation if one is adopted, in safe custody, and shall have such other powers and perform such other duties as may be prescribed by the Board or by the Bylaws.

5.9 **Treasurer.** The Treasurer shall keep and maintain, or cause to be kept and maintained, adequate and correct accounting records of all transactions of the Corporation including accounting for its assets, liabilities, receipts, disbursements, gains and losses. The Treasurer shall deposit or cause to be deposited all moneys and other valuables in the name and to the credit of the Corporation with such depositaries as may be designated by the Board. The Treasurer shall prepare, or have prepared, financial statements on a periodic basis including a statement of financial position, statement of activities, statement of cash flows and such other statements as requested by the President and the Board or those that are required to be in compliance with not-for-profit accounting. The Treasurer shall have such other powers and perform such other duties as may be prescribed by the Board or Bylaws.

5.10 **Succession of Officers.** Unless otherwise directed by a vote of the Board, in the event that an officer of the Corporation has not resigned or been removed but is unable to act in such position for a period of one (1) month or more, whether due to disability or other reason, then another officer of the Corporation shall serve in that office until such officer is either removed or is able to perform his/her services in the following order:

- (a) The Vice President shall perform the services of the President.
- (b) The President shall perform the services of the Secretary.
- (c) The Secretary shall perform the services of the Treasurer.

5.11 **Salaries.** Each officer may be paid a reasonable salary, as may from time to time be determined by action of the Board, unless prohibited by law or otherwise. No such payment shall preclude any officer from serving this corporation in any other capacity and receiving compensation for such services, except that no director shall receive any compensation, direct or indirect, from the charter school's operations or as otherwise may be prohibited by applicable law or the terms of any charter school charter.

## **ARTICLE VI BOOKS AND RECORDS**

The Corporation shall maintain accurate and complete accounting records and shall keep records of minutes of all meetings of its Board, a record of all actions taken by the Board without a meeting, and a record of all actions taken by a committee of the Board in place of the Board on behalf of the Corporation. The Corporation shall keep a copy of the following records: (a) its Articles or Restated Articles of Incorporation and all amendments thereto currently in effect; (b) its Bylaws or Restated Bylaws and all amendments thereto currently in effect; (c) a list of the names and business street addresses of its current Directors and officers; and (d) its most recent annual report delivered to the Department of State. Any books, records and minutes may be in written form or in any other form capable of being converted into written form within a reasonable time.

## **ARTICLE VII INDEMNIFICATION**

7.1 Indemnification. This Corporation shall indemnify its directors and its officers to the fullest extent permitted by the provisions of Arizona Law, as the same may be amended and supplemented, from and against any and all of the expenses or liabilities incurred in defending a civil or criminal proceeding, or other matters referred to in or covered by said provisions, including advancement of expenses prior to the final disposition of such proceedings and amounts paid in settlement of such proceedings. The indemnification provided for herein shall not be deemed exclusive of any other rights to which those indemnified may be entitled under any bylaw, agreement, vote of disinterested directors or otherwise, both as to action in his or her official capacity and as to action in another capacity while holding such office. The right to indemnification shall continue as to a person who has ceased to be a director or officer and shall inure to the benefit of the heirs, executors and administrators of such a person, and an adjudication of liability shall not affect the right to indemnification for those indemnified.

7.2 Insurance. The Corporation may purchase and maintain insurance on behalf of any person who is or was a director, officer, employee or agent of the Corporation or who is or was serving at the request of the Corporation as a director, officer, employee, or agent of another corporation, partnership, joint venture, trust, or other enterprise against any liability asserted against him/her and incurred by him/her in any such capacity or arising out of his/her status as such, whether or not the Corporation would have the power to indemnify him/her against such liability under the provisions of this Article VII.

## ARTICLE VIII MISCELLANEOUS

8.1 Corporate Seal. The Board may provide for a corporate seal which may be facsimile, engraved, printed or an impression seal which shall be circular in form and shall have inscribed thereon the name of the corporation, the words "Seal" and "Not for Profit, Arizona" and the year of incorporation.

8.2 Execution of Contracts. The Board, except as may be otherwise provided in these Bylaws, may authorize any officer or officers, employee or employees, agent or agents, to enter into any contract or execute and deliver any contract or other instrument in the name of and on behalf of the Corporation, and such authority may be general or confined to specific instances. Unless authorized so to do by these Bylaws or the Board, no officer or agent or employee shall have any power or authority to bind the Corporation by any contract or engagement, or to pledge its credit, or to render it liable pecuniarily for any purpose or in any amount.

8.3 Deposits. All funds of the Corporation not otherwise employed shall be deposited from time to time to the credit of the Corporation in such banks, trust companies or other depositories as may be designated from time to time by the Board or a committee of the Board to which it may delegate such power, or any officer or officers, employee or employees, or agent or agents of the Corporation to whom such power may be delegated by the Board or by such committee, and for the purpose of such deposit, all checks, drafts, and other orders for the payment of money which are payable to the order of the Corporation, may be endorsed,

assigned and delivered by any officer of the Corporation or in such other manner as may from time to time be determined by resolution of the Board or of such committee.

8.4 Bon-owing, Checks, Drafts, Etc. The Corporation, whenever its general interests require, may borrow money, obtain credit and issue evidences of indebtedness for the repayment thereof, may guarantee evidences of indebtedness or other types of securities issued by others, and may assign and grant interests in any property or assets of the Corporation as security for such debts and obligations. All promissory notes, guarantees, checks, drafts or other evidences of indebtedness issued in the name of the Corporation shall be signed or endorsed by such officer or officers, employee or employees, or agent or agents of the Corporation, as shall from time to time be determined by resolution of the Board.

8.5 Gender. All masculine pronouns and any variations thereof shall be deemed to refer to the masculine, feminine or singular or plural as the identity of the person(s) may require.

## **ARTICLE IX AMENDMENTS**

These Bylaws may be altered, amended or repealed and new Bylaws may be adopted by a majority vote of the Board.

### **CERTIFICATE OF ADOPTION OF BYLAWS**

I certify that I am the elected and acting Secretary of Somerset Academy Arizona, Inc., a Arizona nonprofit corporation, and that the foregoing Bylaws constitute the Bylaws of such corporation as adopted by the Board of Directors.

---

Secretary



**SOMERSET ACADEMY ARIZONA, INC.  
BOARD RESOLUTION**

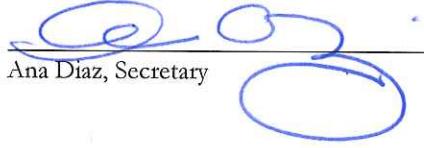
The undersigned hereby certifies that he/she is a Director of SOMERSET ACADEMY ARIZONA, INC and that the following is a true and correct copy of a resolution adopted by the Board of Directors of said corporation and sponsored charter schools at a meeting held on May 8, 2019:

**RESOLVED** by the Board of Directors of Somerset Academy Arizona, Inc. to approve the filing of a new charter school application, Somerset Academy of the West Valley, a K-5 charter school, with the Arizona State Board for Charter Schools.

That the Adoption of said resolutions was in all respects legal and that said resolutions are in full force and effect and have not been modified or rescinded.

DATED May 10th, 2018

SOMERSET ACADEMY ARIZONA, INC.

By:   
Ana Diaz, Secretary

**COPY**

RECEIVED

MAY 14 2018

ARIZONA CORP. COMMISSION  
CORPORATIONS DIVISION

## ARTICLES OF INCORPORATION

OF

### Somerset Academy Arizona, Inc. An Arizona Nonprofit Corporation

*I, the undersigned incorporator, for the purpose of filing the Articles of Incorporation for Somerset Academy Arizona, Inc. (the "Corporation"), a corporation organized under the laws of Arizona do hereby execute the following Articles of Incorporation, and certify as follows:*

#### ARTICLE I      NAME

The name of the corporation shall be: Somerset Academy Arizona, Inc.

#### ARTICLE II      PURPOSE

The purpose for which this corporation is organized is the transaction of any and all lawful business for which nonprofits may be incorporated under the laws of the State of Arizona, as they may be amended from time to time.

#### ARTICLE III      CHARACTER OF AFFAIRS

The Corporation is not-for-profit and is organized and shall be operated exclusively for charitable, educational, and scientific purposes as described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended or the corresponding provision of any future United States Internal Revenue Law (the "Code"), including, without limitation, the organization, support and operation of charter schools, and all ancillary programs; the development and delivery of instructional services; the development, research-based validation, and implementation of curriculum; and including for such purposes the making of distributions to organizations that qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended ("Code"). The Corporation may be operated for the benefit of any new or additional organizations described in Section 509(a)(1) or 509(a)(2) of the Code which are organized and operated to support education as shall be determined by the Board of Directors of the Corporation.

#### ARTICLE IV      MEMBERSHIP

The Corporation's sole member shall be Somerset Academy Inc., a Florida not-for-profit Corporation, (the "Member"). The Member shall have such rights as shall be set forth in the Bylaws.

#### ARTICLE V      ARIZONA KNOWN PLACE OF BUSINESS ADDRESS

The initial known place of business for the corporation is the same as the statutory agent.

## **ARTICLE VI        ELECTION OF DIRECTORS**

The manner in which the directors are elected or appointed shall be as provided in the Bylaws.

## **ARTICLE VII        INITIAL DIRECTORS**

The Initial Directors of the Corporation shall be as follows:

Lourdes Isla Marrero  
9010 NW 178th Lane  
Miami, FL 33018

Tony Morales  
16265 NW 20th Street  
Pembroke Pines, FL 33028

Ana Diaz  
11209 SW 112th Street  
Miami, FL 33176

Taylor Smith  
2233 Seminole Road  
Unit 2  
Atlantic Beach, FL 32233

Todd German  
2315 N. Roosevelt Blvd.  
Key West, FL 33040

## **ARTICLE VIII        STATUTORY AGENT AND STREET ADDRESS**

The name and street address of the statutory agent are:

Corporation Service Company  
2338 W. Royal Palm Road, Suite J  
Phoenix, AZ 85021

## **ARTICLE IX        INCORPORATOR**

The name and address of the Incorporator of the Corporation is:

Collette D. Papa, Esq.  
6340 Sunset Drive  
Miami, FL 33143

## **ARTICLE X            CHARITABLE ORGANIZATIONS PROVISIONS**

Notwithstanding any powers granted to the Corporation by its Articles, By Laws or by the laws of the State of Arizona, the following limitations of power shall apply:

1. The Corporation is organized exclusively for charitable, educational and scientific purposes, including for such purposes the making of distributions to organizations that qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended ("Code").

2. The Corporation admits students of any race, color, national, and ethnic origin to all rights, privileges, programs, and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admissions policies, scholarship, and loan programs, and athletic and other school-administered programs.

3. No part of the earnings of the Corporation shall inure to the benefit of any member, director or officer of the Corporation, or to any other person (except that the Corporation may pay reasonable compensation for services rendered to or on behalf of the Corporation and make other payments and distributions in furtherance of one or more of its purposes), and no director or officer of the Corporation, or any other person shall be entitled to share in the distribution of any of the corporate assets on dissolution of the Corporation. The Corporation shall pay no dividends.

4. No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation. The Corporation shall not participate, directly or indirectly, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. The Corporation shall not have the objectives nor engage in activities that would characterize it as an "action organization" as defined in Treasury Regulations.

5. Notwithstanding any other provision of these articles, the Corporation shall not carry on any activities not permitted to be carried on by an organization exempt from Federal income tax under Section 501(c)(3) of the Code.

6. Upon the dissolution of the Corporation, the Board of Directors will, after paying or making provision for the payment of all the liabilities of the Corporation, dispose of all the assets of the Corporation exclusively to the Member, hereinafter defined, provided that at the time of such distribution the Member is a not for profit corporation or trust described in Section 509(a)(1) or 509(a)(2) of the Code (an "Eligible Distributee"). In the event the Member is not an Eligible Distributee, upon the dissolution of the Corporation, the Board of Directors will, after paying or making provision for the payment of all the liabilities of the Corporation, dispose of all the assets of the Corporation exclusively to not for profit corporations or trusts described in Section 509(a)(1) or 509(a)(2) of the Code which are organized and operated to support education including, but not limited to, specifically the support and operation of charter schools.

## **ARTICLE XI INDEMNIFICATION**

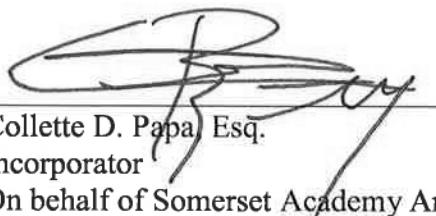
The power of indemnification under the Arizona Revised Statutes shall not be denied or limited by the Bylaws of the Corporation.

## **ARTICLE XII AMENDMENTS**

These Articles of Incorporation may be further amended by action of the Board of Directors of the Corporation. Amendments may be proposed and adopted in the manner provided in the Bylaws of the Corporation.

IN WITNESS WHEREOF, the undersigned Incorporator of the Corporation has executed these Articles of Incorporation this 11th day of May, 2018.

By:



Collette D. Papa, Esq.  
Incorporator  
On behalf of Somerset Academy Arizona, Inc.

## **ACCEPTANCE OF APPOINTMENT AS STATUTORY AGENT**

Having been named as statutory agent and to accept service of process for Somerset Academy Arizona, Inc. (the "Corporation"), an Arizona nonprofit corporation, at the place designated in the foregoing Articles of Incorporation, Corporation Service Company, hereby accepts the appointment as statutory agent and agrees to act in this capacity. Corporation Service Company further agrees to comply with all provisions of Arizona Law relating to the proper and complete performance of its duties, and Corporation Service Company is familiar with and accepts the obligations of its position as statutory agent as provided for in Arizona Law.

### **STATUTORY AGENT:**

Corporation Service Company

By: *Elizabeth A. Smith*  
Name: Elizabeth A. Smith  
Title: Assistant Vice President

DO NOT WRITE ABOVE THIS LINE; RESERVED FOR ACC USE ONLY.

## CERTIFICATE OF DISCLOSURE

*Read the Instructions C003i*

**1. ENTITY NAME** – give the exact name of the corporation in Arizona:

Somerset Academy Arizona, Inc.

**2. A.C.C. FILE NUMBER** (if already incorporated or registered in AZ):

Find the A.C.C. file number on the upper corner of filed documents OR on our website at: <http://www.azcc.gov/Divisions/Corporations>

**3. Check only one of the following to indicate the type of Certificate:**

- Initial (accompanies formation or registration documents)
- Annual (credit unions and loan companies only)
- Supplemental to COD filed \_\_\_\_\_ (supplements a previously-filed Certificate of Disclosure)

**4. FELONY/JUDGMENT QUESTIONS:**

Has any person (a) who is currently an officer, director, trustee, or incorporator, or (b) who controls or holds over ten per cent of the issued and outstanding common shares or ten per cent of any other proprietary, beneficial or membership interest in the corporation been:

<b>4.1</b>	Convicted of a felony involving a transaction in securities, consumer fraud or antitrust in any state or federal jurisdiction within the five-year period immediately preceding the signing of this certificate?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>4.2</b>	Convicted of a felony, the essential elements of which consisted of fraud, misrepresentation, theft by false pretenses or restraint of trade or monopoly in any state or federal jurisdiction within the five-year period immediately preceding the signing of this certificate?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>4.3</b>	Subject to an injunction, judgment, decree or permanent order of any state or federal court entered within the five-year period immediately preceding the signing of this certificate, involving any of the following:  a. The violation of fraud or registration provisions of the securities laws of that jurisdiction; b. The violation of the consumer fraud laws of that jurisdiction; c. The violation of the antitrust or restraint of trade laws of that jurisdiction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>4.4</b>	If any of the answers to numbers 4.1, 4.2, or 4.3 are <b>YES</b> , you <b>MUST</b> complete and attach a Certificate of Disclosure Felony/Judgment Attachment form C004.		

## 5. BANKRUPTCY QUESTION:

<p><b>5.1</b> Has any person (a) who is currently an officer, director, trustee, incorporator, or (b) who controls or holds over twenty per cent of the issued and outstanding common shares or twenty per cent of any other proprietary, beneficial or membership interest in the corporation, served in any such capacity or held a twenty per cent interest in <b>any other corporation</b> (not the one filing this Certificate) on the bankruptcy or receivership <b>of the other corporation?</b></p>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<p><b>5.2</b> If the answer to number 5.1 is <b>YES</b>, you <b>MUST</b> complete and attach a Certificate of Disclosure Bankruptcy Attachment form C005.</p>		

**IMPORTANT:** If within 60 days of the delivery of this Certificate to the A.C.C. any person not included in this Certificate becomes an officer, director, trustee or person controlling or holding over ten per cent of the issued and outstanding shares or ten per cent of any other proprietary, beneficial or membership interest in the corporation, the corporation must submit a SUPPLEMENTAL Certificate providing information about that person, signed by all incorporators or by a duly elected and authorized officer.

### SIGNATURE REQUIREMENTS:

Initial Certificate of Disclosure:	This Certificate must be signed by all incorporators. If more space is needed, complete and attach an Incorporator Attachment form C084.	
Foreign corporations:	This Certificate may be signed by a duly authorized officer or by the Chairman of the Board of Directors.	
Credit Unions and Loan Companies:	This Certificate must be signed by any 2 officers or directors.	

Collette D. Papa

Name

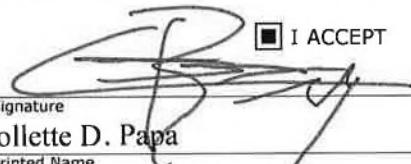
6340 Sunset Drive

Address 1

Address 2 Miami	FL	33143
City Country	State UNITED STATES	Zip

### SIGNATURE – see Instructions C003i:

By typing or entering my name and checking the box marked "I accept" below, I acknowledge *under penalty of perjury* that this document together with any attachments is submitted in compliance with Arizona law.



I ACCEPT

Signature

Collette D. Papa

Printed Name

5/11/2018

Date

### REQUIRED – check only one:

- Incorporator** - I am an incorporator of the corporation submitting this Certificate.
- Officer** - I am an officer of the corporation submitting this Certificate
- Chairman of the Board of Directors** - I am the Chairman of the Board of Directors of the corporation submitting this Certificate.
- Director** - I am a Director of the credit union or loan company submitting this Certificate.

Name

Address 1

Address 2

City	State	Zip
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Country

### SIGNATURE – see Instructions C003i:

By typing or entering my name and checking the box marked "I accept" below, I acknowledge *under penalty of perjury* that this document together with any attachments is submitted in compliance with Arizona law.

I ACCEPT

Signature

Printed Name

Date

### REQUIRED – check only one:

- Incorporator** - I am an incorporator of the corporation submitting this Certificate.
- Officer** - I am an officer of the corporation submitting this Certificate
- Chairman of the Board of Directors** - I am the Chairman of the Board of Directors of the corporation submitting this Certificate.
- Director** - I am a Director of the credit union or loan company submitting this Certificate.

Filing Fee: None

All fees are nonrefundable - see Instructions.

Mail: Arizona Corporation Commission - Corporate Filings Section  
1300 W. Washington St., Phoenix, Arizona 85007  
Fax: 602-542-4100

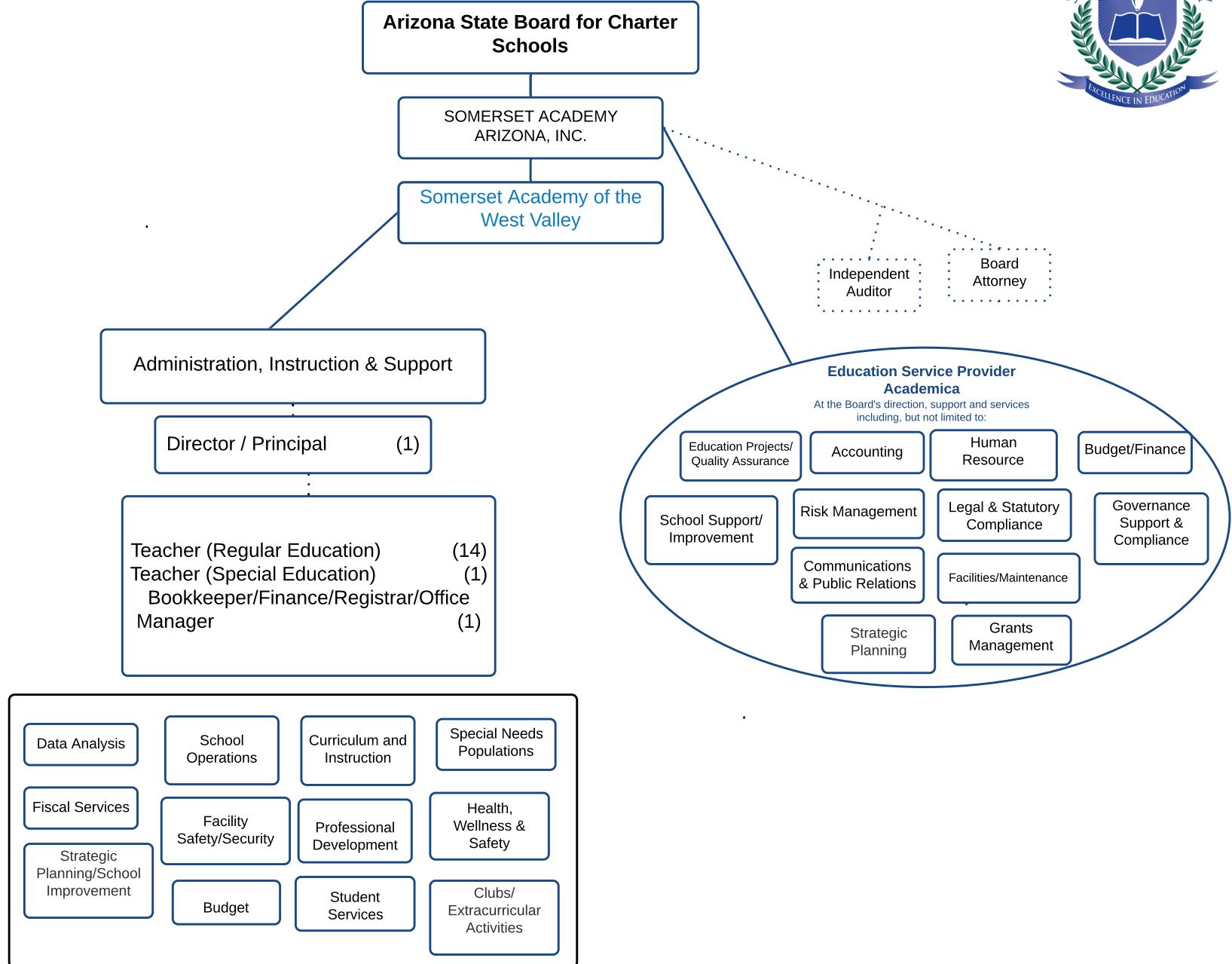
Please be advised that A.C.C. forms reflect only the **minimum** provisions required by statute. You should seek private legal counsel for those matters that may pertain to the individual needs of your business.

All documents filed with the Arizona Corporation Commission are **public record** and are open for public inspection.

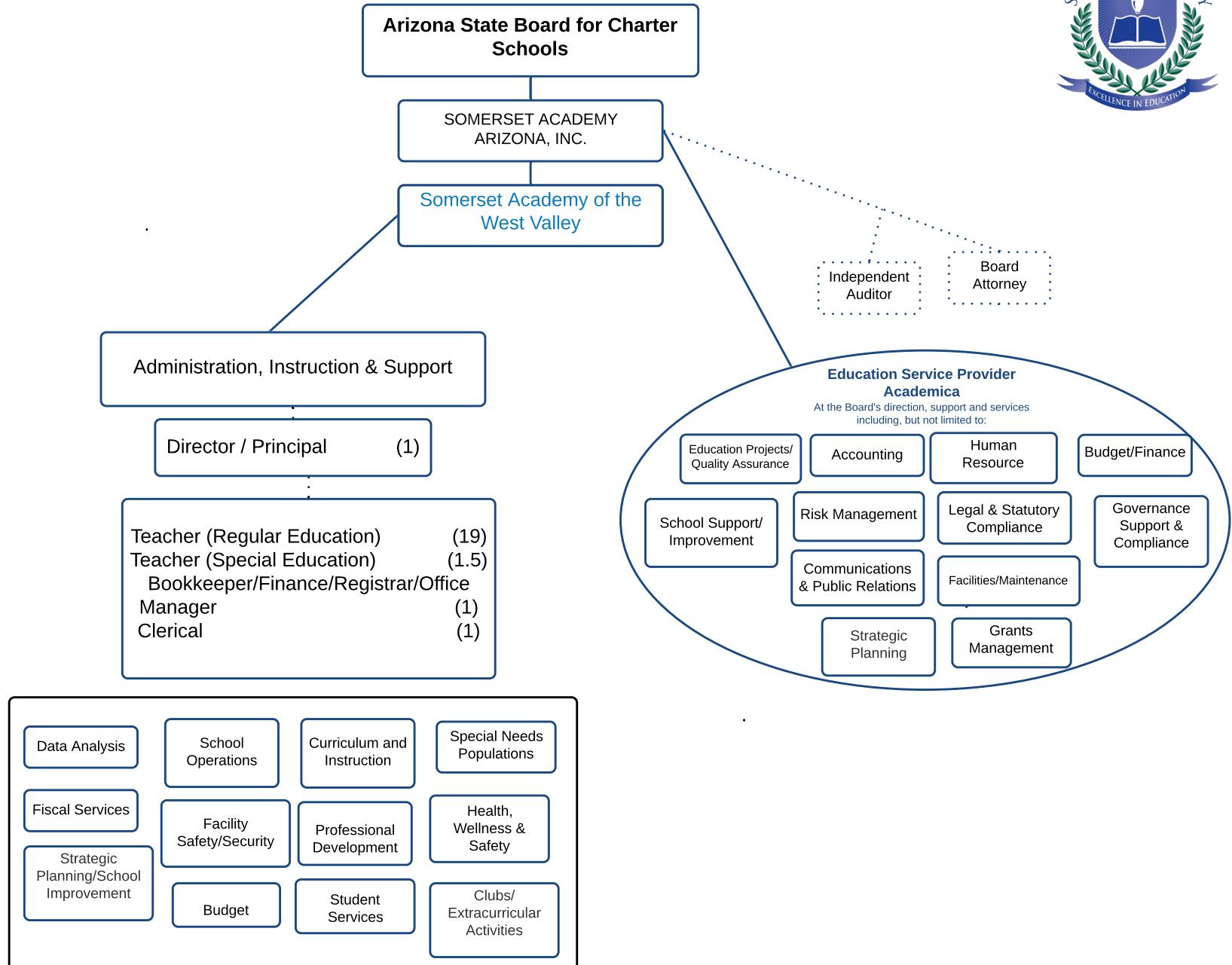
If you have questions after reading the Instructions, please call 602-542-3026 or (within Arizona only) 800-345-5819.

## EXHIBIT ORG CHARTS

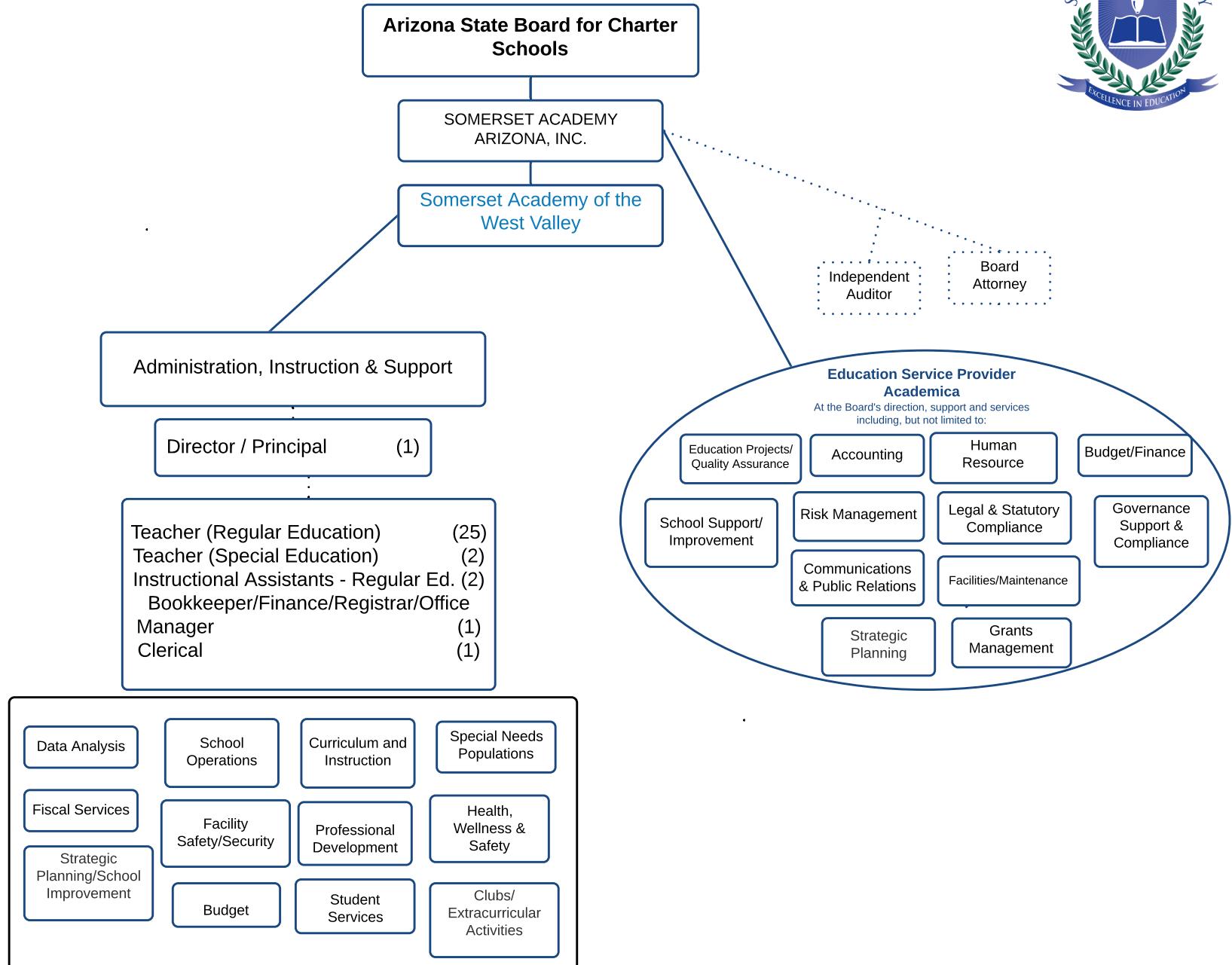
**Year 1 Organizational Chart**



## Year 2 Organizational Chart



## Year 3 Organizational Chart



## 2019 ANNUAL REPORT

### ENTITY INFORMATION

**ENTITY NAME:** SOMERSET ACADEMY ARIZONA, INC.  
**ENTITY ID:** 22875815  
**ENTITY TYPE:** Domestic Nonprofit Corporation  
**CHARACTER OF BUSINESS:** Charter School  
**AUTHORIZED SHARES:**  
**ISSUED SHARES:**

### STATUTORY AGENT INFORMATION

**STATUTORY AGENT NAME:** CORPORATION SERVICE COMPANY  
**PHYSICAL ADDRESS:** 8825 N 23rd Avenue, Suite 100, PHOENIX, AZ 85021  
**MAILING ADDRESS:**

### KNOWN PLACE OF BUSINESS

8825 N 23rd Avenue, Suite 100, PHOENIX, AZ 85021

### PRINCIPAL OFFICE ADDRESS

### PRINCIPAL INFORMATION

Director: TAYLOR SMITH - 2233 SEMINOLE ROAD UNIT 2, ATLANTIC BEACH, FL 32233, USA - - Date of Taking Office: 05/14/2018

Director: TODD GERMAN - 2315 N ROOSEVELT BLVD, KEY WEST, FL 33040, USA - - Date of Taking Office: 05/14/2018

President: LOURDES ISLA MARRERO - 9010 NW 178TH LANE, MIAMI LAKES, FL 33018, USA - - Date of Taking Office: 05/14/2018

Secretary: ANA DIAZ - 11209 SW 112TH STREET, MIAMI, FL 33176, USA - - Date of Taking Office: 05/14/2018

### SIGNATURE

Secretary: Ana Diaz - 05/13/2019

### FELONY JUDGEMENT QUESTIONS

Has any person (a) who is currently an officer, director, trustee, or incorporator, or (b) who controls or holds over ten per cent of the issued and outstanding common shares or ten percent of any other proprietary, beneficial or membership interest in the corporation been:

Convicted of a felony involving a transaction in securities, consumer fraud or antitrust in any NO state or federal jurisdiction within the seven-year period immediately preceding the signing of this certificate?

Convicted of a felony, the essential elements of which consisted of fraud, misrepresentation, NO theft by false pretenses or restraint of trade or monopoly in any state or federal jurisdiction within the seven-year period immediately preceding the signing of this certificate?

Subject to an injunction, judgment, decree or permanent order of any state or federal court entered within the seven-year period immediately preceding the signing of this certificate, NO involving any of the following:

The violation of fraud or registration provisions of the securities laws of that jurisdiction;

The violation of the consumer fraud laws of that jurisdiction;

The violation of the antitrust or restraint of trade laws of that jurisdiction?

## BANKRUPTCY QUESTION

Has any person (a) who is currently an officer, director, trustee, incorporator, or (b) who controls or holds over twenty NO per cent of the issued and outstanding common shares or twenty per cent of any other proprietary, beneficial or membership interest in the corporation, served in any such capacity or held a twenty per cent interest in *any other corporation (not the one filing this Certificate)* on the bankruptcy or receivership of *the other corporation*?

**B.2**

# **School Governing Body**

## **B.2 School Governing Body**

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*B.2.a Clearly identify the specific roles and the responsibilities of the School Governing Body as per A.R.S. § 15- 183 (E)(8).*

The Somerset Academy Arizona, Inc. Governing Board is the ultimate policy-making body with the responsibility of operation and oversight of the school including but not limited to academic direction, curriculum, and budgetary functions. The school principal, hired by the board, will be responsible for all aspects of school operations within the scope of operating policies and procedures and budgetary functions as adopted and approved by the Governing Board. The school's faculty and staff will report directly to the principal, who shall report to the Governing Board.

The governing board of directors (the "Governing Board") will have the responsibility for the activities and affairs of the corporation, including management of the school and for providing continuing oversight of school operations. All corporate powers and functions shall be exercised by the Governing Board. The Governing Board is committed to the mission of the school and is cognizant of its responsibility to effectively and properly manage public funds.

The School's on-site administration (principal, an assistant principal and/or lead teacher) will ensure that the operations of the School (resources, courses, policies) are in accordance with the mission and vision of the School as adopted and approved by the Governing Board. The administrative staff, as instructional leaders, will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the School. The faculty and secretarial staff will be responsible for carrying out these procedures in their daily activities and interactions with students, parents and the community.

The policies and procedures by which the board will operate, including specific board member powers are specifically detailed in the attached Bylaws.

A brief overview of those policies and procedures is as follows:

**Board Member Powers:** Subject to the limitations of the Arizona not-for-profit corporation law, the corporation's Articles of Incorporation and Bylaws, the activities and affairs of the corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board. The Board shall have the following powers in addition to any other powers enumerated in the Bylaws and permitted by law:

- Select and remove all of the officers, agents and employees of the corporation and prescribe powers and duties for them which are not inconsistent with the law
- To conduct, manage and control the affairs and activities of the corporation
- To adopt, make and use a corporate seal
- To borrow money and incur indebtedness for the purpose of the corporation
- To act as trustee under any trust incidental to the principal object of the corporation, and receive, hold, administer, exchange and expend funds and property subject to such trust
- To acquire by purchase, exchange, lease, gift, devise, bequest or otherwise, and to hold, improve, lease, sublease, mortgage, transfer in trust, encumber, convey or otherwise dispose of real and personal property
- To assume any obligations, and enter into any contracts or other instruments

- To form and be a member or shareholder of a not-for-profit entity organized under the law of any state
- To carry out such duties as described in the Articles of Incorporation and Charter Contract

**Board Member Duties:** The Governing Board will perform the following duties, as well as any and all other duties specified in Arizona Statutes regarding Governing Boards of Charter Schools and any other duties specified in the Bylaws:

- Oversee operational policies; Academic accountability, and financial accountability.
- Annually adopt and maintain an operating budget.
- Exercise continuing oversight over charter school operations.
- Report its progress annually to its sponsor, which shall forward the report to the Commissioner of Education at the same time as other annual school accountability reports.
- Ensure that the charter school has retained the services of a certified public accountant for the annual financial audit who shall submit the report to the governing body.
- Review and approve the audit report, including audit findings and recommendations
- Monitor a financial recovery plan in order to ensure compliance (if applicable).
- Report progress annually to its sponsor

The Governing Board will govern according to the Bylaws which stipulate the responsibilities and polices by which the Board is legally bound. Please see Bylaws for detailed information. To briefly summarize, the Somerset Academy Arizona Governing Board will comply with Open Meeting Laws as stated in A.R.S 38-431.02 (A)(1) through (4). Notice of all meetings shall be given before the time of the holding of the meeting in accordance with applicable law, rules, and regulations. Notice in each case shall specify the place, day and hour of the meeting, and in the case of a special meeting, the purpose or purposes of the special meeting, provided that these Bylaws may be neither amended nor repealed nor may new Bylaws be adopted at any meeting unless the notice of such meeting shall contain a description of the proposed changes. Notice shall be given by the Secretary, or the Secretary's designee, or in his or her absence or upon his or her failure to act, by an officer designated by the Chairperson of the Board.

### **Governing Board Officer Description**

The officers of the Board will include the Chairperson, Vice-Chairperson, Secretary, and Treasurer. The Board may also assign responsibilities to trustees without assigning them a specific title.

#### ***Chairperson of the Governing Board***

- Oversee the effectiveness of officers and board governance
- Guide and assist all other officers to ensure that duties are suitably performed
- Work with School Principal to create board agenda, strategic plans, and other areas that the School Principal may need assistance
- Communicate regularly with School Principal, committee chairs, and board members
- Create other committees if necessary, to research or perform tasks that would support the school

#### ***Vice - Chairperson of the Governing Board***

- Perform duties of the Board Chair if he/she is not present or is in need of assistance.

#### ***Treasurer of the Governing Board***

- Collaborate with the School Principal to prepare quarterly statements and school budgets
- Assist School Principal to ensure that the school is in compliance with all financial reporting requirements
- Work with the School Principal to communicate all financial requests and the financial position of the school to the Governing Board
- Perform other duties if necessary and requested by the Board Chair

***Secretary of the Governing Board***

- Collaborate with Office Manager at school to be sure that notices of meetings are posted as required by Open Meeting Laws (described in the bylaws)
- Record all votes and official minutes of the board meetings
- Maintain both electronic and hard copies of bylaws and other important documents
- Retain copies of both agendas and board minutes for all board meetings

*B.2.b Clearly indicate if the corporate board for 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.*

All powers of the Corporation shall be exercised by and under the authority of the Governing Board of Somerset Academy Arizona, Inc., and the property, business, and affairs of the Corporation shall be managed under the Governing Board's direction. The Governing Board is the ultimate policy--making body for the school, and will have the responsibility for the affairs and management of the school. The Governing Board will provide continuing oversight of school operations, including a responsibility to effectively and properly manage school funds.

Pursuant to the Articles of Incorporation, Somerset Academy Arizona, Inc. is a company of Somerset Academy, Inc. ("The Somerset Foundation"), a Florida non--profit corporation. Somerset Academy Foundation, the parent organization, is the sole member of Somerset Academy. The Somerset Academy Foundation is a Florida non--profit and 501(c)(3) federal tax--exempt organization that provides support to all schools in the Somerset network nationwide. As the parent organization, The Somerset Foundation retains specified corporate functions as detailed in the Articles of Incorporation which include: issuing new or additional membership interests; any corporate merger, consolidation, dissolution, or liquidation; any amendment to the Articles of Incorporation or bylaws; appointment of directors and/or designation of officers; financing; inability to pay debts, insolvency, or corporate bankruptcy.

*B.2.c Describe how the composition of the school governing body will have the capacity to fulfill its requirements and supports the school's mission.*

The following is a list of the members of the school's governing board and a brief description of their backgrounds, skills, and experience highlighting their proposed contribution in servicing as a governing board member. As stated in the bylaws and Articles of Incorporation, the initial Board for consisted of 5 members. Once established a member resigned, reflected in the annual filing. At 4 board members, the board meets the minimum number of board members as described in the Bylaws of 3 members. Somerset Academy Arizona, Inc. is actively seeking local representation to become part of the Somerset Academy Arizona Governing Board. Somerset Academy wants to ensure that the voice of the community is represented on the board. This will ensure that the vision and mission is upheld and the "neighborhood" school paradigm is respected.

## **Somerset Academy Arizona Board Members**

### **Lourdes Isla**

Lourdes Isla-Marrero began her career in 1999 at Mater Academy East Charter School, in the Little-Havana area in Miami, Florida. For 3 years she taught kindergarteners how to read, write and do math. During her 3rd year she was promoted to Lead teacher and was handed the task of liaison between the National School Lunch Program and Mater Academy, Inc. which at the time had 5 schools under its umbrella. The following two year she was Assistant Principal at the same school. In 2006, she was promoted to be the Principal of Mater Gardens Academy K-8 School. She opened the school with an estimated 400 students K-6th grade and slowly grew it to the successful school it is currently. In 2014, the school was nominated and won a Blue Ribbon Award from the Dept. of Education for obtaining academic excellence. In 2018, Ms. Isla was promoted to Dean of the Bachelors of Science Program at Doral College. She is currently working on having the program approved by the FLDOE and DEAC. In the meantime, she is still the liaison for the NSLP and Mater Academy, Inc. which currently manages 25 schools and she has been a Somerset Board member/chair for the past 10 years.

### **Todd German**

Mr. German is an Investment Advisor and partner in Keys Wealth Management, a private investment management firm. He has served as senior officer for a number of local financial institutions. Most recently, in addition to serving as board member and Treasurer of the Somerset board, Todd is the President of the Key West Collegiate School, Chairman of Hometown PAC, and member of the Key West Citizen Editorial Board. His past volunteer time was spent as the President of the Key West Business Guild, Vice Chair of the Community Foundation, President of the Montessori Charter Elementary School, Chair of the Key West Citizen's Review Board, and former President of the Key West Botanical Garden Society. Todd is a graduate of Leadership--Monroe County, the Key West Ambassador Program and the Key West Citizen's Police Academy. He holds memberships in all the associations promoting business in Key West--the Attractions, Lodging, Innkeeper's and Realtor's Associations. Mr. German brings financial, real estate and charter school governance experience.

### **Ana Diaz**

Ms. Diaz has been in the field of education for over fifteen years. She earned her Master's Degree in Elementary Education from the University of Florida and began her career as a teacher in the Miami-Dade County Public School System. Ms. Diaz continued her studies at Nova Southeastern University where she completed her certification in Educational Leadership. In the fall of 2005, Ms. Diaz began working with Charter Schools and she serves as the Principal of Pinecrest Preparatory Academy Charter School. In addition to supervising the daily school operations, her areas of expertise include curriculum planning, program evaluation, data analysis, assessment design and professional development. Ms. Diaz has effectively provided oversight and support in her areas of expertise for several of the Somerset schools

### **Taylor Smith**

Taylor Smith is the President and founder of Project Finance & Development Inc. (PFDI) which specializes in charter school site location and development. PFDI has worked with various charter school networks and stakeholders and has established all of the Florida Educational Facilities Benefit Districts currently in existence. Together with its affiliated companies, PFDI has financed and developed charter schools, school concurrency projects, public roads, residential

developments, mixed-use projects, parking garages, and mixed-use office/retail projects. The projects and tax-exempt financings total over \$960,000,000. In addition, Mr. Smith served on Florida's founding Charter School Review Panel as well as the Florida Greenways Commission. Mr. Smith provides a vast knowledge of charter schools and the importance of charter schools and their service to the community.

The Governing Board is committed to advancing Somerset Academy's mission and increasing academic achievement. The Board's focus will be on student achievement and will act strategically to recruit outstanding school leader and creating a strong partnership with those school leaders. The Governing Board will have the capacity to fulfill its requirements and support the school's mission by continual professional development through a variety of sources including Arizona Charter Schools Association, Arizona State University Lodestar Center for Philanthropy and Nonprofit Innovation, and legal counsel.

The Governing Board also will have two advisory committees to assist with making sound, reasonable, and decisions that always puts the school and its mission first.

### **Advisory Bodies**

Somerset Finance and Strategic Planning Committee: The Finance & Strategic Planning Committee serves as an advisory board to the Governing Board of Directors. They provide non-binding strategic advice and recommendations to the charter school board. The committee consists of the board members, Somerset President, Somerset Vice-president, and school principals, all of which are appointed by the board at a regularly posted public meeting. The committee reviews agenda topics such as facility/ project requests, budget forecasting, special projects, guidance to principals, network growth, future facility reviews, etc. All meetings are open to the public.

School Advisory Council (SAC): SAC will consist of school personnel, parents, students, local business, and community members and reports to the administration of the school. Members will be able to address and vote on pertinent school matters on a regular basis. The SAC's function and purpose is to involve stakeholders in decisions that affect instruction and the delivery of programs.

*B.2.d. Describe a clear and appropriate process for selecting initial governing body members and filling vacancies that result in selecting a governing body qualified to fulfill its responsibilities.*

The initial Board shall consist of five (5) Directors named in the Articles of Incorporation. The number of Directors may at any time be increased or decreased to no more than nine (9) and no fewer than three (3) by a majority vote of the Board. In the event of an increase in the number of Directors, the additional directorships created shall be filled in a manner proscribed herein for the election of Directors. The Directors of the Corporation shall be elected by the Member and shall serve for a term determined by the Member. Any member of the Board may be removed from office with or without cause. Any vacancies created by the removal of a Director in accordance with this shall be filled. A Director may resign at any time by delivering written notice to the Board. A resignation is made effective when notice is delivered unless the notice specifies a later effective date. If a resignation is made effective at a later date, the Board may fill the pending vacancy before the effective date, if the Board provides that the successor does not take office until the effective date. No reduction of the authorized number of Directors shall have the effect of removing any Director before that Director's term of office expires.

The board will maintain odd number for voting purposes and fifty percent (50%) of the Directors then-in-office plus one (1) of the Directors then-in-office shall constitute a quorum for the transaction of business. The Board will also ensure compliance with the Arizona Open Meeting Law.

### **Filling Board Vacancies**

Since the Governing Board is an existing entity and has already been established, the Governing Board will recruit members as vacancies arise, and will endeavor to fill these vacancies with those who will commit to forward the mission of the School. Board members will agree to oversee the operational policies, and ensure academic accountability and financial accountability of the School as well as participate in charter school governance training and successfully undergo a background check by the Sponsor, as specified by law.

The Somerset Academy Arizona, Inc. Board is diverse and highly qualified to deliver the proper oversight of all aspects of school operations and replication. Somerset Academy Arizona, Inc.'s Board includes individuals with vast amounts of legal, financial, educational, business management, human resources, and parental experience. All board members are required to complete at least four hours of professional development, annually. As Somerset Academy Arizona, Inc. operates in Arizona, the Board will receive additional training to understand and stay updated with Arizona charter school laws and statutes and the unique charter school landscape within the state of Arizona. The Somerset Academy Arizona, Inc. board will receive training in the Quality Standards: Governance provided by the Center for Student Achievement to enable the Board to maintain appropriate oversight over the financial, operational, regulatory, school leader support and evaluation, board composition and structure, open meeting laws, goals and accountability, and academic performance<sup>1</sup>. If necessary, the Board will receive additional professional development essential to help guide them through the necessary elements of any corrective action plan it develops to address underperformance. The Somerset Academy Arizona, Inc board understands that Board Governance is essential to achieving student academic success.

Governing board recruitment is a priority to ensure the continuing sustainability of the organization. In order to fill a vacancy, the board shall announce the vacancy to the public, including Somerset's parents, teachers, and schools, and invite applications from qualified persons all as described by the board. Board members are encouraged to solicit applications from qualified persons. The Chairman, or another Board member approved by the Board, shall conduct an initial review and evaluation of all applications based on their skills, background, and alignment with the vision and mission of the school. Essential characteristics used in evaluating potential new board members is summarized as follows:

A member of the Somerset Academy of Arizona Board of Directors ("Board") shall have a firm belief in the **"Neighborhood School" Philosophy** (Somerset schools share a common philosophy of student expectations, a unique code of excellence, an expectation of parental commitment, and collaborative management infrastructure derived from the inception of its first school, Somerset Neighborhood.) delivery format and shall be committed to using the curriculum as approved by the board. Members of the Board ("Directors") shall be fully committed to the charter school concept. The purpose of the Board is to set the general direction and policy of the school, not to manage it on a daily basis. Directors shall be able to

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<sup>1</sup> Center for Student Achievement. (2017). *Quality Standards Self-Assessment Workbook for Schools*. <http://centerforstudentachievement.org/quality-standards/governance/>; Last Accessed August, 2018.

govern in a manner to ensure adherence to the Somerset Academy of the West Valley's vision and mission statements. Furthermore, directors shall foster positive relationships with school personnel, the school community, and community at large, oversee the financial stability of Somerset Academy of the West Valley, and deal with school related issues as prescribed in the bylaws.

## **QUALIFICATIONS**

- Have knowledge and agree with the principle that the "Neighborhood School" Philosophy helps the student retain information longer and with greater clarity.
- Commit to making governance decision in alignment with the Somerset mission and vision.
- Understand the curriculum that has been approved by the board.
- Be in agreement with the educational philosophy, discipline policy, and administrative structure of Somerset Academy Arizona, Inc.
- Have the aptitude and readiness to contend with ethics, principles, and long term strategic planning.
- Disposition to delegate and share decision making with respect for all members of the board.<sup>2</sup>

Prior board experience is helpful but not required. Placing a high value on professionalism and the success of the school is mandatory. Motivation for serving on the board shall be to facilitate the educational success of students.

Directors shall fulfill their board and committee responsibilities to their fullest capability. All directors should remember that being a public relations representative is one of their key roles.

## **BEHAVIORAL EXPECTATIONS**

Directors shall abide by the open meetings law A.R.S. § 38- 431.01(A). The open meetings law states that anyone discussing board business, policy, actions, resolutions, etc. amongst three or more directors, except at meetings for which notice has been properly posted at least 24 hours prior to the meeting, is illegal. "Meeting" with another director is defined as communication in person, by telephone, by electronic mail, or through any other means. Executive sessions and confidentiality laws are also outlined in the statute. Personnel matters, individual students, and negotiations are confidential by law and may be conducted in executive session.

Expectations include a professional demeanor at all board and school functions. Issues being discussed shall not be personalized and directed toward a fellow director, Somerset Academy Arizona, Inc. or school personnel, parent or anyone else. Discernment should be used in interpersonal relationships and communications.

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<sup>2</sup> Carver, John. (2006). *Boards That Make a Difference a New Design for Leadership in Nonprofit and Public Organizations*. Third Edition. San Francisco, CA: Jossey-Bass.

A diversity of opinions and solutions are necessary for the effective governance of Somerset Academy Arizona of the West Valley; however, directors shall respect and listen to ideas being presented by another director. Directors shall encourage each other to fulfill their responsibilities to the fullest of their potential.

When receiving criticism from parents or other parties about school personnel or other directors, the director shall direct the speaker to the director / personnel, which the situation involves. Directors shall never speak negatively about school personnel or other directors to the school community, or parties outside the school community.

Conflict shall be resolved by those between whom it exists. Directors will commit to resolving conflict directly with each other or with the appropriate school personnel and not share the conflict with anyone outside of the conflict except as necessary to follow the approved conflict resolution policy of Somerset Academy Arizona, Inc., including, but not limited to, other parents, other school personnel, or the media.

Directors shall exemplify integrity, honesty, and respect. A dedication and commitment to the vision of Somerset Academy of the West Valley and the charter school movement shall be top priority for any directors. Any director finding himself or herself involved in an irresolvable conflict shall put the vision and interest of the school first.

Directors are expected to attend all board meetings unless excused. A director missing more than two consecutive board meetings without prior approval for their absence from the Board Chairperson or at least two other directors shall receive a notice of probation. Missing a third meeting without prior approval is considered a resignation by that director.

Chairperson or at least two other directors shall receive a notice of probation. Missing a third meeting without prior approval is considered a resignation by that director.

All board meetings shall be governed according to appropriate parliamentary procedure.

He/She will then report to the Board. Following review and discussion of the applications, the Board will proceed to elect a new member. Any one of the Board of Directors may also make a nomination. New members shall be elected by a vote of the majority of the existing Directors although less than a quorum.

The Applicant's Bylaws clearly specify the selection, removal procedures, and term limits of Board Members, and is summarized as follows:

**Selection:** Directors shall be elected at a duly organized meeting of the Governing Board. Notice of the Governing Board's intentions to elect any such Director shall be included in the agenda for that meeting and publicly announced. Newly created directorships resulting from an increase in the number of directors comprising the board and all vacancies occurring on the board for any reason shall be filled by the majority of the members in office at a duly organized meeting of the Governing Board. A member elected to fill a newly created directorship or a vacancy will serve until a successor is elected. Newly elected members will agree to support the founding organization's vision in order to maintain continuity between the founders and the subsequent board members.

Removal Procedures: A Director may be removed without cause.

Term Limits: Each member of the Board of Directors shall have a term of five (5) years and may only be elected for up to three (3) consecutive terms. Upon serving the maximum term, a Director's term shall automatically expire without further action of the Board.

*B.2.e Be consistent with all sections of the application package.*

This section is consistent with all sections of the application package.

**B.3**

# **Management & Operation**

## **B.3 Management & Operation**

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*B.3.a 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.*

The Somerset Academy Arizona, Inc. Governing Board is the ultimate policy-making body with the responsibility of operation and oversight of the school including but not limited to academic direction, curriculum, and budgetary functions. The school principal, hired by the board, will be responsible for all aspects of school operations within the scope of operating policies and procedures and budgetary functions as adopted and approved by the Governing Board. The school's faculty and staff will report directly to the principal, who shall report to the Governing Board.

The School's on-site administration (principal, an assistant principal and/or lead teacher) will ensure that the operations of the School (resources, courses, policies) are in accordance with the mission and vision of the School as adopted and approved by the Governing Board. The administrative staff, as instructional leaders, will make all school-based decisions, establishing and implementing procedures for the day-to-day operations of the School. The faculty and secretarial staff will be responsible for carrying out these procedures in their daily activities and interactions with students, parents and the community.

Below the responsibilities, skills, and experiences of the school leaders are explained in detail as well as how they impact the operational plan for the school.

Somerset Academy of the West Valley will open with 264 students in year one and grow to 506 students within three years. For this size school, the staff members in a position of management will include the Principal and Exceptional Student Education Teacher/Specialist the first two years with an addition of an Assistant Principal by the third year.

### **SCHOOL PRINCIPAL**

#### **Qualifications:**

- Education: An earned master's Degree (or higher) from an accredited college or university
- Experience Required: A total of five (5) years of school experience is required; which includes a minimum of three (3) years of required experience as a Principal/Assistant School Principal; Valid Arizona Certification in School Principal, or Professional School Principal.

**Reports to:** School Governing Board

**Supervises:** All Administrative, Instructional, and Non-Instructional staff at the school.

**Position Goal:** To provide the leadership and management necessary to administer and implement all programs, activities and policies essential to ensure high quality educational experiences and services for all students in a safe, nurturing, and enriching environment. To ensure that the mission and vision is being implemented consistently.

#### **Essential Performance Responsibilities:**

##### *Leadership*

- Administer, control, and supervise the instructional program of the school operations and school personnel.
- Encourage teachers and pupils to perform to the best of their ability.

- Interpret the educational program of the school and school system to the community.
- Provide leadership and direction for all aspects of the school's operation.
- Facilitate frequent communication with parents of the school community.
- Coordinate and adapt school curricular programs and policies.
- Assume responsibility for the buildings, grounds, equipment and supplies of the school; supervise the work of the custodians and maintenance staff; report to the governing board the conditions and needs of the school.
- Keep accurate account of all money paid to the school and record the purpose for which it was paid.
- Supervise and coordinate the budgetary process.
- Coordinate and conduct the interview process and make hiring and termination decisions for all staff.
- Develop and supervise New Teacher programs.
- Compile and prepare all student achievement outcomes.
- Report directly to the Governing Board for all purposes.
- Coordinate, supervise, and conduct the evaluations of all staff.
- Oversee the School Advisory Council.
- Maintain a positive and productive relationship with the Parent-Teacher Association.
- Supervise all students and staff making sure to maintain the "family-like" environment/culture of a Somerset school
- Coordinate and supervise the testing and assessment program.
- Enforce the discipline plan and assist teachers with all concerns and issues related to student behavior.
- Serve as final arbitrator for serious discipline problems in accordance with Sponsor and Board's policy and state statutes.
- Establish, actively pursue, and monitor a school mission, vision and goals in collaboration with staff, parents, students, and other stakeholders that are aligned with the Board's mission and goals.
- Supervise and coordinate school-wide programs, curricula and course options.
- Supervise and coordinate student registration, scheduling, and master scheduling construction.
- Oversee the grade reporting system.
- Monitor substitute teachers and the class coverage process.
- Supervise school activities and special events, and initiate fundraising activities.
- Establish business partnerships and positive relationships with community leaders.
- Maintain a master schedule of all school activities and events, including extracurricular trips.
- Coordinate and schedule the use of facilities for all events.
- Implement and enforce attendance and tardy policies and procedures for all students.
- Exercise proactive leadership in promoting the vision and mission of the school.
- Model and maintain high standards of professional conduct.
- Set high standards and expectations for self, others, and school.
- Provide leadership in the implementation of state mandated assessments designed and adapted to measure student achievement.
- Maintain active involvement in the school improvement planning process with the School Advisory Council by providing resources for decision making and priority setting.
- Use quality improvement principles and process in daily administration of school.
- Implement procedures and policies that ensure a safe and orderly learning environment.

- Anticipate difficult situations and develop plans to handle them.
- Manage and administer the development, implementation and assessment of the instructional program at the assigned school so as to ensure student growth and achievement is continuous and appropriate.
- Use collaborative leadership style and quality processes to involve stakeholders
- Provide leadership and direction for all aspects of the school's operation.
- Build teams to accomplish plans, goals and priorities.
- Conduct staff meetings to discuss policy changes, instructional programs, potential problems and resolution of existing problems.
- Use appropriate interpersonal styles and methods to guide individuals or groups to task accomplishment.
- Act quickly to stop possible breaches of safety, ineffective procedures, or interference with operations.
- Communicate effectively both orally and in writing with parents, students, teachers and the community.
- Communicate school information, goals, student learning and behavior expectations to stakeholders.
- Develop and maintain a school atmosphere conducive to learning and student achievement.
- Maintain visibility and accessibility on the school campus and at school related activities and events.
- Establish procedures used in the event of school crisis and/or civil disobedience and provide leadership in the event of such incidents.
- Provide leadership to involve the school in quality initiatives.
- Establish procedures for an accreditation program and monitor standards to ensure they are met.
- Provide for the articulation of the school's instructional program among school personnel.
- Use effective communication techniques with students, teachers, parents and stake holders.
- Communicate, through proper channels, to keep Board of Directors informed of impending problems or events of an unusual nature.

#### *Information & Analysis*

- Address the diverse needs of the school population consistent with the Board's policies and Strategic Plan.
- Use current research, performance data, and feedback from students, teachers, parents and community to make decisions related to improvement of instruction.
- Provide leadership and direction for the implementation and evaluation of curriculum and instruction at the school.
- Analyze and use data for decision-making to improve actions, plans, and processes.
- Access, analyze, interpret and use data in decision-making.
- Use key information such as benchmarks and comparison data in the analysis of results to effectively measure performance.
- Make data accessible to all stakeholders

#### *Strategic Planning*

- Develop long and short- term plans and goals within a School Improvement Plan, aligned with the strategic plan of the Board.
- Collaborate and provide resources to ensure the development of a School's Improvement Plan.

- Communicate overall School Improvement Plan requirements to all staff so each employee can understand how the goals and plans relate to his/her work.
- Allocate resources consistent with implementation of a School Improvement Plans.
- Utilize a systematic process for collecting input from stakeholders and incorporates customer requirements in development of School Improvement Plan.
- Establish procedures to monitor processes, activities and responsibilities and respond to feedback.
- Establish and coordinate procedures for student, teacher, parent and community evaluation of curriculum.
- Direct the development of the master schedule and assign teachers according to identified needs.
- Facilitate the horizontal and vertical articulation of curriculum within the school as well as between the school and its feeder system.
- Oversee the selection and acquisition of instructional materials and equipment
- Collect input and analyze data to develop goals.
- Set high goals and standards for self, others and the organization.
- Provide recognition and celebration for student, staff, and school accomplishments.

#### *Community Engagement*

- Facilitate a program of family and community involvement.
- Develop positive relationships with students, parents, teachers, community.
- Work with parents to resolve complaints or concerns.
- Develop and maintain positive school/community relations and act as liaison between the two.
- Promote/market the school and its priorities to the community
- Establish processes and methods to respond to valid customer requirements.
- Facilitate, coordinate, and monitor the implementation of Student Education programs and services.
- Implement procedures to ensure that rights of children with disabilities and parents of such children are protected.
- Interact with government and service agencies relative to student welfare.
- Establish processes to determine customer needs and level of satisfaction.
- Establish guidelines for desirable student conduct and follow suspension and expulsion policies and procedures.
- Supervise the implementation of the school's student services plan, including guidance, drop-out prevention, health services, attendance and related areas.
- Take appropriate reporting and/or referral action whenever abuse situations are recognized.
- Provide leadership support for community involvement programs and business partnerships at the school level.
- Direct and develop the recruitment of Business Partners to benefit the school and community.
- Develop activities with business partners that promote student achievement.

#### *Human Resources*

- Manage appropriately and professionally personnel issues, including hiring, evaluations, staff deficiencies and retention; provides feedback on professional performance and offer assistance to strengthen weaknesses in performance.

- Interview and select qualified personnel
- Establish job assignments, supervise all assigned personnel, and conduct performance evaluations in accordance with current board policies and legislation.
- Delegate responsibilities to appropriate staff members.
- Make difficult personnel decisions according to policy when necessary including dealing with ineffective teacher or other staff performance.
- Establish and maintain individual professional development plans for each instructional employee that is linked to student achievement.
- Assign tasks and supervise personnel in task accomplishment including special projects.
- Analyze data and information to plan staff development to accomplish school goals.
- Complete annual Needs Assessment to determine staff development needs.
- Lead and manage development of personnel through staff development, in-service and other developmental activities that are linked to student achievement gains and the school improvement plan.
- Facilitate the development and implementation of an effective staff development program.
- Participate, successfully, in the staff development programs offered to increase the individual's skill and proficiency related to the assignment
- Build a school community and environment, which supports learning and growth for everyone toward realization of the school's mission.
- Participate in Governing Board management meetings and other activities to enhance professional development.
- Serve as a coach/mentor to assistant principals/lead teachers or others who are preparing for School Principal certification.
- Review current developments, literature and technical sources of information related to job responsibility.
- Use team approaches in solving problems and improving processes and providing frequent feedback to those involved in improvement efforts.
- Consider data and results from action research when solving problems and improving processes.
- Contribute to positive staff morale through flexibility, support and recognition of groups and individuals working toward school improvement.
- Consider the aspirations of self and others in relation to the jobs and tasks assigned when assessing expertise and developmental needs.

#### *Operations*

- Manage and supervise the school's financial resources, including the preparation and disbursement of the school's budget and internal accounts.
- Establish and manage student accounting and attendance procedures at the school.
- Coordinate and manage the extracurricular student activities and funds at the school.
- Show positive trends in the achievement of improvement goal results in the areas of Operation, business practices (efficiency) and customer satisfaction.
- Demonstrate readiness and confidence in making and/or sharing decisions with those involved in a timely fashion.
- Employ an improvement cycle for operational problems that analyzes results, identifies root causes and takes corrective action.
- Supervise and monitor the accurate completion of data collection and submit resulting reports according to timelines.

- Coordinate school maintenance and facility needs and monitor progress toward meeting those needs.
- Identify quality requirements of materials/services and communicate this information to parents, community and suppliers.
- Access Sponsor and community resources to meet school needs.
- Coordinate plant safety and facility inspections at the assigned school.
- Monitor the maintenance at the school to ensure a safe, clean, and healthy, learning environment.

## **TEACHER**

### **Qualifications:**

- Education: Bachelor's degree from an accredited college or university; Certifications: valid Arizona certification in the subject area.
- Experience Preferred: Two (2) years of successful classroom experience in the appropriate subject area.

### **Reports to:** Principal

**Position Goal:** To create and maintain a classroom atmosphere that generates high expectations and enthusiasm for learning by infusing critical thinking skills, application skills, interpersonal skills, and technology into an aligned curriculum and assessment process, resulting in measurable achievement gains for all students.

### **Skills and Abilities:**

- Possess knowledge of curriculum and state Standards in the appropriate subject area.
- Be able to adapt, design and implement curriculum to meet the needs of the individual students.
- Be able to suggest educational and classroom management strategies, materials and techniques to parents and other support personnel working with students.
- Be able to use observation techniques for identification, ongoing re-evaluation and planning for students.

### **Essential Performance Responsibilities:**

#### *Demonstrate Proficiency*

- Demonstrate mastery of all state competencies.
- Demonstrate knowledge and understanding of the subject matter
- Foster students' achievement gains from baseline assessment levels to be evident in pre/posttest comparison results, standardized test scores, and portfolios
- Assist the administration and staff to develop and implement a school-wide behavior management system aligned to the Board's policies and procedures
- Provide supportive classroom management and academic strategies to teachers, students, and parents.

#### *Demonstrate Proficiency*

- Demonstrate efficiency, punctuality, and consistent attendance
- Review current developments, literature and technical sources of information related to job responsibility.
- Initiate and present innovative ideas for special projects, school functions, field trips, extracurricular activities, and clubs
- Initiate opportunities for professional development
- Provide supplemental instruction.

#### *Participate in Continued Professional Development*

- Demonstrate oral and written proficiency
- Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignments
- Pursue further education and supplemental credentials.

*Employ variety of educational technologies, strategies & teaching styles*

- Employ differentiated instructional strategies to maximize learning.
- Consistently maintain portfolios (dating and ordering each piece).

*Serve as role models for students and future teachers*

- Role model using the state competency checklist.
- Promote problem-solving skills and character education.
- Promote and enforce school rules.

*Advise parents*

- Keep parents updated through interim reports, report cards, phone calls, and notes home.
- Encourage and facilitate parental and community involvement promoting student achievement.
- Document parent phone calls, conversations, and conferences
- Work as partners to create behavior modification plans and create Progress Monitoring Plans (PMP) for students.
- Maintain flexibility and frequent contact with parents about student progress and school events.

*Demonstrate awareness of each student's educational needs*

- Continually assess students' development through clearly defined rubrics.
- Establish, maintain, assess, and (if needed) modify individual student progression plans.
- Identify those students who exhibit exceptional thinking styles and behaviors and implement and/or accommodate those exceptional needs.
- Assist in data collection and preparation of reports including individualized educational plans of instruction for students.

*Work cooperatively and productively with co-workers*

- Interact with maturity and professionalism among administration, staff, and students at all times.
- Take initiative to implement projects, programs, and/or compensate for shortcomings within classroom and/or the school environment.
- Exhibit congeniality among co-workers, students, and parents.
- Show assertiveness - delegate when necessary.
- Be a team player while respecting others differences.
- Separate professional and personal spheres.
- Be flexible - always have a back-up plan.
- Be willing to help where help is needed.

*Follow guidelines regarding safety and education*

- Supervise student recreation (having at least one person in the classroom at all times).
- Complete and maintain accident reports (keeping one in a permanent file and sending one copy to parents).
- Keep emergency numbers at hand and a stocked first aid kit accessible in classroom.
- Maintain up-to-date lesson plans within curriculum guidelines.
- Complete, distribute, and maintain files of all behavior and homework referrals as required (one in permanent folder, one sent home).
- Complete and maintain files of all report cards, interim reports, and county test records,
- Follow safety requirements regarding aisles, doorways, fire alarms, and fire extinguishers at all times.
- Participate in monthly fire and other safety drills.
- Keep dangerous objects (knives, rocks, etc.) and toxic substances (ammonias, medicines, etc.) out of the reach of children at all times.
- Follow appropriate County medication guidelines for all students (remember never to give Tylenol, cough drops, or any prescription medications without the written consent of the parent and administrator and accompanied by the appropriate medical forms).

*Participate actively in school functions*

- Attend parent/teacher meetings and conferences.

- Plan and participate in special events.
- Perform other duties as assigned by the Principal.

### **EXCEPTIONAL STUDENT EDUCATION SPECIALIST/TEACHER**

#### **Qualifications:**

- Education: An earned bachelor's Degree (or higher) from an accredited college or university and a certification in Exceptional Student Education areas.
- Experience Required: A total of five (5) years of successful instructional experience in Exceptional Student Education

**Supervises:** Teachers and clerical personnel, as assigned.

**Position Goal:** Conduct staff development activities designed to ensure a free and appropriate public education for all students with disabilities. This position will also assist the School Administrator in managing all ESE functions within the school and will ensure compliance in all areas of ESE.

#### **Essential Performance Responsibilities:**

- Coordinates the referral, staffing, placement and re-evaluation process for exceptional student education at the school level, i.e., initials, IEP reviews, transfers, verification of placements
- Directs the use of all forms at the school level including referral and placement forms, IEP's, data entry, FTE, etc., in preparation for staffing's/meetings
- Maintains records and procedures specific to Exceptional Student Education for compliance purposes
- Serves as LEA (Local Education Agency) Representative at the Speech and Language staffing's and IEP meetings
- Acts as a resource to the school personnel regarding ESE rules, regulations, compliance requirements, program needs, school responsibilities, positive behavioral supports, discipline concerns, functional behavior assessments, behavior intervention plans, and

other ESE related concerns including implementation of Individuals with Disabilities Education Act

- Assists schools in implementing all processes required for the FTE survey weeks and the federal count
- Provides periodic monitoring of Matrices, IEPs, re-evaluation dates and any other date specific requirements to ensure compliance for audit surveys
- Collaborates with school personnel and others for the development, coordination and implementation of appropriate staff development, e.g., workshops, updates, in-service, conferences, etc.
- Monitors the extent to which students' educational goals are being met in accordance with those outlined in the student's IEP
- Prepares and submits appropriate comprehensive written reports that include interpretation and synthesis of assessment data and other sources data upon request
- Assesses the needs of school-based ESE teachers and programs
- Mentors and demonstrates effective teaching strategies to ESE teachers
- Assists schools in the decision-making process required for determining accommodations for students with disabilities participating in standard or alternative assessment
- Serves as liaison between school personnel, i.e., the guidance department, the administrators and the ESE staff
- Develops and implements activities promoting inclusive practices
- Attends workshops, conferences and meetings necessary to maintain and update professional knowledge.
- Provide services and assistance to special education students based on the students' IEPs.

### **REGISTRAR / OFFICE MANAGER / RECEPTIONIST**

#### **Qualifications:**

Education: Standard high school diploma or satisfactory completion of an approved General Educational Development (GED) Program.

Skills: A well-rounded knowledge of clerical methods, procedures, and business office practice; must be computer literate. Computer skills as required for the position. The hiring administrator may specify preferred, appropriate additional qualifications as may be related to the job.

Experience: One (1) year of previous school-work experience which demonstrated an expertise to perform various procedures and applications of a repetitive and routine nature following standard practices.

**Reports to:** Administrator/ Principal designee

**Position Goal:** To perform a wide variety of clerical duties with respect to registering students, processing and maintaining student records, and otherwise working with student schedules and data in a responsible and accurate manner.

#### **Essential Performance Responsibilities:**

- Process required forms and information to enroll new students and discuss the process with students and parents
- Manage all student information in SIS system
- Maintain cumulative folders and permanent record cards in a secure manner
- Prepare various lists and reports in regard to student ranking, grade averages, graduation, reassessments, etc.

- Process withdrawal and transfer of students and verify that student obligations are settled
- Receive and mail transcripts and other requested records, as authorized, and prepare related correspondence
- Follow instructions and established policies and procedures to perform specialized registrar duties referring questionable matters to the Guidance Director or Administrator
- Review students' immunization forms to verify adherence to governmental requirements
- Operate standard office equipment such as any generation of computer, calculator, word processor, etc., as well as equipment developed or advanced from future technology as required by the job
- Answer phones and assist parents (in a friendly manner) with questions directing specific questions to the appropriate departments/person when necessary
- Conduct school tours when the principal is unavailable
- Interact effectively with the general public, staff members, students, teachers, parents, and administrators, using tact and good judgment
- Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment
- Review current developments, literature and technical sources of information related to job responsibility
- Ensure adherence to good safety procedures
- Perform other duties as assigned by the Principal or designee.

### **Instructional Assistants**

#### **Qualifications:**

**Education:** A College Associates Degree; **Experience:** Experiencing in working with age appropriate children preferred

**Skills:** The Paraprofessional will effectively perform the performance responsibilities using the following skills and abilities:

Relate and work with students and adults in a positive manner, work cooperatively with colleagues follow written and verbal instructions, perform clerical tasks, maintain flexibility and confidentiality, demonstrate effective oral and written communication skills, basic English and mathematics skills, basic knowledge of technology and ability to apply knowledge to assigned areas of responsibility, and knowledge of operation of office and audio-visual equipment.

**Reports to:** Supervising teacher, Principal or designee

**Position Goal:** To assist, support and work closely with teachers, administrators, and other team members in providing a quality instructional program for students.

The Paraprofessional shall:

#### **WORK HABITS**

- Observe assigned work hours.
- Maintain a pattern of prompt and regular attendance.
- Follow the daily schedule as prescribed.
- Adjust to work assignments and/or schedule changes.

## **PERFORMANCE RESPONSIBILITIES**

- Work with individual students or small groups of students to reinforce learning of materials or skills initially introduced and outlined by the teacher.
- Provide extra assistance to students with special needs, such as non-English-speaking students or those with physical and/or mental disabilities.
- Assist as directed by the teacher in the effort to successfully maintain students with special needs in an integrated setting, as determined by the IEP team.
- Assist the teacher in preparing materials and equipment for direct instructional activity, including locating, copying, collating, distributing and/or grouping materials to support instructional activities planned by the teacher.
- Assist with bulletin boards and decorations for instructional purposes and for special events.
- Supervise students in classrooms, halls, cafeterias, school yards, and gymnasiums, or on field trips.
- Perform assigned non-instructional classroom duties, such as snack time, toileting, and clothing routines.
- Serve as a source of information and help to any substitute teacher assigned to the class.
- Attend staff meetings, and serves on committees as required.
- Perform other duties as assigned by the teacher, principal, or designee.
- Demonstrate ethical behavior and confidentiality of information about students in school environment and community.
- Maintain a cooperative working relationship with principal, supervising teacher, students, parents, staff, and public.

## **TRAINING**

- Participate in professional learning activities which align with school improvement goals.
- Participate in staff development opportunities provided by the county.

### **Clerical**

#### **Qualifications:**

**Education:** Standard high school diploma or satisfactory completion of an approved General Educational Development (GED) Testing Program. Vocational or business school Secretarial Science training preferred

**Preferred:** Proficiency in shorthand. Bilingual skills. Extensive knowledge of business practices, policies, and procedures; ability to handle a variety of tasks simultaneously; good organizational skills, public relation skills, ability to take dictation and an excellent command of English grammar. The hiring administrator may specify preferred, appropriate additional qualifications as may be related to the job.

**Experience:** Three years of related secretarial experience.

**Reports to:** Principal or Immediate supervisor

**Position Goal:** To provide a wide variety of skilled secretarial services involving good judgment to assist supervisory personnel of routine office procedures.

### **Essential Performance Responsibilities:**

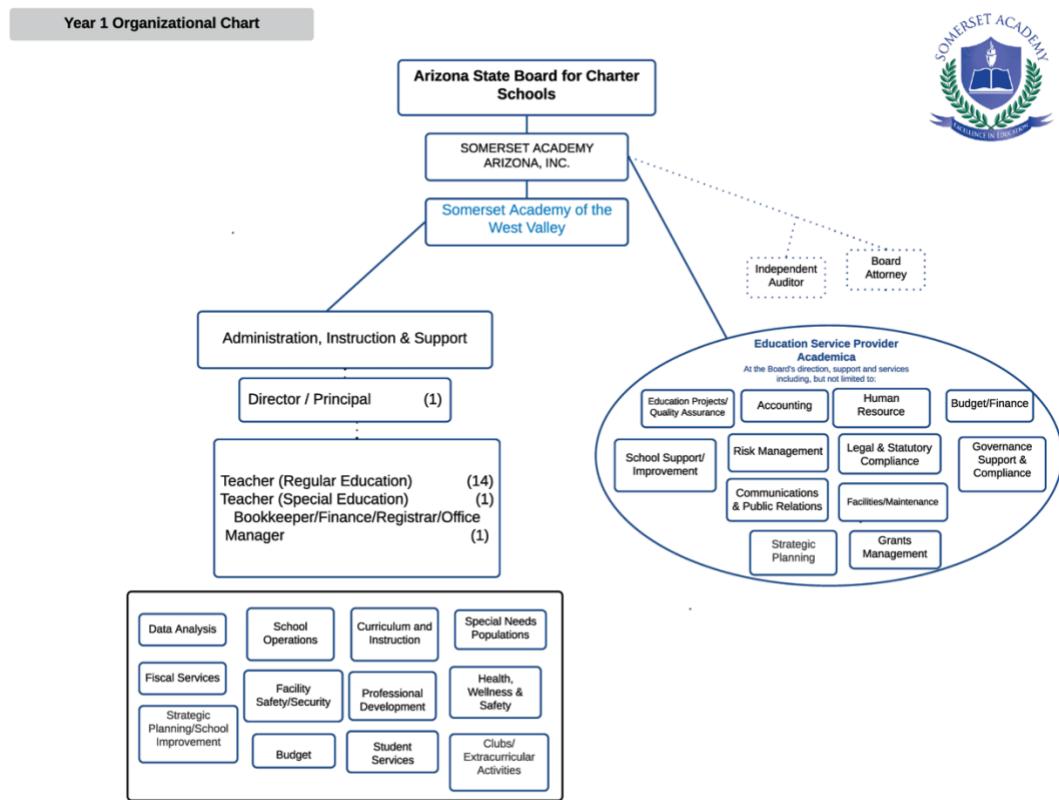
Clerical shall:

- Follow instructions to perform advanced secretarial/clerical duties
- Screen callers, set up appointments, arrange meetings, and disseminate requested information appropriately
- Take dictation, attend meetings, type all correspondence, articles, reports, manuals, and workshop

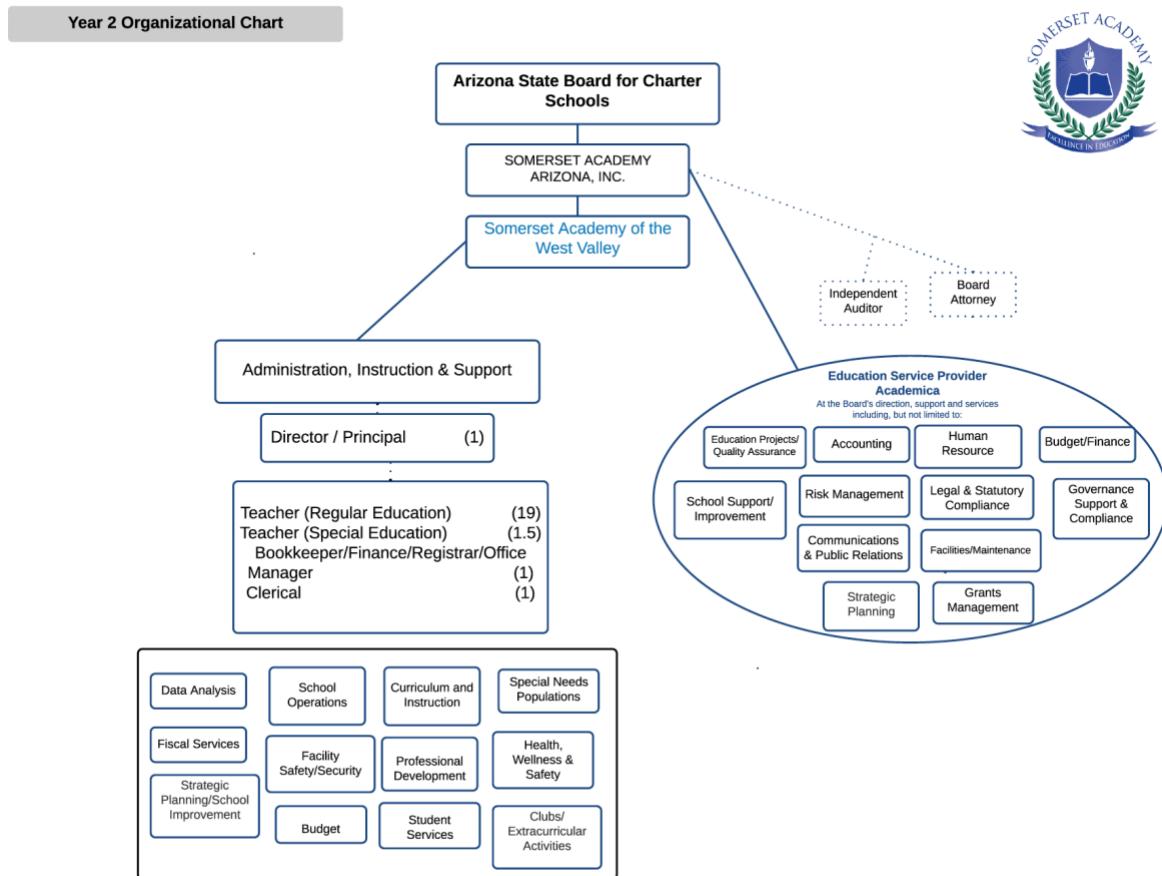
materials

- Assist in the preparation of the department budget and draft correspondence in response to inquiries
- Prepare, examine and verify statistical and confidential reports for completeness and accuracy of computation; determine conformity to established requirements and personally verify that any discrepancies are eliminated
- Maintain and update all case files of employees in the Employee Assistance Program, files f general correspondence and business documents, and treatment resource files.
- Open, date, and distribute all mail, memorandums, etc
- Exercise responsibility, discretion and independent judgment in resolving office problems relating to EAP client behavior
- Meet and deal effectively with the general public, staff members, supervisory personnel, clients, agencies and/or mental health practitioners, using tact and good judgement
- Operate standard office equipment such as any generation of typewriter, calculator, CRT terminal, microcomputer, word processor, duplicator, etc., as well as equipment developed or advanced from future technology
- Participate, successfully, in the training programs offered to increase the individual's skill and proficiency related to the assignment
- Review current developments, literature and technical sources of information related to job responsibility
- Ensure adherence to good safety procedures
- Perform other duties assigned by the administrator

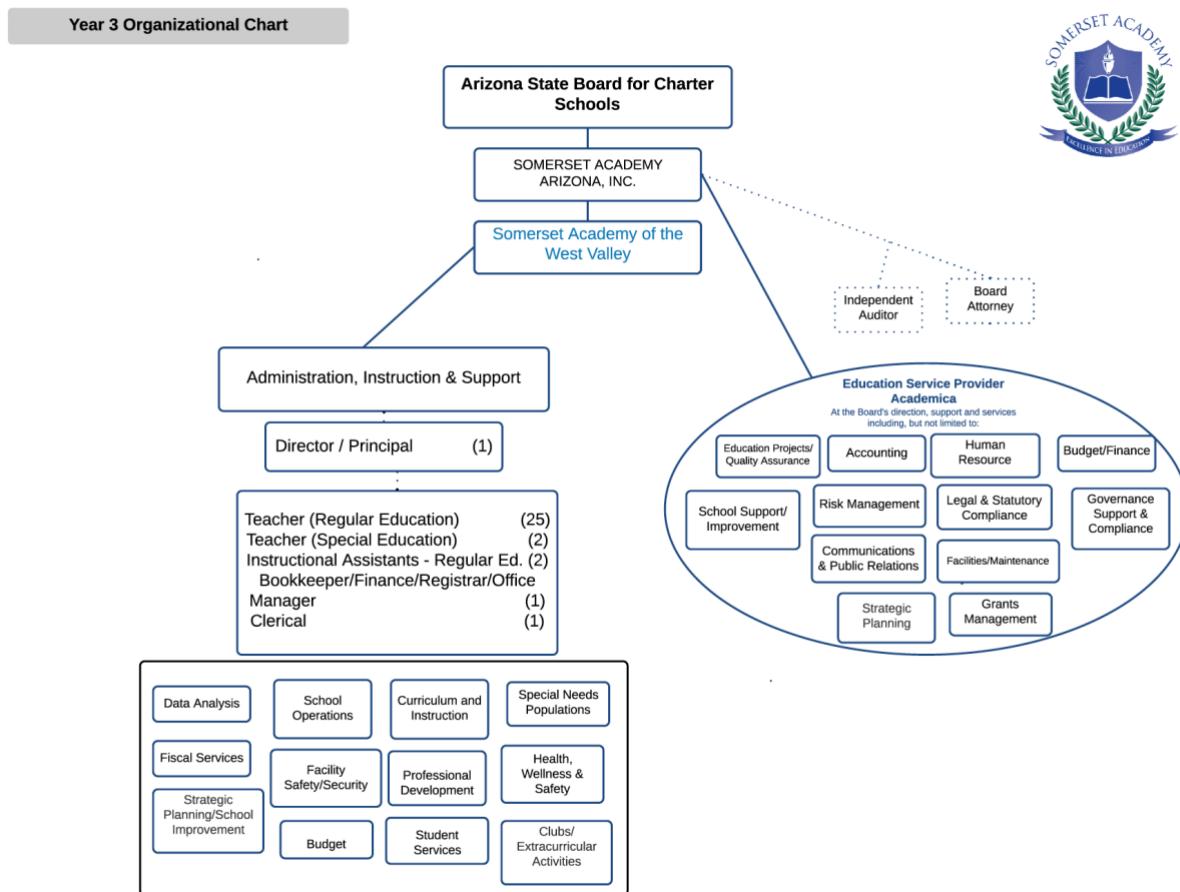
**Figure B.3.1 Year 1 Organizational Chart (expected enrollment 264)**



**Figure B.3.2 – Year 2 Organizational Chart (expected enrollment 374)**



**Figure B.3.3 – Year 3 Organizational Chart (expected enrollment 506)**



*B.3.b 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 flowing areas:*

The School Principal handles all oversight responsibilities at the school campus. The School Principal will provide the leadership and management necessary to administer and implement all programs, activities and policies essential to ensure high quality educational experiences and services for all students in a safe, nurturing, and enriching environment. This will be conducted in a manner that ensures that the mission and vision is being implemented consistently. Please see Table B.3.1 below for more specific details.

**Table B.3.1 Administrative Plan with Oversight Responsibilities**

<b>Area of Oversight &amp; Responsibilities</b>	<b>Administrative Staff</b>	<b>Example of Responsibilities</b>
Instruction	School Principal	<ul style="list-style-type: none"> <li>- Select school curriculum &amp; resources</li> <li>- Recruiting and hiring instructional staff and assistants</li> <li>- Evaluating performance of instructional staff</li> <li>- Ensure that the mission and vision is being implemented consistently by all instructional staff</li> <li>- Provide leadership and mentorship to instructional staff and assist/mentor in all aspects of instruction</li> <li>- Use current research, performance data, and feedback from students, teachers, parents and community to make decisions related to improvement of instruction</li> </ul>
Curriculum & Assessment (mandated state testing)	School Principal (and teacher/team leader appointed by School Principal)	<ul style="list-style-type: none"> <li>- Oversees curriculum selection (aligned with state standards), development and implementation</li> <li>- Compile and prepare all student achievement outcomes</li> <li>- Report academic progress to the Governing Board</li>   <li>Mandated Testing including AzMERIT &amp; AZELLA</li> <li>- Coordinate and supervise the testing and assessment program.</li> <li>- Create testing schedule</li> <li>- Report testing results to Governing Board</li> <li>- Access, analyze, interpret and use data in decision-making</li> <li>- Conduct 'data chats' with teachers on individual class basis and school-wide</li> </ul>
Staff Development	School Principal (and teacher/team leader appointed by School Principal)	<ul style="list-style-type: none"> <li>- Develop and supervise New Teacher programs.</li> <li>- Conduct staff meetings to discuss policy changes, instructional programs, potential problems and resolution of existing problems</li> <li>- Manage appropriately and professionally personnel issues, including hiring, evaluations, staff deficiencies and retention; provides feedback on professional performance</li> </ul>

	ESE Teacher/ Specialist	<p>and offer assistance to strengthen weaknesses in performance</p> <p>Facilitate the development and implementation of an effective staff development program.</p> <ul style="list-style-type: none"> <li>- Participate, successfully, in the staff development programs offered to increase the individual's skill and proficiency related to the assignment</li> <li>- Build a school community and environment, which supports learning and growth for everyone toward realization of the school's mission.</li> </ul> <p>ESS Teacher/Specialist – assist principal in staff development relating to ESS rules, regulations, compliance requirements, and other ESS related topics</p>
Financial Management	School Principal and Governing Board	<p><u>School Principal &amp; Governing Board</u></p> <ul style="list-style-type: none"> <li>- Supervise and coordinate the budgetary process</li> <li>- Oversee and coordinate with Governing Board long-term financial planning</li> <li>- Manage and supervise the school's financial resources, including the preparation and disbursement of the school's budget and internal accounts.</li> </ul> <p><u>School Principal</u></p> <ul style="list-style-type: none"> <li>- Oversee all fundraising efforts</li> <li>- Collaborate with contracted services to oversee audit</li> <li>- Supervise procurement policies</li> <li>- Approve all purchase orders and expenditures</li> </ul>
Contracted Services	School Principal	<ul style="list-style-type: none"> <li>- Select and monitor the performance of contracted services such as custodial, building maintenance, and food services</li> </ul>
Personnel	School Principal	<ul style="list-style-type: none"> <li>- Model and maintain high standards of professional conduct</li> <li>- Set high standards and expectations for self, others, and school.</li> <li>- Coordinate and conduct the interview process and make hiring and termination decisions for all staff</li> <li>- Evaluating performance of personnel</li> </ul>
Grants Management	School Principal	<ul style="list-style-type: none"> <li>- Research for federal, state, and local grants on a continual basis</li> <li>- Oversee writing and apply for grants</li> </ul> <p>* The principal may delegate grant writing tasks to others but will oversee the process and submission.</p>
Student Information System (SIS)	Office Manager/ Registrar	<ul style="list-style-type: none"> <li>- Enters the required information into SIS on a daily basis</li> </ul>

*B.3.c Identify critical skills or experiences that will indicate the minimum qualifications for fulfillment of those responsibilities.*

The critical skills and/or experiences as well as the minimum qualifications for each administrative role is provided in detail in [\*\*Section B.3.a.\*\*](#)

*B.3.d Consistency with Application Package*

This section is consistent with all sections of the application package.

**B.3.1**

# **Education Service Providers**

### B.3.1 Education Service Providers

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a) Present a detailed explanation of how contracting with or having a governance relationship with the ESP & e) (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 vision

Somerset Academy Arizona, Inc. will be contracting with an Education Service Provider (ESP) so that the school staff and administration can focus on implementing the school's mission and vision and can concentrate on student achievement. The ESP will ensure that the business operations are maintained and that the governing board is supported. Somerset Academy Inc. schools have contracted with Academica, **an EMO**, for over two decades. With their support, Somerset has been able to grow from its first neighborhood school in a two-room schoolhouse serving 50 students, to operating over 50 charter schools and nearly 18,000 students.

This unique relationship was highlighted in the 2017 Charter Management Organizations report released by CREDO.<sup>1</sup> The report looked at the management arrangement of charter school networks and its effect on student success. They looked at Charter Management Organizations (CMO), in which the charter is held by the CMO, and Vendor Operated Schools (VOS), in which the charters have been granted to a third party who then hires a VOS to provide specified services to the school. They also looked at CMOs that hire a VOS, calling it a Hybrid, and identified Academica managed schools as fitting this model. The study found that students attending a school with a Hybrid management model had an equivalent of 51 additional days in math and an additional 46 days in reading. 78% of the Hybrid students in the study were served by an Academica managed school. This study was done using other definitions of CMO and EMO, and Academica is considered an EMO by Arizona definition.

Academica is one of the nation's longest-serving and most successful charter school service and support organizations. Its mission is to facilitate each Governing Board's vision, which ensures a student-centric focus. Academica has celebrated more than twelve years of success serving charter schools in Florida, California, Texas, Utah, Nevada, Hawaii, Colorado, and Washington D.C. Although Academica has local offices throughout the country working with communities and charter school entities, each is independent of each other. Academica Arizona will model Academica Florida and will be providing services to the Somerset Academy Arizona, Inc. governing board as the charter holder of Somerset Academy of Arizona. Founded in 1999, Academica serviced one of the first charter schools in Florida and was also the first company in the state to seek AdvancED accreditation for the schools it serves, all of which are either fully accredited or in the process of obtaining accreditation.

Academica has extensive experience building new school campuses, retrofitting existing buildings for educational use, and collaborating with national real estate development companies to provide schools in new housing communities. Many facilities have been recognized for "Outstanding Educational Design" by *The American School & University*, a national publication on educational facilities. Academica has extensive experience obtaining financing for charter school facilities working with a network of banks and real estate investment institutions to provide financing and facilities to charter schools. By forming community partnerships, Academica is able to assist the

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<sup>1</sup> Center for Research on Education Outcomes, Stanford University. (2017) *Charter Management Organizations*. Stanford, CA: Woodworth, J., Raymond, M., Han, C., Negassi, Y., Richardson, W., Snow, W.

schools in giving students a rich learning environment. By doing so, these partnerships identify high quality staff, create unique educational environments, develop successful academic programs, and graduate well-rounded students.

By including new client schools in an existing network of over 150 schools and over 70,000 students throughout the country, Academica is able to assist school boards, such as Somerset Academy, Inc. and Somerset Academy Arizona, Inc., in the implementation of successful charter school practices indicative of success with predominantly minority student populations. These strategies and practices provide new schools with a support network that will afford each the ability to maintain thriving, financially viable, and academically high performing programs. Academica's experienced team of professionals provides services and solutions for every aspect of charter school establishment and operation. This team's experience coupled with the success of the school's in the network, proves Academica's organizational capacity to support the proposed school as well as the entire Somerset network.

*b) 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*

Academica serviced schools use a multi-tiered organizational network of management that facilitates cooperation, empowerment, and innovation among the schools and all its stakeholders. While serving a predominately minority and low-income student population on average, this network of charter schools has traditionally outperformed the government run public schools in their respective school districts. These schools have been recognized at the local, state, and national levels for their achievements. Three Academica serviced schools were named 2016 National Blue Ribbon Schools, recognized for their overall academic excellence and progress in closing achievement gaps among student subgroups, and three additional Academica-serviced schools were recognized as 2017 National Blue Ribbon Schools. One Academica-serviced school was ranked 26<sup>th</sup> best high school in the nation in the 2018 U.S. News Best High School Rankings, and six Academica-serviced high schools were ranked in the top 50 high schools in Florida.

The Education Equality Index (EEI) report released by Education Cities, in collaboration with GreatSchools, ranks Hialeah No. 1 and Miami No. 3 among Top-10 U.S. Cities closing the Achievement Gap, or reducing the educational divide between students from low-income families and their more advantaged peers. A total of 14 charter schools from the two cities appear on the list of 20, and 12 of those are serviced by Academica. Additionally, the Somerset and Mater Academy schools earned District accreditation from the Southern Association of Colleges & Schools (SACS) — the first, and only, fully accredited charter school systems in the United States.

During the 2017-18 school year, Academica's Florida office managed 122 public charter schools, please see attachment B.3.1.1 for the list of schools serviced. As a whole, the schools in Florida in which Academica provides services have a student population with a majority of Hispanic/Latino students, similar to schools in Goodyear located within a 2-mile radius of SAWV's proposed location. SAWV's target student population is similar in other categories as well as outlined in

**Table 1:**

**Table 1**

SAWV Target Pop.	Academica Florida	
Am. Ind./AK Nat.	0%	3%

<b>Asian</b>	<b>2%</b>	<b>4%</b>
<b>Black/ Af. Am.</b>	<b>7%</b>	<b>28%</b>
<b>Hisp./Lat.</b>	<b>70%</b>	<b>66%</b>
<b>White</b>	<b>17%</b>	<b>18%</b>
<b>Nat. HI/Pac. Isl.</b>	<b>0%</b>	<b>0%</b>
<b>Multi-Racial</b>	<b>2%</b>	<b>3%</b>
<b>ELL</b>	<b>16%</b>	<b>15%</b>
<b>FRL</b>	<b>81%</b>	<b>62%</b>
<b>SWD</b>	<b>11%</b>	<b>6%</b>

As reported by Florida's A-Plus Academic Accountability System, 75% of those 122 schools managed by Academica's Florida office received either an A or B rating, however please note that Academica does not select or implement curriculum or assessments and is not in charge of student achievement. The table below is a complete list of performance data for all Academica Florida managed schools.

2017-18 School Year Accountability			
District	School Name	Enrollment /FRL%	School Grade/School Improvement Rating
Dade	Mater Academy	1122/89.2%	A
Dade	Mater Academy East Charter School	502/87.6%	A
Dade	Mater Academy East Charter Middle School	167/90.4%	B
Dade	Mater Academy East Charter High School	247/76.3%	B
Dade	Mater Academy of International Studies	536/95.1%	C
Dade	Mater Academy Middle School of International Studies	169/94.1%	A
Dade	Mater Academy High School of International Studies	25/88%	A
Dade	Mater International Academy	165/96.4%	A
Dade	Mater Academy Middle School	1282/84.1%	A
Dade	Mater Academy High School	1742/79.9%	A

Dade	Mater Performing Arts & Entertainment Academy	342/78.9%	A
Dade	Mater Gardens Academy Elementary School	596/50.8%	A
Dade	Mater Gardens Academy Middle School	203/50.2%	A
Dade	Mater Lakes Academy Middle School	848/75.9%	A
Dade	Mater Lakes Academy High School	1281/74.9%	B
Dade	Mater Academy (Miami Beach)	547/67.3%	A
Dade	Mater Grove Academy	707/60.7%	A
Dade	Mater Brickell Preparatory School	170/53.5%	A
Dade	Mater Academy at Mt. Sinai	167/65.3%	A
Dade	iMater Academy	662/88.7%	C
Dade	iMater Academy Middle School	804/88.9%	B
Dade	iMater Preparatory Academy High School	799/87.5%	A
Dade	Mater Academy Bay	480/55.4%	A
Dade	Mater Academy Bay Middle	93/34.4%	A
Dade	Mater Academy Virtual Middle School	NA/26.8%	A
Dade	Sports Leadership and Management Charter Middle School	606/92.6%	D
Dade	Sports Leadership and Management Charter High School	605/87.8%	B
Dade	Sports Leadership and Management (SLAM) Charter Middle School-North Campus	148/95.9%	C
Dade	Ben Gamla Charter School	248/46.8%	A

Dade	City of Hialeah Educational Academy	824/86.4%	A
Dade	Doral Academy	1076/41%	A
Dade	Just Arts and Management Middle School	176/40.9%	A
Dade	Doral Academy of Technology	216/36.6%	A
Dade	Doral Academy Charter Middle School	1189/47.5%	A
Dade	Doral Academy Charter High School	1673/49.9%	A
Dade	Doral Performing Arts and Entertainment Academy	395/44.1%	A
Dade	Theodore R. and Thelma A. Gibson Charter School	153/94.1%	B
Dade	Integrated Science and Asian Culture Academy	183/54.1%	A
Dade	International Studies Charter Middle School	312/76.0%	A
Dade	International Studies Charter High School	404/74.8%	A
Dade	International Studies Virtual Academy	NA	NA
Dade	Miami Children's Museum Charter School	294/34.4%	C
Dade	Pinecrest Preparatory Academy Charter School	604/63.1%	A
Dade	Pinecrest Preparatory Academy Charter Middle School	527/64.1%	A
Dade	Pinecrest Preparatory Academy High School	497/56.1%	A
Dade	Pinecrest Academy South Campus	750/3.1%	A
Dade	Pinecrest Academy (North Campus)	516/64.7%	A
Dade	Pinecrest Cove Academy	938/55.2%	A
Dade	Pinecrest Glades Academy	586/51.9%	A

Dade	Pinecrest Glades Preparatory Academy Middle High School	319/49.3%	A
Dade	Somerset Academy (Miami-Dade)	659/62.7%	A
Dade	Somerset Academy Middle School (Miami-Dade)	241/48.4%	A
Dade	Somerset Academy (Silver Palms)	797/76.3%	A
Dade	Somerset Academy High School (Miami-Dade)	407/76.4%	A
Dade	Somerset Academy High School (South Campus)	28/42.9%	A
Dade	Somerset Preparatory Academy at Silver Palms	759/73.4%	A
Dade	Somerset City Arts Academy	407/67.3%	B
Dade	Somerset Oaks Academy	581/84.3%	C
Dade	Somerset Academy Elementary School (South Miami Campus)	407/16.5%	A
Dade	Somerset Academy Middle School (South Miami)	218/14.7%	A
Dade	Somerset Academy Charter Elementary School (South Homestead)	531/7.2%	A
Dade	Somerset Academy Charter Middle School (South Homestead)	510/79.0%	A
Dade	Somerset Academy Charter High School (South Homestead)	339/77.6%	B
Dade	Somerset Gables Academy	478/16.5%	A
Dade	Somerset Academy Bay	275/15.4%	A
Dade	Somerset Academy Bay Middle School	71/38.9%	A

Dade	Somerset Preparatory Academy Sunset	297/11.8%	A
Dade	Somerset Academy Virtual Middle High School	NA	NA
Broward	Somerset Academy	941/34.9%	A
Broward	Somerset Academy Middle School	748/38.8%	A
Broward	Somerset Academy High School	885/37.2%	A
Broward	Somerset Arts Conservatory	129/24.0%	A
Broward	Somerset Academy (Miramar Campus)	548/63.0%	A
Broward	Somerset Academy Middle School (Miramar Campus)	430/57.0%	A
Broward	Somerset Academy Miramar South	182/44.5%	A
Broward	Somerset Academy (Davie)	153/62.1%	A
Broward	Somerset Academy East Preparatory	225/75.6%	B
Broward	Somerset Academy Riverside	24/83.3%	NA
Broward	Somerset Academy Riverside Middle School	19/73.7%	B
Broward	Somerset Village Academy	261/95.0%	C
Broward	Somerset Academy Village Charter Middle School	140/92.1%	B
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	786/92.0%	C
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	249/97.2%	C
Broward	Somerset Academy Neighborhood School	540/2.0%	A
Broward	Somerset Preparatory Academy Charter Middle School	333/75.7%	B
Broward	Somerset Academy Charter High School (Miramar Campus)	286/67.5%	B

Broward	Somerset Pines Academy	353/71.5%	D
Broward	Somerset Academy Pompano	159/17.6%	C
Broward	Somerset Academy Key Middle School	376/74.5%	D
Broward	Somerset Academy Key Charter High School	176/60.2%	D
Broward	Ben Gamla Charter School	539/50.9%	A
Broward	Ben Gamla Charter School (North Campus)	114/37.7%	A
Broward	Ben Gamla South Broward	365/78.4%	B
Broward	Ben Gamla Preparatory School	220/47.3%	A
Broward	Ben Gamla Preparatory Charter High School	260/55.0%	B
Orange	Cornerstone Charter Academy	979/22.1%	A
Orange	Cornerstone Charter High School	453/26.0%	A
Orange	Pinecrest Preparatory Charter School (Orlando Campus)	254/89.3%	A
Orange	Pinecrest Creek Academy	110/93.0%	C
Duval	Somerset Academy (Eagle Campus)	99/84.8%	B
Duval	Somerset Academy Charter Middle School (Eagle Campus)	146/91.1%	C
Duval	Somerset Preparatory Academy	265/85.7%	F
Palm Beach	Ben Gamla Charter School Palm Beach	255/28.6%	A
Palm Beach	Somerset Academy Boca	352/28.4%	A
Palm Beach	Somerset Academy Boca Middle	63/42.9%	A
Palm Beach	Somerset Academy Canyons Middle School	875/36.1%	A

Palm Beach	Somerset Academy Canyons High School	736/10.1%	C
Palm Beach	Somerset Academy Lakes Charter School	178.87.1%	D
Palm Beach	Somerset Academy JFK Charter School	520/14.8%	B
Palm Beach	SLAM Palm Beach Charter Middle School	17/86.1%	C
Palm Beach	Bright Futures Academy	271/72.3%	D
Palm Beach	University Preparatory Academy Palm Beach	257/91.1%	C
St. Lucie	Somerset College Preparatory Academy	685/47.5%	A
St. Lucie	Somerset Academy St. Lucie	354/63.6%	C
Monroe	Key West Collegiate School	71/40.8%	C
Osceola	Mater Brighton Lakes	1039/63.8%	C
Osceola	Mater Palms Academy	251/67.7%	C
Lake	Pinecrest Lakes Academy	419/22.7%	A
Hillsborough	Sports Leadership and Management Academy Tampa	371/69%	C
Jefferson	Jefferson County Elementary A Somerset School	368/89.5%	C
Jefferson	Jefferson County Middle A Somerset School	166/82.5%	C
Jefferson	Jefferson County High A Somerset School	187/79.1%	B

c) Provide a clear description of the services be provided by the ESP consistent with the service agreement

The following are specific roles/responsibilities of the ESP:

*General*

- Preserve the mission and vision of Governing Boards in all endeavors related to school operations.
- Assist the board in preparing petitions for board approval.
- Provide leadership and report to Governing Board especially on matters related to the following categories: Budget and Finance; Facilities/Management, Human Resource

Management, Risk Management; Quality Assurance; Legal and Statutory Compliance; and Communications.

*Budget/Finance*

- Assist with bookkeeping, budgeting, financial reporting and financial forecasting, for board oversight and approval.
- Compile data for Governing Board, including but not limited to: financial performance, including variance to budget; staff turnover data; academic performance, including enrollment; and facilities costs and needs, enabling the Governing Board to conduct periodic and annual evaluations of the performance of the School.
- Deliver General accounting services including bookkeeping, purchasing support, payables, asset management, budget preparation, cash flow analysis, and preparation of interim financial statements and assistance with the work of the School's independent certified auditor.
- Assist schools with financial accountability.

*Communications*

- Represent Board as requested for public presentations.
- Maintain sponsor relations and reporting- serve as liaison between sponsor and governing board.
- Provide program marketing, enrollment strategic planning and assistance with community, public and media relations.
- Seek grant opportunities and work with schools to develop grant proposals for Board approval.
- Conduct market studies at the request of the board.
- Prepare petitions for board approval.
- Assist with Community and Public Relations.

*Risk Management/Technology*

- Assist with Food service and transportation coordination, as applicable, and program
- Coordinate Insurance and Legal Compliance for board approval.
- Assist schools to develop technology plans, assess and determine technology needs, and coordinate technology services.
- Handle Claims and Risk Management and Compliance.
- Procurement of insurance policies for board and individual school.

*Education Projects and Quality Assurance*

- Assist schools with federal, state and applicable Sponsor mandates.
- Networking and Professional Development.
- Assist with curriculum development, research and updating, as requested by Board and/or Lead Principal and Principal's Coalition.
- Assist schools with grant budgeting and evaluation procedures, as well as grant implementation, if necessary.
- Assist with process of Quality Assurance and provide assistance to Principals Coalition as directed by Governing Board.
- Coordinate Professional Development Activities as requested by Board.

- Participate as a Member (and Academica Representative) of entity Principal's Coalition.

*Facilities/Maintenance*

- Coordinate facilities management program for schools.
- Prepare plans, timelines and budgets to address facilities needs of the schools.
- Assist with facility needs and maintenance of schools.
- Provide for facilities management and report facilities related issues, concerns, and progress to Board.
- Assist with Site selection, facilities design, and respective financing for governing board approval.
- Assist with site acquisition and development.
- Assist with facility needs and maintenance of schools.
- Coordinate land use approvals.

*Legal and Statutory Compliance*

- Assist with legal document drafting and review.
- Provide school litigation oversight and assist governing board counsel with legal concerns/matter.
- Handle Risk Management Claims.
- Assist with Sponsor Compliance and Reporting.
- Contract Renewals.
- Contract Amendments.
- Work with hired legal counsel for entity.

*Human Resource/Management*

- Coordinate Payroll Services.
- Assist with staffing recommendations.
- Coordinate human resources and assist with recruitment, credential verification and hiring procedures.

e) (CMOs Only) Ensure that the relationship between the ESP ad Applicant entity described in the narrative is clearly consistent with the articles of incorporation and Bylaws

N/A

e) (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 vision

Somerset Academy schools have a longstanding relationship with the ESP. Academica is hired by the Board to provide certain services, which support the operations of the school. Academica reports to the Governing Board, which has the ultimate authority to hire and fire them. Academica charges a flat annual fee per student enrolled at the school, and does not charge a percentage of revenue or income received by the charter school. Academica functions solely as a service provider, similar to any vendor the school hires to provide a service. In analyzing data regarding several ESP's currently working with charter schools (Charter Schools USA, Imagine Schools, etc.), the Board concluded that Academica offers the most competitive price and had a proven track record of success while still allowing for the Board to maintain full control over the operations of the school.

By forming community partnerships, Academica is able to assist the schools in giving students a rich learning environment. Local governments and municipalities, museums, consulates and foreign governments all work seamlessly with client schools to develop these institutions. By doing so, these partnerships identify high quality staff, create unique educational environments, develop successful academic programs, and graduate well-rounded students. By including new client schools in an existing network of over 100 schools and over 50,000 students throughout the country, Academica is able to assist school boards in the implementation of successful charter school practices indicative of success with predominantly minority student populations. These strategies and practices provide new schools with a support network that will afford each the ability to maintain thriving, financially viable, and academically high performing programs. Academica's experienced team of professionals provides services and solutions for every aspect of charter school establishment and operation. This team's experience coupled with the success of the school's in the network, proves Academica's organizational capacity to support the proposed school as well as the entire Somerset network.

This unique relationship was highlighted in the 2017 Charter Management Organizations report released by CREDO.<sup>2</sup> The report looked at the management arrangement of charter school networks and its effect on student success. They looked at Charter Management Organizations (CMO), in which the charter is held by the CMO, and Vendor Operated Schools (VOS), in which the charters have been granted to a third party who then hires a VOS to provide specified services to the school. They also looked at CMOs that hire a VOS, calling it a Hybrid, and identified Academica managed schools as fitting this model. The study found that students attending a school with a Hybrid management model had an equivalent of 51 additional days in math and an additional 46 days in reading. 78% of the Hybrid students in the study were served by an Academica managed school.

*f) Describe the Applicant's performance expectations for the ESP consistent with the service agreement, and a viable adequate plan for how the Applicant will evaluate that performance*

The ESP is hired by the Board to provide certain services, which support the operations of the school. The Boards annually evaluates the ESP and determines continuation and renewal of services based on the ESP's performance on the services and support it provides to the school. Both the ESP and the principal report to the Governing Board, which evaluates them. The Governing Board has the ultimate authority to hire and fire the ESP. Somerset Academy has hired Academica to provide services and support to its schools since their inception. The relationship with the ESP allows Somerset Academy Arizona, Inc. schools to focus on providing the highest quality educational program at the school site while allowing the ESP to focus on the business and academic support services the school needs to succeed.

ESP Evaluations: The governing body will formally evaluate the ESP annually using a board-approved ESP evaluation matrix.

The matrix will rate:

- 1) Contract compliance with the specific requirements identified in the agreement between the ESP and the charter school
- 2) Assess the quality of service provided in each functional area; and
- 3) Provide feedback on the performance of individuals who may provide services to the school.

The evaluation tool will identify strengths and weaknesses of the provider relative to the scope of work, the quality of their service in specific areas, and the individual performance of Service Provider staff. It will be used to monitor the Service Provider's performance over the term of their contract or to inform decisions about

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<sup>2</sup> Center for Research on Education Outcomes, Stanford University. (2017) *Charter Management Organizations*. Stanford, CA: Woodworth, J., Raymond, M., Han, C., Negassi, Y., Richardson, W., Snow, W.

contract renewal, changing Service Providers or self-performing their activities.

The board will designate an evaluation committee or individual (e.g., Executive Director, Board Member or consultant) to coordinate the process. The committee or designate will have the Matrix completed by appropriate members of the school and board members as applicable. The committee will report to the board, who will conduct a meeting with the Service Provider to review and discuss the evaluation.

*g) Describe the ESP's roles and responsibilities in relation to the Applicant consistent with the service agreement*

As stated in question B.3.1.c Academica's roles and responsibilities include but are not limited to:

*General*

- Preserve the mission and vision of Governing Boards in all endeavors related to school operations.
- Assist the board in preparing petitions for board approval.
- Provide leadership and report to Governing Board especially on matters related to the following categories: Budget and Finance; Facilities/Management, Human Resource Management, Risk Management; Quality Assurance; Legal and Statutory Compliance; and Communications.

*Budget/Finance*

- Assist with bookkeeping, budgeting, financial reporting and financial forecasting, for board oversight and approval.
- Compile data for Governing Board, including but not limited to: financial performance, including variance to budget; staff turnover data; academic performance, including enrollment; and facilities costs and needs, enabling the Governing Board to conduct periodic and annual evaluations of the performance of the School.
- Deliver General accounting services including bookkeeping, purchasing support, payables, asset management, budget preparation, cash flow analysis, and preparation of interim financial statements and assistance with the work of the School's independent certified auditor.
- Assist schools with financial accountability.

*Communications*

- Represent Board as requested for public presentations.
- Maintain sponsor relations and reporting- serve as liaison between sponsor and governing board.
- Provide program marketing, enrollment strategic planning and assistance with community, public and media relations.
- Seek grant opportunities and work with schools to develop grant proposals for Board approval.
- Conduct market studies at the request of the board.
- Prepare petitions for board approval.
- Assist with Community and Public Relations.

*Risk Management/Technology*

- Assist with Food service and transportation coordination, as applicable, and program
- Coordinate Insurance and Legal Compliance for board approval.
- Assist schools to develop technology plans, assess and determine technology needs, and coordinate technology services.
- Handle Claims and Risk Management and Compliance.
- Procurement of insurance policies for board and individual school.

*Education Projects and Quality Assurance*

- Assist schools with federal, state and applicable Sponsor mandates.
- Networking and Professional Development.
- Assist with curriculum development, research and updating, as requested by Board and/or Lead Principal and Principal's Coalition.
- Assist schools with grant budgeting and evaluation procedures, as well as grant implementation, if necessary.
- Assist with process of Quality Assurance and provide assistance to Principals Coalition as directed by Governing Board.
- Coordinate Professional Development Activities as requested by Board.
- Participate as a Member (and Academica Representative) of entity Principal's Coalition.

*Facilities/Maintenance*

- Coordinate facilities management program for schools.
- Prepare plans, timelines and budgets to address facilities needs of the schools.
- Assist with facility needs and maintenance of schools.
- Provide for facilities management and report facilities related issues, concerns, and progress to Board.
- Assist with Site selection, facilities design, and respective financing for governing board approval.
- Assist with site acquisition and development.
- Assist with facility needs and maintenance of schools.
- Coordinate land use approvals.

*Legal and Statutory Compliance*

- Assist with legal document drafting and review.
- Provide school litigation oversight and assist governing board counsel with legal concerns/matter.
- Handle Risk Management Claims.
- Assist with Sponsor Compliance and Reporting.
- Contract Renewals.
- Contract Amendments.
- Work with hired legal counsel for entity.

*Human Resource/Management*

- Coordinate Payroll Services.
- Assist with staffing recommendations.
- Coordinate human resources and assist with recruitment, credential verification and hiring

procedures

*b) Ensure ESP-related costs are described in the Budget Assumptions and included in the Start-Up and Three-Year Operational Budget as appropriate*

Academica charges a flat fee of \$450 per student FTE, per year during the term of the agreement. The service fee may be payable in equal monthly installments. The ESP does not charge a percentage of revenue or income received by the charter school and does not receive any other compensation from the school. This is consistent with what is described in the Start-Up and Three-Year Operational Budget.

### B.3.1 Exhibit Performance Data Academica

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2017-18 School Year Accountability			
District	School Name	Enrollment /FRL%	School Grade/School Improvement Rating
Dade	Mater Academy	1122/89.2%	A
Dade	Mater Academy East Charter School	502/87.6%	A
Dade	Mater Academy East Charter Middle School	167/90.4%	B
Dade	Mater Academy East Charter High School	247/76.3%	B
Dade	Mater Academy of International Studies	536/95.1%	C
Dade	Mater Academy Middle School of International Studies	169/94.1%	A
Dade	Mater Academy High School of International Studies	25/88%	A
Dade	Mater International Academy	165/96.4%	A
Dade	Mater Academy Middle School	1282/84.1%	A
Dade	Mater Academy High School	1742/79.9%	A
Dade	Mater Performing Arts & Entertainment Academy	342/78.9%	A
Dade	Mater Gardens Academy Elementary School	596/50.8%	A
Dade	Mater Gardens Academy Middle School	203/50.2%	A
Dade	Mater Lakes Academy Middle School	848/75.9%	A
Dade	Mater Lakes Academy High School	1281/74.9%	B
Dade	Mater Academy (Miami Beach)	547/67.3%	A
Dade	Mater Grove Academy	707/60.7%	A
Dade	Mater Brickell Preparatory School	170/53.5%	A

Dade	Mater Academy at Mt. Sinai	167/65.3%	A
Dade	iMater Academy	662/88.7%	C
Dade	iMater Academy Middle School	804/88.9%	B
Dade	iMater Preparatory Academy High School	799/87.5%	A
Dade	Mater Academy Bay	480/55.4%	A
Dade	Mater Academy Bay Middle	93/34.4%	A
Dade	Mater Academy Virtual Middle School	NA/26.8%	A
Dade	Sports Leadership and Management Charter Middle School	606/92.6%	D
Dade	Sports Leadership and Management Charter High School	605/87.8%	B
Dade	Sports Leadership and Management (SLAM) Charter Middle School-North Campus	148/95.9%	C
Dade	Ben Gamla Charter School	248/46.8%	A
Dade	City of Hialeah Educational Academy	824/86.4%	A
Dade	Doral Academy	1076/41%	A
Dade	Just Arts and Management Middle School	176/40.9%	A
Dade	Doral Academy of Technology	216/36.6%	A
Dade	Doral Academy Charter Middle School	1189/47.5%	A
Dade	Doral Academy Charter High School	1673/49.9%	A
Dade	Doral Performing Arts and Entertainment Academy	395/44.1%	A
Dade	Theodore R. and Thelma A. Gibson Charter School	153/94.1%	B
Dade	Integrated Science and Asian Culture Academy	183/54.1%	A

### B.3.1 Exhibit Educational Service Providers

Dade	International Studies Charter Middle School	312/76.0%	A
Dade	International Studies Charter High School	404/74.8%	A
Dade	International Studies Virtual Academy	NA	NA
Dade	Miami Children's Museum Charter School	294/34.4%	C
Dade	Pinecrest Preparatory Academy Charter School	604/63.1%	A
Dade	Pinecrest Preparatory Academy Charter Middle School	527/64.1%	A
Dade	Pinecrest Preparatory Academy High School	497/56.1%	A
Dade	Pinecrest Academy South Campus	750/3.1%	A
Dade	Pinecrest Academy (North Campus)	516/64.7%	A
Dade	Pinecrest Cove Academy	938/55.2%	A
Dade	Pinecrest Glades Academy	586/51.9%	A
Dade	Pinecrest Glades Preparatory Academy Middle High School	319/49.3%	A
Dade	Somerset Academy (Miami-Dade)	659/62.7%	A
Dade	Somerset Academy Middle School (Miami-Dade)	241/48.4%	A
Dade	Somerset Academy (Silver Palms)	797/76.3%	A
Dade	Somerset Academy High School (Miami-Dade)	407/76.4%	A
Dade	Somerset Academy High School (South Campus)	28/42.9%	A
Dade	Somerset Preparatory Academy at Silver Palms	759/73.4%	A
Dade	Somerset City Arts Academy	407/67.3%	B
Dade	Somerset Oaks Academy	581/84.3%	C

### B.3.1 Exhibit Educational Service Providers

Dade	Somerset Academy Elementary School (South Miami Campus)	407/16.5%	A
Dade	Somerset Academy Middle School (South Miami)	218/14.7%	A
Dade	Somerset Academy Charter Elementary School (South Homestead)	531/7.2%	A
Dade	Somerset Academy Charter Middle School (South Homestead)	510/79.0%	A
Dade	Somerset Academy Charter High School (South Homestead)	339/77.6%	B
Dade	Somerset Gables Academy	478/16.5%	A
Dade	Somerset Academy Bay	275/15.4%	A
Dade	Somerset Academy Bay Middle School	71/38.9%	A
Dade	Somerset Preparatory Academy Sunset	297/11.8%	A
Dade	Somerset Academy Virtual Middle High School	NA	NA
Broward	Somerset Academy	941/34.9%	A
Broward	Somerset Academy Middle School	748/38.8%	A
Broward	Somerset Academy High School	885/37.2%	A
Broward	Somerset Arts Conservatory	129/24.0%	A
Broward	Somerset Academy (Miramar Campus)	548/63.0%	A
Broward	Somerset Academy Middle School (Miramar Campus)	430/57.0%	A
Broward	Somerset Academy Miramar South	182/44.5%	A
Broward	Somerset Academy (Davie)	153/62.1%	A
Broward	Somerset Academy East Preparatory	225/75.6%	B

### B.3.1 Exhibit Educational Service Providers

Broward	Somerset Academy Riverside	24/83.3%	NA
Broward	Somerset Academy Riverside Middle School	19/73.7%	B
Broward	Somerset Village Academy	261/95.0%	C
Broward	Somerset Academy Village Charter Middle School	140/92.1%	B
Broward	Somerset Preparatory Academy Charter School at North Lauderdale	786/92.0%	C
Broward	Somerset Preparatory Academy Charter High School at North Lauderdale	249/97.2%	C
Broward	Somerset Academy Neighborhood School	540/2.0%	A
Broward	Somerset Preparatory Academy Charter Middle School	333/75.7%	B
Broward	Somerset Academy Charter High School (Miramar Campus)	286/67.5%	B
Broward	Somerset Pines Academy	353/71.5%	D
Broward	Somerset Academy Pompano	159/17.6%	C
Broward	Somerset Academy Key Middle School	376/74.5%	D
Broward	Somerset Academy Key Charter High School	176/60.2%	D
Broward	Ben Gamla Charter School	539/50.9%	A
Broward	Ben Gamla Charter School (North Campus)	114/37.7%	A
Broward	Ben Gamla South Broward	365/78.4%	B
Broward	Ben Gamla Preparatory School	220/47.3%	A
Broward	Ben Gamla Preparatory Charter High School	260/55.0%	B
Orange	Cornerstone Charter Academy	979/22.1%	A
Orange	Cornerstone Charter High School	453/26.0%	A

### B.3.1 Exhibit Educational Service Providers

Orange	Pinecrest Preparatory Charter School (Orlando Campus)	254/89.3%	A
Orange	Pinecrest Creek Academy	110/93.0%	C
Duval	Somerset Academy (Eagle Campus)	99/84.8%	B
Duval	Somerset Academy Charter Middle School (Eagle Campus)	146/91.1%	C
Duval	Somerset Preparatory Academy	265/85.7%	F
Palm Beach	Ben Gamla Charter School Palm Beach	255/28.6%	A
Palm Beach	Somerset Academy Boca	352/28.4%	A
Palm Beach	Somerset Academy Boca Middle	63/42.9%	A
Palm Beach	Somerset Academy Canyons Middle School	875/36.1%	A
Palm Beach	Somerset Academy Canyons High School	736/10.1%	C
Palm Beach	Somerset Academy Lakes Charter School	178.87.1%	D
Palm Beach	Somerset Academy JFK Charter School	520/14.8%	B
Palm Beach	SLAM Palm Beach Charter Middle School	17/86.1%	C
Palm Beach	Bright Futures Academy	271/72.3%	D
Palm Beach	University Preparatory Academy Palm Beach	257/91.1%	C
St. Lucie	Somerset College Preparatory Academy	685/47.5%	A
St. Lucie	Somerset Academy St. Lucie	354/63.6%	C
Monroe	Key West Collegiate School	71/40.8%	C
Osceola	Mater Brighton Lakes	1039/63.8%	C
Osceola	Mater Palms Academy	251/67.7%	C
Lake	Pinecrest Lakes Academy	419/22.7%	A
Hillsborough	Sports Leadership and Management Academy Tampa	371/69%	C

### B.3.1 Exhibit Educational Service Providers

Jefferson	Jefferson County Elementary A Somerset School	368/89.5%	C
Jefferson	Jefferson County Middle A Somerset School	166/82.5%	C
Jefferson	Jefferson County High A Somerset School	187/79.1%	B

School Name	Grades Offered	Address	Phone
<b>Miami-Dade County</b>			
Ben Gamla Charter School	K-8	11155 SW 112th Avenue Miami, 33176	(305) 596-6266
City of Hialeah Educational Academy	6-12	2590 W. 76th street, Hialeah, 33016	(305) 362-4006
Doral Academy	K-5	2450 NW 97th Avenue, Miami, 33172	(305) 597-9999
Just Arts and Management Middle School (JAM)	6	2601 NW 112th Avenue, Miami, 33172 & 11100 NW 27th Street, Miami, 33172	(305) 597-9950
Doral Academy of Technology	6-8		
Doral Academy Charter Middle School	6-8		
Doral Academy Charter High School	9-12		
Doral Performing Arts & Entertainment Academy	9-12		
Theodore R. and Thelma A. Gibson Charter School	K-5	1698 NW 4th Avenue, Miami, 33136	(305) 438-0895
Integrated Science And Asian Culture Academy (ISAAC)	K-3	301 Westward Drive, Miami Springs, 33166	(305) 863-8030
International Studies Charter Middle School	6-8	2480 SW 8th Street, Miami, 33135	(305) 643-2955
International Studies Charter High School	9-12		
International Studies Virtual Academy	7-9		
Mater Academy	K-2	7700 NW 98th Street, Hialeah Gardens, 33016	(305) 698-9900
	3-5	8003 NW 103 Street, Hialeah Gardens, 33016	
Mater Academy East Charter School	K-5	450 SW 4th Street, Miami, 33130	(305) 324-4667
Mater Academy East Charter Middle School	6-8	998 SW 1st Street, Miami, 33130	(305) 324-6963
Mater Academy East Charter High School	9-12		
Mater Academy of International Studies	K-3	795 NW 32nd Street, Miami, 33127	(305) 634-0445
Mater International Preparatory	5-9		
Mater International Academy	K-2	3405 NW 27th Avenue, Miami, 33142	(305) 638-8016
Mater Academy Middle School	6-8	7901 NW 103rd Street, Hialeah Gardens, 33016	(305) 828-1886
Mater Academy High School	9-12	& 8003 NW 103 Street,	
Mater Performing Arts & Entertainment Academy	9-12		
Mater Gardens Academy	K-5	9010 NW 178th Lane, Miami, 33018	(305) 512-9775
Mater Gardens Academy Middle School	6-8		
Mater Lakes Academy Middle School	6-8	17300 NW 87th Ave, Miami, 33015	(305) 512-3917
Mater Lakes Academy High School	9-12		
Mater Academy (Miami Beach)	K-9	8625 Byron Avenue, Miami Beach, 33141	(305) 864-2889
Mater Grove Academy	K-8	2805 SW 32nd Avenue, Miami, 33133	(305) 442-4992
Mater Brickell Preparatory Academy	K-8		
Mater Academy at Mt. Sinai	K-5	4300 Alton Road, Miami Beach, 33140	(305) 604-1453
iMater Academy	K-5	600 West 20th Street, Hialeah, 33010	(305) 884-6320
iMater Academy Middle School	6-8	651 West 20th Street, Hialeah, 33010	(305) 805-5722
iMater Preparatory Academy High School	9-12		
Mater Academy Bay	K-5	22025 SW 87TH Avenue, Cutler Bay, FL 33190	(305) 969-5989
Mater Academy Bay Middle School	6-7		
Mater Academy Virtual Middle High	7-12	17300 NW 87th Ave, Miami, 33015	(786) 457-2726

Miami Children's Museum Charter School	K-5	980 McArthur Causeway, Miami, 33132	(305) 329-3758
Pinecrest Preparatory Academy Charter School	K-5	14301 SW 42nd Street, Miami, 33175	(305) 207-1027
Pinecrest Preparatory Academy Charter Middle School	6-8	14901 SW 42nd Street, Miami, 33185	(305) 559-8583
Pinecrest Preparatory Academy High School	9-12		
Pinecrest Academy South Campus	K-5	15130 SW 80th Street, Miami, 33193	(305) 386-0800
Pinecrest Academy (North Campus)	K-8	10207 West Flagler Street, Miami, 33174	
Pinecrest Academy North Preparatory	K-8	8925 Fontainebleau Blvd., Miami, 33172	(305) 553-9762
Pinecrest Cove Academy	K-8	Site 1: 4101 SW 107th Ave, Miami, 33165 Site 2: 4301 SW 107th Ave, Miami, FL 33165	(305) 480-2097
Pinecrest Glades Academy	K-5	15250 SW 8th Street, Miami, FL 33194	
Pinecrest Glades Preparatory Academy Middle High School	6-8		(305) 229-6949
Somerset Academy	K-5	Site 1: 18491 SW 134th Avenue, Miami, 33177	
	K	Site 2 ( <i>Kinder Only</i> ): 19701 S.W. 127 Avenue	(305) 969-6074
Somerset Academy Charter Middle School	6-8	18491 SW 134th Avenue, Miami, 33177	(305) 969-6074
Somerset Academy (Silver Palms)	K-8	23255 SW 115th Avenue, Miami, 33032	
Somerset Academy Charter High School	9-12		(305) 257-3737
Somerset Academy Silver Palms at Princeton	K-8	13390 SW 248th St, Miami 33032	
Somerset Arts Academy	K-6	47 NW 16th Street, Homestead, 33030	(305) 246-4949
Somerset Oaks Academy	K-8	1000 Old Dixie Highway, Homestead, 33030	(305) 247-3993
Somerset Academy Elementary School (South Miami Campus)	K-5	5876 SW 68th Street, Miami, 33143	
Somerset Academy Middle School (South Miami Campus)	6-8		(305) 740-0509
Somerset Academy Charter Elementary School (South Homestead)	K-5	300 SE 1st Avenue, Homestead, 33030	(305) 248-8684
Somerset Academy Charter Middle School (South Homestead)	6-8	305 NE 2nd Road, Homestead, 33030	
Somerset Academy Charter High School (South Homestead)	9-12		(305) 258-7497
Somerset Gables Academy	K-5	624 Anastasia Avenue, Coral Gables, 33134 5859 SW 16th Street, West Miami, 33155	(305) 442-8626
Somerset Academy Bay	K-5	9500 SW 97th Avenue, Miami, 33176	
Somerset Academy Bay Middle School	6-8		(305) 274-0682
Somerset Preparatory Academy Sunset	K-5	11155 SW 112th Avenue Miami, 33176	(305) 274-5696
Somerset Palms Academy	K-5	12001 SW 72nd St, Miami 33183	(786) 574-5287
Somerset Academy Kendall	K-5	9790 SW 107 Court Miami 33176	(786) 860-5975
Somerset Academy Virtual Middle High School	7-12	305 NE 2nd Road, Homestead, 33030	(305) 258-7497
Sports Leadership and Management (SLAM) Charter Middle School	6-8	604 NW 12 <sup>th</sup> Avenue, Miami, 33135	
Sports Leadership and Management Academy (SLAM)	9-12		(305) 326-0003

Sports Leadership and Management (SLAM) Middle School - North Campus	6-7	* Temp. Facility for 1 year – 1770 NE 162 Street, North Miami Beach, 33162 * Perm. Facility (new construction) – 16551 NE 16th Avenue, North Miami Beach, 33162	(305) 333-5702
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<b>Broward County</b>			
Somerset Academy	K-5	20801 Johnson Street, Pembroke Pines, 33029	
Somerset Academy Middle School	6-8	20803 Johnson Street, Pembroke Pines, 33029	
Somerset Academy High School	9-12	20805 Johnson Street, Pembroke Pines, 33029	(954) 442-0233
Somerset Arts Conservatory	9-12	20805 Johnson Street, Pembroke Pines, 33029	
Somerset Academy South	K-5	19620 Pines Blvd, Pembroke Pines, 33029	
Somerset Academy (Miramar Campus)	K-5	12601 Somerset Boulevard, Miramar,	
Somerset Academy Middle School (Miramar Campus)	6-8	12425 SW 53rd Street, Miramar, 33027	(305) 829-2406
Somerset Academy Miramar South	K-3		
Somerset Academy (Davie)	K-5	3788 Davie Road, Davie, 33314	(954) 584-5528
Somerset Academy East Preparatory	K-5	2000 South State Road 7,	(954) 987-7890
Somerset Academy Village	K-5	225 NW 29th Street, Wilton Manors, 33311	(954) 390-0971
Somerset Academy Village Charter Middle School	6-8		
Somerset Preparatory Academy Charter School at North Lauderdale	K-8	7101 Kimberly Boulevard, North	(954) 718-5065
Somerset Preparatory Academy Charter High School at North Lauderdale	9-12		
Somerset Academy Neighborhood School	K-5		
Somerset Preparatory Academy Charter Middle School	6-8	9300 Pembroke Road, Miramar, 33025	(954) 435-1570
Somerset Academy Charter High School (Miramar Campus)	9-12		
Somerset Pines Academy	K-5	901 NE 33rd Street, Pompano Beach, 33064	(954) 786-5980
Somerset Academy Pompano	K-5	3311 NW 9th Avenue, Pompano Beach, 33064	(954) 946 4144
Somerest Academy Key Charter Middle School (f.k.a. Somerset Academy Pompano Middle School)	6-8	959 SE 6th Ave., Deerfield Beach, FL 33441	(954) 481-0602
Somerset Academy Key Charter High School	9-12		
Somerset Academy Riverside Charter School	K-5	2251 Riverside Dr. Coral Springs, FL 33065	954-255-9740
Somerset Academy Riverside Charter Middle School	6-8		
Ben Gamla Charter School	K-6	2620 Hollywood Boulevard, Hollywood,	(954) 342-4064
Ben Gamla Charter School (North Campus)	K-6		
Ben Gamla South Broward	K-8	6501 West Sunrise Boulevard, Plantation, 33313	(954) 587-8348
Ben Gamla Preparatory Academy	6-12	2650 Van Buren Street	(954) 924-6495
<b>Palm Beach County</b>			
Ben Gamla Charter School Palm Beach	K-5	8600 Jog Road, Boynton Beach	(561) 742-8017
Somerset Academy Boca	K-5	333 SW 4th Avenue, Boca Raton, 33432	(561) 393-1091
Somerset Academy Boca Middle	6-8		
Somerset Academy Canyons Middle School	6-8	9385 Boynton Beach	(561) 732-8250

Somerset Academy Canyons High School	9-12	Boulevard, Boynton	(501) 734-0234
Somerset Academy Lakes Charter School	K-5	2845 Summit Blvd., West	(561) 641-4449
SLAM Palm Beach Charter School	6-7	Palm Beach, FL 33406	(561) 434-2162
Bright Futures Academy	K-8	Riverside Campus: 10350 Riverside Drive Palm Beach Gardens, FL 33410	(561) 253-7504
JFK Medical Center Charter School		4696 Davis Rd, Lake Worth, FL 33461	(561) 868-6100
University Preparatory Academy		2101 N Australian Ave., West Palm Beach, Florida 33407	(561) 670-1138
<b>St. Lucie County</b>			
Somerset College Preparatory Academy	6-12	725 NW California Blvd, Port St. Lucie, FL 34986	(772) 343-7028
Somerset Academy St. Lucie	K-5	4402 SW Yamada Drive, Port St. Lucie, FL 34953	(772) 281-2300
<b>Orange County</b>			
Cornerstone Charter Academy	K-8	5903 Randolph Avenue, Orlando, 32809	(407) 608-7171
Cornerstone Charter High School	9-12		
Pinecrest Preparatory Charter School (Orlando Campus)	K-8	8503 Daetwyler Drive Orlando, 32827	(407) 856-8359
Pinecrest Collegiate Academy	K-5	13993 Mailer Blvd, Orlando 32828	(407) 432-5441
Pinecrest Creek Academy	K-5	1100 Lee Road, Orlando, 32810	(407) 757-2706
<b>Osceola County</b>			
Mater Brighton Lakes Academy	K-8	3200 Pleasant Hill Road, Kissimmee, 34746	(407) 931-0325
Mater Palms Academy	K-8	401 S. Poinciana Boulevard, Kissimmee, Florida 34746	(407) 288-7998
Mater Academy St. Cloud	K-8	1925 Nora Tyson Rd, St. Cloud 34771	(407) 325-0762
<b>Lake County</b>			
Pinecrest Lakes Academy		14012 Old Highway 50, Minneola, FL 34711	(352) 223-4482
<b>Hillsborough County</b>			
Sports Leadership and Management Academy (Tampa)	6-10	7116 Gunn Highway, Tampa, FL 33625	(813) 334-7050
<b>Duval County</b>			
Somerset Academy (Eagle Campus)	K-5	8711 Lone Star Road, Jacksonville, 32211	(904) 551-3292
Somerset Preparatory Academy	K-8	1429 Broward Blvd, Jacksonville, 32218	(904) 503-0661
Somerset Academy Charter Middle School (Eagle Campus)	6-8		
<b>Jefferson County</b>			
Jefferson County Elementary A Somerset Charter School	PreK3 - 5	50 David Road, Monticello, FL 32344	(850) 342-0100
Jefferson County Middle A Somerset Academy Charter School	6-8		
Jefferson County High A Somerset Academy Charter School	9-12		
<b>Monroe County</b>			
Key West Collegiate School	9-12	5901 College Road, Key West, 33040	(305) 296-5927

**CHARTER SCHOOL EDUCATIONAL SERVICES AND SUPPORT AGREEMENT**  
**BETWEEN**  
**SOMERSET ACADEMY ARIZONA, INC.**  
**AND**  
**ACADEMICA ARIZONA LLC**

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## **CHARTER SCHOOL EDUCATIONAL SERVICES AND SUPPORT AGREEMENT**

This Agreement to provide Educational Services and Support to Charter Schools is by and between SOMERSET ACADEMY ARIZONA, INC. (“CharterSchoolCorp”) on behalf of the charter schools identified on Exhibit A (“School”) and ACADEMICA ARIZONA, LLC, (“Service Provider”).

**WHEREAS**, CharterSchoolCorp operates a network of public charter schools and has contracts (“Charters”) with Arizona State Board for Charter Schools (“Sponsor”) to operate School, each of which is identified on Exhibit A;

**WHEREAS**, the School is governed by the Board of Directors of CharterSchoolCorp (the “Board”), an independent Board of Volunteers;

**WHEREAS**, the Board has complete control over the School, its academic programs, staffing needs, and curricula;

**WHEREAS**, CharterSchoolCorp desires academic support and related services to ensure that its School is operated in accordance with the requirements of its Charter, all State and Federal laws, as well as all applicable local, municipal and/or county ordinances;

**WHEREAS**, Service Provider is an educational service provider established to provide professional services and related support to public charter schools;

**WHEREAS**, it is Service Provider’s mission to ensure that the vision of the Board is faithfully and effectively implemented and to ensure the autonomy and governing authority of the Board;

**WHEREAS**, the Board is responsible for the management and operation of the School in accordance with the Charter and Arizona law;

**WHEREAS**, Service Provider’s officials are familiar with governmental agencies and requirements needed to establish and operate public charter schools including the Schools, as well as the requirements of the Charter, of all State and Federal authorities, and of the local municipal and/or county government(s) which may be applicable to the operation of the School;

**WHEREAS**, Service Provider’s officials are familiar with the various local, state and/or federal funding sources for charter school programs and have successfully obtained grants and other forms of revenue and financing for various charter school programs;

**WHEREAS**, Service Provider works with networks of charter schools and has found there are benefits to establishing charter school cooperatives and sharing best-practices and resources, including methods of reporting, record-keeping and accountability systems; and

**WHEREAS**, CharterSchoolCorp and Service Provider enter into this Agreement for the purpose of having Service Provider provide the academic support services and related administrative services identified in this Agreement to the School;

**NOW THEREFORE**, the parties to this Agreement agree as follows:

**DUTIES OF SERVICE PROVIDER:**

**1. Recitals:** The foregoing recitals are true, correct and incorporated herein by this reference.

**2. Engagement**

CharterSchoolCorp engages Service Provider to provide the support and administrative service set forth herein to the School. Service Provider accepts such engagement pursuant to the terms of this Agreement. The parties may add or remove schools from the list of schools receiving Service Provider's services by amending Exhibit A in a writing signed by both parties.

**3. Duties**

As authorized by the Board, Service Provider will coordinate the educational and administrative services required to support the School. Service Provider will report to the Board and advise it of the systems established for administrative duties, including those related to initial setup and the ongoing operational budget. Service Provider will comply with all Board and School policies and procedures, the Charter, and with all applicable state and federal rules and regulations. Service Provider's services will include: identification of potential school-sites; assistance with staff recruitment; assistance with human resource coordination; regulatory compliance; legal and corporate upkeep; and assistance with the maintenance of the books and records of the School and CharterSchoolCorp as well as bookkeeping, budgeting and financial forecasting. The Board will review all recommendations made by Service Provider and act upon them in the manner the Board decides.

**4. Board of Directors Meetings**

Service Provider will assist in the coordination of and attend the meetings of the Board. Unless otherwise instructed by the Board, Service Provider shall maintain the minutes and records of those meetings

and ensure that the School complies with the requirements of State law and the Charter regarding such meetings and record keeping.

**5. Record Keeping**

Service Provider will maintain the records of the School at the location designated by the Board, and in compliance with the State and Charter requirements for record keeping. In addition, Service Provider will ensure that designated on-site School staff receive proper training by the Sponsor's appropriate departments for student/school record keeping through its designated Management Information Services (MIS) programs and proper training regarding public records.

**6. Bookkeeping**

The Service Provider will work with and serve as liaison to any accounting firm selected by the Board to ensure the accuracy and timeliness of the financial reporting, record keeping, and audits required by the Charter and State law.

**7. Staff Administration**

CharterSchoolCorp or Board and/or its delegate will make all hiring decisions for the School and CharterSchoolCorp in accordance with law. Service Provider shall not be considered a delegate of CharterSchoolCorp or Board for this purpose. Service Provider will assist the Board in the identification, solicitation, and/or recruitment of qualified principals, teachers, paraprofessionals, administrators and other staff members and education professionals to be employed at or by School. School employees shall not be employees of Service Provider. School employees shall only be removed, dismissed, or transferred with approval of the Board or its delegate. The Board shall decide whether to use a professional employee management company and the method of human resource management, if any.

The teachers employed by the School will be qualified as required by Title 15, Arizona Revised Statutes., as applicable to charter schools. Skilled selected non-certified personnel may also be employed by or at the School as permitted by law. At the request of the Board, Service Provider will, assist in the preparation of employment contracts for review and approval by the Board or its delegate. Upon Board request, Service Provider will propose a professional employer organization to the Board which can perform the human resource outsourcing services for the School. If the Board, in its discretion, approves a professional employer organization and/or human resource outsourcing provider, Service Provider will assist in the coordination of these services. Service Provider will act as the liaison for the School vis-à-vis

the professional employer organization. All School based employees will be employees of CharterSchoolCorp, and shall be assigned to the School, and may only be removed, dismissed, or transferred with approval of CharterSchoolCorp, the Board and/or its delegate.

#### **8. Financial Projections and Financial Statements**

Service Provider will prepare and present to the Board in a timely manner for review and approval annual budgets and financial forecasts for the School. The School will use the standard state codification of accounts for the Financial and Program Cost Accounting and Reporting for charter schools as required by law or shall utilize GAAP Accounting, and/or other applicable guidelines as a means of codifying all transactions pertaining to financial operations as required by law and the Charter. The Board shall annually adopt and maintain an operating budget. The Board, based on recommendations made by a certified public accounting firm, will adopt accounting policies and procedures. Service Provider will timely prepare, for the review and approval of the Board, any required regular unaudited financial statements including a statement of revenues and expenditures and changes in fund balances, in accordance with generally accepted accounting principles to be delivered to the Sponsor. These financial statements will be provided in advance of the deadline for submission of such reports to the Sponsor. CharterSchoolCorp will provide the Sponsor with annual audited financial reports as required by the Charter. These reports will be prepared by a qualified independent, certified public accounting firm. Service Provider will provide the regular unaudited financial statements, books and records to the auditor for review in connection with the preparation of the annual audited financial reports. The reports shall include a complete set of financial statements and notes prepared in accordance with the Charter and generally accepted accounting principles, for inclusion in the School's annual financial statements, and formatted by revenue source and expenditures, and detailed by function and object.

#### **9. Designated Contact Person**

The designated contact person of Service Provider shall be Fernando Zulueta. An alternate contact person shall be Maggie Fresen.

#### **10. Grant Solicitation**

In consultation with the Board, and with Board approval, Service Provider will solicit grants available for the funding of the School from the various government, private and institutional sources

which may be available. Such grants may include, but are not limited to federal grants programs and various continuation grants for charter schools.

### **11. Financing Solicitation and Coordination**

If authorized by the Board, Service Provider will coordinate obtaining financing from private and public sources for loans desired by the Board.

### **12. Other Funding Sources**

If authorized by the Board, Service Provider will coordinate the solicitation of Capital Outlay Funds, if available, from the appropriate state and/or local agencies. Similarly, as authorized by the Board, Service Provider will coordinate the solicitation of other available state, federal, or local government funds earmarked for schools and/or facilities development, improvement, or acquisition, as well as other sources of funding that may become available to charter schools from time to time.

### **13. Annual Reporting**

Service Provider will coordinate the preparation of any Annual Report(s) required by the Charter or by law for the School. The Report will be submitted to the Board for approval, Service Provider will coordinate the delivery and review process established by the Sponsor and Charter School legislation for the Annual Report.

### **14. Student Assessment**

Upon the approval of the Board, Service Provider will coordinate a student assessment methodology, independent from State and/or Sponsor required assessments, and retain on behalf of CharterSchoolCorp professionals to administer and evaluate results. Service Provider will provide the Board with proposals from professionals offering to provide assessment and student evaluation services for Board approval.

### **15. School Board Representation**

Service Provider will serve as a liaison with the Sponsor and its officials on behalf of the School. Service Provider's representatives will attend required meetings and public hearings; will facilitate communications between the School and the Sponsor; and, will present or advocate positions reviewed and approved by the Board.

## **16. Governmental Compliance**

Service Provider will advise CharterSchoolCorp and School regarding compliance with state regulations and reporting requirements of the School. In addition, Service Provider will advise the CharterSchoolCorp and School regarding any compliance requirements of the Sponsor's, including, as applicable: Disclosure, Verification and Affirmation of Fulfillment of Board Requirements. Service Provider will also advise CharterSchoolCorp and School regarding the School's compliance with its Charter, the terms of which are incorporated by reference.

## **17. Charter Renewal Coordination**

Service Provider will advise CharterSchoolCorp regarding the renewal of the Charter, coordinate the renewal with the Sponsor, and assist the Board and School to complete the renewal process on a timely basis. Service Provider will negotiate the terms of the renewal Charter with the Sponsor, inform the Board of the progress of those negotiations, notify the Board of any renewal provisions which modify or alter the terms of the existing Charter, and obtain Board approval of any negotiating strategy and of the terms of the renewal Charter.

## **18. Curriculum Development**

As authorized by the Board, Service Provider shall identify and/or develop curricula in connection with the operations of the School and the vision of the Board in a manner that complies with applicable federal, state and local laws and regulations. All curricula shall be approved by the Board prior to use.

## **19. Pre-School, After-Care, Early Drop-Off**

At the direction of the Board, Service Provider shall identify Pre-School, After-Care, and/or Early Drop-Off programs that may be offered by the School. The School may elect not to offer these programs directly. In furtherance of that, Service Provider will provide recommendations to the Board to retain the necessary operators to provide the underlying services to the parents and students desiring them. Service Provider will coordinate the provision of those services where applicable and establish agreements to reimburse the School for the use of the facilities, utilities, cleaning services and other costs consumed or incurred. The direct primary supplier to the parents and students of those ancillary services will indemnify and hold the School harmless for any liability which may result. All terms and conditions for any program, including financial terms, operating procedures, or ownership, shall be reviewed and approved by the Board.

## **20. School-Site Identification**

Service Provider shall coordinate with the Board for the purpose of identifying CharterSchoolCorp's school-site and facilities needs from year-to-year. Service Provider shall assist the Board in identifying potential new school sites and potential expansion of existing sites and facilities. Service Provider may identify and solicit investors to acquire and/or develop school sites and facilities for lease or use by CharterSchoolCorp. Where such investors are related to Service Provider or its principals, such relationship will be disclosed to the Board. At the Board's request, Service Provider shall recommend qualified professionals, who the Board may retain, in the fields of school design, architecture, and engineering, as well as professionals in the areas of development and construction, for the expansion, design, development, and/or construction of new and/or existing school sites.

## **21. Systems Development**

Service Provider will identify and develop a school information system to be used in connection with the administration and reporting system for the School. This includes, but is not limited to, accounting documentation filing systems, student records systems, computer systems, and telecommunications services. All such systems must be reviewed and approved by the Board.

### **TERM OF AGREEMENT**

## **22. Initial Term**

Unless otherwise terminated as provided in Section 24, the term of this Agreement shall be five (5) years, commencing July 1, 2019 through June 30, 2024 ("Initial Term"), except as otherwise set forth for any specific school on Exhibit A. The Commencement Date shall be deemed to be July 1 of the initial year of the Agreement, although the parties recognize that Service Provider has provided services to the Board in connection with the School and Charter before this date.

At the conclusion of the final term of this Agreement, CharterSchoolCorp shall have the option to renew this contract with Service Provider.

## **23. Renewal**

At the expiration of the Initial Term, or any Renewal Term thereafter, this Agreement shall be renewed for an additional Renewal Term of five (5) years unless terminated by the Board pursuant to Section 24. Service Provider agrees to renew this Agreement at CharterSchoolCorp's option on the then-current terms

and conditions unless there has been an uncured material breach hereunder by CharterSchoolCorp, after 60 days written notice of such breach and demand for cure.

#### **24. Termination**

- A. In the event of a breach of this Agreement by either party, the non-breaching party shall give the other party written notice of such breach and sixty (60) days to cure such breach. "Breach" shall be defined as a material breach of this Agreement by Service Provider or CharterSchoolCorp; the failure of Service Provider to provide educational support and related services sufficient to operate the School in a manner that complies with the standards of the Sponsor; any debarment of or similar action against Service Provider by any governmental entity; or any action or conduct by Service Provider or its principals that may bring disrepute to the School or Board (e.g., any arrest or conviction for a crime of moral turpitude or any felony) or that may endanger or materially lessen the health, safety or welfare of students. If the Sponsor terminates or materially changes the Charter, either CharterSchoolCorp or Service Provider may upon thirty (30) days written notice terminate this Agreement without penalty or liability of any kind to either party. Notwithstanding the aforementioned, during the 1<sup>st</sup> year of this Agreement, Service Provider may immediately terminate this Agreement for any Breach of CharterSchoolCorp by delivering written notice of such termination to CharterSchoolCorp at the address provided herein..
- B. If the Sponsor materially changes a part of the Charter, the CharterSchoolCorp or Service Provider may upon thirty (30) days written notice terminate any corresponding part of this Agreement without penalty or liability of any kind to either party.
- C. Termination rights established in this section 24 shall apply equally to each school listed on Exhibit A. CharterSchoolCorp may terminate this Agreement in its entirety, for any individual school, or for any number of Schools listed on Exhibit A.
- D. Either party may terminate this Agreement, in its entirety or for any individual school or group of schools in Exhibit A, at any time and for any reason, and without cause, upon providing the other party 90 days' written notice of termination. In the event of termination of this Agreement, in whole or in part, for any reason, the compensation to be paid by CharterSchoolCorp to Service Provider under this Agreement shall be pro-rated.

## **COMPENSATION**

### **25. Service Fee**

CharterSchoolCorp shall pay Service Provider a “Service Fee” of four hundred fifty dollars (\$450) per student Full Time Equivalent (FTE) per annum during the term of this Agreement, unless terminated, provided CharterSchoolCorp receives such funds. The Service Fee shall be payable in equal monthly installments, provided that CharterSchoolCorp shall have no obligation to pay such Service Fee before receiving its FTE funding from the Sponsor or the State of Arizona, in which event the monthly installments shall accrue until funding is received. The Service Fee may be adjusted annually at each anniversary of this Agreement based on the change in the prior year’s Consumer Price Index or on the basis of the year to year percentage change in the per student Full Time Equivalent (FTE) funding provided to the school under the law, whichever is less, but in no event shall any adjustment reduce the Service Fee below the initial level of four hundred fifty dollars (\$450) per student FTE per annum as stated above. Service Provider, in its discretion, may waive any annual adjustment and, upon request, will provide such documentation as may be reasonably requested by CharterSchoolCorp to support any waiver of an annual adjustment.

### **26. Additional Services**

Service Provider may provide additional services not covered under this Agreement as requested and approved the Board in writing. This may include services that are not within the regular course of running the School, including but not limited to special projects, litigation coordination, and land use coordination. Such projects may include the engagement, upon written approval and at the expense of CharterSchoolCorp, of other professionals or consultants who may be independent from Service Provider or part of Service Provider’s network of consulting professionals.

### **27. Reimbursement of Costs**

Service Provider may be reimbursed for actual costs incurred in connection with travel, lodging, and food, attending required conferences and other events on behalf of the School, provided that the Board shall give prior written approval for such cost.

### **28. Incurred Expenses**

Pursuant to the agreement of the Board and Service Provider, Service Provider, in its discretion, may defer some or all of the service fees and/or costs for additional services and/or reimbursements due hereunder from one fiscal year to the next, which will be duly noted in the schools financial records.

## **OTHER MATTERS**

### **29. Conflicts of Interest**

No officer, shareholder, employee or director of Service Provider may serve on the Board. Service Provider will comply with the Conflicts of Interest rules set out in the Charter. In addition, if there exists some relationship between Service Provider, its officers, directors or principals and any other person or entity providing goods or services to the School, Service Provider shall disclose the relationship to the Board.

### **30. Insurance and Indemnification**

Service Provider shall carry liability insurance and indemnify the School for acts or omissions of Service Provider, its officers, directors, employees, agents, or assigns. Service Provider agrees to provide, upon request of the Board, certificates evidencing such insurance and naming CharterSchoolCorp, and its Board as additional insured. In the event CharterSchoolCorp and/or School shall, without fault on its part, be made a party to any litigation commenced by or against Service Provider, whether founded in tort, contract, or otherwise, then Service Provider shall protect and hold CharterSchoolCorp and/or School, as applicable, harmless and shall pay all costs, expenses, and attorney's fees incurred by School in connection with such litigation including any appeals. CharterSchoolCorp and School shall carry liability insurance and indemnify the Service Provider for acts or omissions of CharterSchoolCorp and School, its officers, directors, employees, agents, or assigns. School agrees to provide, upon request of the Service Provider, certificates evidencing such insurance and naming Service Provider as additional insured. In the event Service Provider shall, without fault on its part, be made a party to any litigation commenced by or against School, whether founded in tort, contract, or otherwise, then School shall protect and hold Service Provider harmless and shall pay all costs, expenses, and attorney's fees incurred by Service Provider in connection with such litigation including any appeals.

Notwithstanding the above, nothing in this provision shall operate to release either the Service Provider or the School from its own affirmative duties with respect to this Agreement, and neither party is obligated to indemnify the other party for the other party's wrongful or tortious conduct. Notwithstanding any other term in this Agreement, this Agreement and all provisions contained herein shall be subject to and governed by Section 15-193, Arizona Revised Statutes, as amended, and by the School's rights and protections under that statute.

### **31. Miscellaneous**

- (1) Neither party shall be considered in default of this Agreement if the performance of any

**SOMERSET ARIZONA - ACADEMICA ARIZONA - EDUCATIONAL SERVICES AND SUPPORT AGREEMENT - P. 11 OF**

part or all if this Agreement is prevented, delayed, hindered or otherwise made impracticable or impossible by reason of any strike, flood, hurricane, riot, fire, explosion, war, act of God, sabotage, accident or any other casualty or cause beyond either party's control, and which cannot be overcome by reasonable diligence and without unusual expense.

(2) This Agreement shall constitute the full, entire and complete agreement between the parties hereto. All prior representations, understandings and agreements are superseded and replaced by this

Agreement. This Agreement may be altered, changed, added to, deleted from or modified only through the voluntary, mutual consent of the parties in writing, and said written modification(s) shall be executed by both parties. Any amendment to this Agreement shall require approval of the Board.

(3) Neither party shall assign this Agreement without the written consent of the other party;

(4) No waiver of any provision of or default under this Agreement shall be deemed or shall constitute a waiver of any other provision or default unless expressly stated in writing.

(5) If any provision or any part of this Agreement is determined to be unlawful, void or invalid, that determination shall not affect any other provision or any part of any other provision of this Agreement and all such provisions shall remain in full force and effect.

(6) This Agreement is not intended to create any rights of a third party beneficiary.

(7) This Agreement is made and entered into in the State of Arizona and shall be interpreted according to and governed by the laws of that state, without regard to its conflicts of laws rules. Any action arising from this Agreement, shall be brought in a court in Arizona.

(8) In the event of a dispute arising from this Agreement, the prevailing party shall be awarded reasonable attorneys' fees and costs.

(9) Every notice, approval, consent or other communication authorized or required by this Agreement shall not be effective unless same shall be in writing and sent postage prepaid by United States mail, directed to the other party at its address hereinafter provided or such other address as either party may designate by notice from time to time in accordance herewith:

ACADEMICA ARIZONA LLC  
6340 Sunset Drive  
Miami, Florida 33143

SOMERSET ACADEMY ARIZONA, INC.  
20801 JOHNSON STREET  
PEMBROKE PINES, FL 33029

(10) The headings in the Agreement are for convenience and reference only and in no way define, limit or describe the scope of the Agreement and shall not be considered in the interpretation of the Agreement or any provision hereof.

(11) This Agreement may be executed in any number of counterparts, each of which shall be an original, but all of which together shall constitute one Agreement.

(12) Each of the persons executing this Agreement warrants that such person has the full power and authority to execute the Agreement on behalf of the party for whom he or she signs.

THIS AGREEMENT was approved at a meeting of the Board of Directors of Somerset Academy, Inc. held on the \_\_\_\_\_ day of \_\_\_\_\_ 2017. At that meeting, the undersigned Director or officer of Somerset Academy, Inc. was authorized by the Board to execute a copy of this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Contract as of the day and year first above written.

**SOMERSET ACADEMY, INC.**

By: \_\_\_\_\_

Date: \_\_\_\_\_

Lourdes Isla, Governing Board Chair

**ACADEMICA BROWARD LLC**

By: \_\_\_\_\_

Date: \_\_\_\_\_

Fernando Zulueta, Authorized Signor

**B.3.2**

## **Contracted Services**

## B.3.2 Contracted Services

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**a) Delineate all areas, for which the Applicant plans to contract with a service provider.**

SAWV will be contracting for ongoing outside expertise in order to be efficient with its resources rather than developing internal expertise for certain functions. The ESP will provide the services outlined in **Section B.3.1** and will assist the school in selecting and managing outside expertise for the following:

- **Special Education Services** – school psychologist, occupational therapy services, speech language services, and physical therapy services.
- **Information Technology Services** – network, hardware, & software installation; continual troubleshooting & repairs/maintenance.
- **Legal Services** – business/tax/regulatory issues.
- **Food Services** – National School Lunch Program & School Breakfast Program.
- **Substitute Teacher Services**
- **Audit Services** – auditing of school finances for annual reporting, IRS reporting, and legal compliance.
- **Facility Maintenance** – AC repairs & maintenance, pest control, lawn care, etc.

**b) Identify the minimum professional qualifications and/or experience expected of those to be retained to perform each listed contracted service.**

The ESP will help research vendors, obtain multiple bids, and present them to the governing board. In order to ensure the school is contracting with high quality providers, the governing board will be expecting specific professional standards when determining who to contract with. These standards include: the expertise necessary to match the school's needs; the competence of the vendor to be judged by applicable credentials, reference checks, the Better Business Bureau, and customer reviews; and the price to ensure the services reflect the cost. Academica has extensive experience in assisting governing boards in finding these services and is knowledgeable about how much these services cost. SAWV, as well as Academica, will utilize the Arizona Charter School Association's Charter Marketplace in order to find vetted vendors that are familiar with Arizona charter schools and are viable and adequate to meet the needs of the student population.

**Educational Service Provider**

The ESP will need to have vast expertise in providing bookkeeping and accounting services, in HR services, student recruitment strategies, board facilitation including public meeting compliance, facilities acquisition, and legal compliance. As outlined in **Section B.3.1**, Academica has been selected as the ESP because it has the expertise necessary and the capacity to support Somerset Academy of the West Valley.

➤ **Qualifications**

- Strong commitment to, belief in, and alignment with the school's mission and vision
- Expertise in bookkeeping, accounting services, HR, student recruitment, board facilitation, facility acquisition, and legal compliance.
- Affordability

**Special Education Services**

The school's special education program will utilize both on-staff certified special education teachers as well as contracted special education services as needed to serve the school's students with disabilities. SAWV plans to hire one Special Education Teacher to be employed at the school during B.3.2 Contracted Services-revised    Somerset Academy Arizona, Inc.

the first year of operation, and to hire an additional Special Education Teacher for Year 2 & Year 3 anticipating an increase in the special education student population as enrollment increases. The role of the Special Education Teacher will be to meet the needs of the students in their classroom. Even though SAWV will employ certified Special Education Teachers, several special education services may need to be provided by contracted service providers. Student needs will dictate the special education services that are obtained. The School will employ service providers who meet all licensure and/or certification requirements that apply to the related services area. Speech-language, occupational, and physical therapy services will be contracted services that the School may provide for students who qualify for those services. Similarly, all personnel who provide related services (e.g. psycho-social counseling will be provided by a psychologist, social worker or mental health professional, etc.) to students will meet all required licensure and/or certification requirements pertaining to their area of related service. The ESP will continuously monitor the special education program in order to insure all requirements & qualifications are being met.

➤ ***Qualifications***

- Strong commitment to, belief in, and alignment with the school's mission and vision
- Arizona Special Education certificate
- Arizona fingerprint clearance card
- Referrals from other schools
- Expertise in federal and state special education compliance
- Affordability
- Arizona charter school experience

***Information Technology Services***

SAWV plans to contract with an information technology service provider to conduct technology services, which includes but may not be limited to: network, hardware, & software installation; and continual troubleshooting repairs/maintenance.

➤ ***Qualifications***

- Strong commitment to, belief in, and alignment with the school's mission and vision
- All requisite licenses and certification available upon request
- Referrals from other schools/experience with Arizona charter schools
- Affordability

***Legal Services***

SAWV aims to contract with one or more legal firms to provide legal expertise for any school specific issues that may arise during the schools' operation. SAWV will research firms endorsed by the Arizona Charter School Association/Charter Marketplace to ensure quality legal services. The following are the criteria when determining a legal service provider:

➤ ***Qualifications***

- Strong commitment to, belief in, and alignment with the school's mission and vision
- All requisite licenses and certification available upon request
- Referrals from other schools/experience with Arizona charter schools
- Affordability

***Food Services***

SAWV will contract with a food service provider to provide food services. The following are the criteria when determining a contracted food service provider:

➤ ***Qualifications***

- Strong commitment to, belief in, and alignment with the school's mission and vision

- All requisite licenses and certification available upon request
- Arizona fingerprint clearance card for any personnel interacting with students.
- Abiding by the Arizona Nutrition Standards
- Referrals from other schools/experience with Arizona charter schools
- Affordability in line with reimbursement rates for applicable programs.

### ***Substitute Teacher Services***

SAWV will contract with a staffing agency similar to Kelly Educational Staffing for substitute teachers. The following are the criteria when determining a substitute teacher service provider:

#### ➤ ***Qualifications***

- Strong commitment to, belief in, and alignment with the school's mission and vision
- All requisite licenses and certification available upon request
- Arizona fingerprint clearance card
- Referrals from other schools/experience with Arizona charter schools
- Affordability

### ***Audit Services***

An accounting firm that is familiar with federal and state accounting practices and that is familiar with Arizona charter school audits, preferably charter schools, will provide Somerset Academy of the West Valley's annual audit. The following are the criteria when determining an audit service provider:

#### ➤ ***Qualifications***

- Strong commitment to, belief in, and alignment with the school's mission and vision
- All requisite licenses and certification available upon request
- Referrals from other schools/experience with Arizona charter schools
- Affordability

### ***Facility Maintenance***

SAWV will enter into contracts for a/c repair, pest control, lawn care, among other facility maintenance contracts based upon the needs of the school. SAWV will receive multiple bids before making their selection, and will reach out to vendors listed in the Charter Marketplace to request bids. The following are the criteria when determining any services associated with facility maintenance:

#### ➤ ***Qualifications***

- Strong commitment to, belief in, and alignment with the school's mission and vision
- All requisite licenses and certification available upon request
- Referrals from other schools/experience with Arizona charter schools
- Affordability

### ***c) Provide clear and specific sources for costs of each listed contracted service.***

#### ***Educational Service Provider***

As outlined in **Section B.3.1**, Academica has been selected as the ESP because it has the expertise necessary and the capacity to support Somerset Academy of the West Valley. Academica charges a flat fee of \$450 per weighted student, per year during the term of the agreement. The service fee may be payable in equal monthly installments. The ESP does not charge a percentage of revenue or income received by the charter school and does not receive any other compensation from the school. As the number of students enrolled increases, Academica's services necessarily increase as well. For example, a larger student body requires a larger facility and a consequential increase in facilities management services. A larger student body requires more staff and an increase in Human

Resources related services. A larger student body requires more equipment and fixtures which creates an increase in procurement, budget management and bookkeeping services. Furthermore, since the fee is not a percentage of income, the fee does not increase with any increase in school funding which may be passed by the state legislature. Finally, the Academica contract contains a provision that allows the fee to be adjusted if the school is facing financial hardship.

	<b>Year</b>	<b>Rate per-pupil</b>	<b>Student Counts</b>	<b>Annual Cost</b>
<b>Academica Nevada Management Agreement:</b>	1	\$ -	264	\$ -
	2	\$ 100.00	374	\$ 37,400.00
	3	\$ 200.00	506	\$ 101,200.00

### ***Special Education Services***

Somerset Academy of the West Valley assumes 12% of students have a special education need based on the target student population. This approach is used for planning purposes as specific needs will not be known until students are evaluated. Prices below reflect the pricing provided by Ridge Zellar Therapy, a therapy services group who provide comprehensive hearing screenings, trainings & in-services, psychoeducational services, occupational therapy, and speech therapy.

		<b>\$/hr</b>	<b>Chance %</b>
Psychologist	\$ 72.00	15%	
Speech Therapist	\$ 63.00	8%	
Physical Therapy	\$ 72.00	2%	
Occupational Therapy	\$ 72.00	5%	

<b>Year 1</b>					
	<b># of Students</b>	<b>Reevaluation Tests</b>	<b>Initial Tests</b>	<b>Total Cost</b>	
Psychologist	40	\$ 6,600.00	\$ 2,500.00	\$ 9,100.00	
	<b># of Students</b>	<b>Hours</b>	<b>Total Cost</b>		
Speech Therapist	21	140	\$ 8,820.00		
Physical Therapy	5	25	\$ 1,800.00		
Occupational Therapy	13	87	\$ 6,240.00		
			<b>Total: \$ 25,960.00</b>		

<b>Year 2</b>					
	<b># of Students</b>	<b>Reevaluation Tests</b>	<b>Initial Tests</b>	<b>Total Cost</b>	
Psychologist	56	\$ 9,333.33	\$ 2,500.00	\$ 11,833.33	
	<b># of Students</b>	<b>Hours</b>	<b>Total Cost</b>		
Speech Therapist	30	200	\$ 12,600.00		
Physical Therapy	7	35	\$ 2,520.00		
Occupational Therapy	19	127	\$ 9,120.00		
			<b>Total: \$ 36,073.33</b>		

<b>Year 3</b>					
	<b># of Students</b>	<b>Reevaluation Tests</b>	<b>Initial Tests</b>	<b>Total Cost</b>	
Psychologist	76	\$ 12,666.67	\$ 2,500.00	\$ 15,166.67	
	<b># of Students</b>	<b>Hours</b>	<b>Total Cost</b>		
Speech Therapist	40	267	\$ 16,800.00		
Physical Therapy	10	50	\$ 3,600.00		
Occupational Therapy	25	167	\$ 9,120.00		
			<b>Total: \$ 44,686.67</b>		

### ***Information Technology Services***

SAWV plans to contract with an IT service provider similar to Intellatek (IT service provider based in Nevada). Expenses for IT services are based on Intellatek pricing. IT services will include set-up and continual maintenance/monitoring of computers, server, network, firewall and other

technology related hardware. For continual maintenance/monitoring of technology related hardware for the school, a fee of \$3.50 per month per student is necessary to insure quality work is being done and the needs of the school are being met taking into consideration enrollment growth (equates to \$42.00 per year per student).

	<b>Year</b>	<b>Rate per-pupil</b>	<b>Student Counts</b>	<b>Set-Up Fees</b>	<b>Annual Cost</b>
<b>Information Technology Services</b>	1	\$ 42.00	264	\$ 5,000.00	\$ 16,088.00
	2	\$ 42.00	374	\$ 2,500.00	\$ 18,208.00
	3	\$ 42.00	506	\$ 2,500.00	\$ 23,752.00

SAWV plans to contract with a similar IT service provider that can provide equal/better services at an equal/similar affordable price; insuring all qualifications the school requires are being met.

### ***Legal Services***

SAWV aims to contract with one or more legal firms to provide legal expertise for any school specific issues that may arise during the schools' operation. Pricing is based on the rates given by Wolfe & Wyman LLP a law firm, who has and is currently serving charter schools similar in size of the proposed charter. SAWV will research firms endorsed by the Arizona Charter School Association/Charter Marketplace to ensure quality legal services, which include business/tax/regulatory issues; priced at \$2,000 in Year 1 and \$5,500 each year thereafter.

	<b>Year</b>	<b>Annual Cost</b>
<b>Legal Services</b>	1	\$ 2,000.00
	2	\$ 5,500.00
	3	\$ 5,500.00

### ***Food Services***

As outlined in **Section A.2**, SAWV projects that 50% of the student population will qualify for free and reduced lunch, as the school assumes it will qualify for reimbursed student meals from the National School Lunch Program and School Breakfast Program. Assumes that meals will be paid for by students not eligible for these programs. SAWV will abide by the Arizona Nutritional Standards. The amount of \$1,000 per year has been budgeted in Years 1 - 3 for any potential overages or one-time costs associated with providing food services. SAWV may look to offer food services for kids not eligible for the National School Lunch Program and School Breakfast Program in the future.

	<b>Year</b>	<b>Annual Cost</b>
<b>Food Services</b>	1	\$ 1,000.00
	2	\$ 1,000.00
	3	\$ 1,000.00

### ***Audit Services***

An accounting firm that is familiar with federal and state accounting practices and is familiar with Arizona charter school audits, preferably charter schools, will provide SAWV's annual audit. SAWV will not incur an audit fee in the first year of operation as the first audit will take place in September following the first fiscal year. SAWV will search for a firm familiar with Arizona charter schools, but based pricing on the rates given by Binder Dijker Ote (BDO), an accounting firm, who has and is currently serving charter schools similar in size of the proposed charter. The auditing services provided, which include the auditing of school finances for annual reporting, IRS reporting, and legal compliance; are priced at \$15,000 per year.

	<b>Year</b>	<b>Annual Cost</b>
<b>Audit Services</b>	1	\$ -
	2	\$ 15,000.00
	3	\$ 15,000.00

### ***Substitute Teacher Services***

SAWV will contract with a staffing agency for substitute teachers. Pricing is based on the rates given by Kelly Educational Staffing, an experienced provider of substitute teachers nationwide, who has and is currently serving charter schools similar in size of the proposed charter. The substitute teacher services provided, which include educational staffing and placement needs; are priced at \$150 per day, for 10 days per teacher.

	<b>Year</b>	<b># of Teachers</b>	<b>Cost (per day)</b>	<b># of days (per teacher)</b>	<b>Annual Cost</b>
<b>Substitute Teacher Services</b>	1	15	\$ 165.00	10	\$ 24,750.00
	2	21	\$ 165.00	10	\$ 33,825.00
	3	27	\$ 165.00	10	\$ 44,550.00

### ***Facility Maintenance***

SAWV will enter into contracts for a/c repair, pest control, lawn care, among other facility maintenance contracts based upon the needs of the school. SAWV will receive multiple bids before making their selection, and will reach out to vendors listed in the Charter Marketplace to request bids. Pricing is dependent upon the finalization of the facility lease with Skyway Church, as certain maintenance aspects may not be needed. Facility Maintenance includes the Building & Improvements line item as well as the Land & Improvements line item on the Start-up and Three Year Operational Budget; and the amounts account for basic facility maintenance to otherwise be reviewed once the school is established in the facility.

	<b>Year</b>	<b>Annual Cost</b>
<b>Facility Maintenance</b>	Start-up	\$ 3,500.00
	1	\$ 4,000.00
	2	\$ 7,500.00
	3	\$ 7,500.00

- d) Describe how the costs associated with each listed contracted service are viable and adequate for the target population identified in A.2.**

Based on the information provided by vendors and charter schools of similar size, these figures are viable and adequate for the target population of SAWV. **Figure B.3.2.1** provides a summary of each of the above contracted services along with the cost of each of these services for startup and the first three years of SAWV's operation.

**Figure B.3.2.1**  
**Associated Costs**

Service Provider	Quoted Service Provider	Service	Start-Up	Year 1	Year 2	Year 3
Academica	Academica	Educational Service Provider	N/A	\$ -	\$ 37,400.00	\$ 101,200.00
TBD	Ridge Zellar	Special Education Services	N/A	\$ 25,960.00	\$ 36,073.33	\$ 44,686.67
TBD	Intellatek	Informational Technology Services	N/A	\$ 16,088.00	\$ 18,208.00	\$ 23,752.00
TBD	Wolfe & Wyman LLP	Legal Services	N/A	\$ 2,000.00	\$ 5,500.00	\$ 5,500.00
TBD	TBD	Food Services	N/A	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
TBD	Kelly Educational Staffing	Substitute Teaching Services	N/A	\$ 24,750.00	\$ 33,825.00	\$ 44,550.00
TBD	Binder Dijker Ote (BDO)	Audit Services	N/A	\$ -	\$ 15,000.00	\$ 15,000.00
TBD	TBD	Facility Maintenance	\$ 3,500.00	\$ 4,000.00	\$ 7,500.00	\$ 7,500.00

- e) Ensure Costs are described in the Budget Assumptions and included in the Start-Up and Three-Year Operational Budget as appropriate.**

The costs are described in the Budget Assumptions section and are included in the Start-up and Three Year Operational Budget.

# **Business Plan**

- **C.1 Facilities Acquisition**
- **C.2 Marketing and Student Enrollment**
- **C.3 Personnel**
- **C.4 Start Up Budget**
- **C.5 Three Year Operational Budget**

**C.1**

# **Facilities Acquisition**

## C.1 Facilities Acquisition

---

- a) Identify a timeframe for securing an appropriate facility consistent with the Target Start Date identified on the Target Population Page.

The Board of Somerset Academy of the West Valley plans to engage an experienced charter school facilities developer to acquire, design, plan and/or construct facilities for lease, which are appropriate to the needs of the School. The School would need a one or multi-story structure built or renovated to meet all requisite codes and life-safety regulations set forth by the applicable governing agency.

The Governing Board will direct its ESP to bring to the Board a recommendation for a quality educational facility to be leased by the School.

### ***Projected Schedule***

June - Sept	Facility Identification
Oct - Dec	Facilities Negotiations. The school will finalize negotiations upon receiving charter approval by Sponsoring District
Jan - April	Execute Lease/Conduct Maintenance and Repairs
May - June	Final Preparations of Facilities
June	Conduct Final Facilities and Safety Inspections

The targeted geographic region is in an area which includes the following zip codes: 85385, 85380, 85345, 85351, 85363, 85307, 85340, 85039, 85392, 85037, 85035, 85033, 85063, 85031, 85311, 85301, 185302, 85312, and 85304.

This allows the school time to make any necessary updates to the site and allow administration to have the school site ready for the 2020-2021 school year. If the school does not find a facility in the timeframe as stated, they will plan on taking a planning year to ensure a safe and secure learning environment is properly prepared for the students.

- b) 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.

The facility will have an adequate number of classrooms designed to meet or exceed all pertinent classroom design standards set forth by the governing agency. The proposed facility will include program elements such as traditional classrooms, art, science and computer labs, multi-media instructional areas, lunch / multi-purpose room, food prep areas, and indoor and outdoor activity spaces.

In the first year, Skyway Academy of the West Valley anticipates serving 264 students in 14 classrooms in Year 1, 374 students in 19 classrooms in Year 2, and 506 students in 25 classrooms in

its third year of operation. In addition to classroom space, the school will have a cafeteria, playground, specials room, media/music room, and gymnasium.

As stated in **A.2 Target Population**, Somerset Academy of the West Valley plans to have a student teacher ratio not exceeding 22:1. Facilities need a minimum sized facility of 31,000 square feet. This model has worked at the other schools supported by Academica and has proven that this provides ample space to meet the needs of the targeted student population.

Below is what an elementary school layout could look like under Somerset Academy.

## **ELEMENTARY SCHOOL**

### **CLASSROOMS**

5	Kindergarten w/ Toilet	770	EA	3,850
25	Standard Classrooms	630	EA	15,750
1	Art / Science Classroom	700	EA	700
1	Music Classroom	800	EA	800

32

### **CLASSROOM SUPPORT**

1	Teacher Work Areas	150	EA	150
1	Art / Science Prep Rooms	150	EA	150
1	Music Storage Room	120	EA	120
4	Toilet Rooms (incl. Janitor's)	360	EA	1,440
1	General Storage Room	100	EA	100

### **ADMINISTRATION (serves K-12)**

2	Reception / Lobby	500	EA	1,000
9	Staff Offices	110	EA	990
2	Conference Room	180	EA	360
2	Nurse's Office w/ toilet	240	EA	480
1	Staff Lounge	700	EA	700
2	Work Room / Copy Room	220	EA	440
2	Storage Room	100	EA	200
4	Staff Toilets	80	EA	320
2	Data Room	110	EA	220

### **MULTI-PURPOSE**

1	MP Room	5,500	EA	5,500
1	MP Storage	300	EA	300
1	Platform	800	EA	800
2	Toilet Rooms	400	EA	800
1	Kitchen	1,200	EA	1,200
1	Kitchen Storage	200	EA	200

**SUB TOTAL PROGRAMMED SPACES** **36,570**

<b>Misc (mech, elec, circulation)</b>	25%	<b>9,143</b>
<b>TOTAL ELEMENTARY SCHOOL SIZE</b>		<b>45,713</b>

*c) Ensure the Layout of Space is consistent with the narrative*

Layout of space is consistent with the narrative

*d) Ensure costs as described in the narrative accounted for in the Start-Up and Three-Year Operational Budgets and fully described in the Assumptions.*

**Building Rent/Lease/Loan:**

**Approx. 17.33% of the budget (Year 1 - Year 3)**

The Somerset Academy West Valley Board will secure a facility lease in time for the commencement of school operations. Somerset Academy West Valley has set aside \$1,025 per pupil for facility rent each year. Assumes Somerset Academy West Valley will utilize a facility of approx. 40,000 sq. ft. The facility will allow for necessary classrooms, computer labs, science labs, multi-purpose room, and office space needed. Academica manages over one-hundred schools nationwide, with a majority that have facilities with the model of adequate square feet per students that the anticipated facility will offer. Year 1 rent total of \$270,600.00, increasing as student enrollment increases. Discussions regarding a facility lease agreement has yet to be finalized; however, this projection provides a more than adequate depiction of the anticipated rental cost.

**Building & Improvements:**

**Approx. 0.18% of the budget (Year 1 - Year 3)**

Somerset Academy West Valley will enter into contracts for a/c repair, pest control, among other building maintenance contracts based upon the needs of the school. Somerset Academy West Valley will receive multiple bids before making their selection, and will reach out to vendors listed in the Charter Marketplace to request bids. Pricing is dependent upon the finalization of a facility lease, as certain maintenance aspects may not be needed. Assumes a Year 1 budget for \$2,500.00 as most building & improvement expenses will be covered using start-up funds; increasing to \$5,000.00 for Years 2 & 3.

**Land Improvements:**

**Approx. 0.10% of the budget (Year 1 - Year 3)**

Somerset Academy West Valley will enter into contracts for lawn care, among other land & improvements contracts based upon the needs of the school. Somerset Academy West Valley will receive multiple bids before making their selection, and will reach out to vendors listed in the Charter Marketplace to request bids. Pricing is dependent upon the finalization of a facility lease, as certain maintenance aspects may not be needed. Assumes a Year 1 budget for \$1,500.00 as most land & improvement expenses will be covered using start-up funds; increasing to \$2,500.00 for Years 2 & 3.

**Fees/Permits:**

**Approx. 0.10% of the budget (Year 1 - Year 3)**

Assumes an annual amount of \$2,000.00 for Year 1 - 3 for fees/permits such as health inspection, fire inspection, and certificate of occupancy. Based on charter schools of similar size.

**Property/Casualty Insurance:**

***Approx. 0.42% of the budget (Year 1 – Year 3)***

Assumes \$750 a month for property/casualty insurance based upon conservative figures provided by The Mahoney Group and by other charter schools working with Academica of similar size. Increasing by 3% each subsequent year thereafter. The first month in Year 1 will be covered under the Start-up Budget.

**Liability Insurance:**

***Approx. 0.42% of the budget (Year 1 – Year 3)***

Assumes \$750 a month for liability insurance based upon conservative figures provided by The Mahoney Group and by other charter schools working with Academica of similar size. Increasing by 3% each subsequent year thereafter. The first month in Year 1 will be covered under the Start-up Budget.

**Utilities (Electric, Gas, Water, Waste):**

***Approx. 3.20% of the budget (Year 1 – Year 3)***

Assumes \$63,000.00 in utility costs for Year 1 based on a total square footage of approximately 40,000 at a rate of \$1.75/square foot. Assumes the school will not utilize the full space available during Year 1. Increasing by 3% each subsequent year thereafter.

- e) *Be consistent with all sections of the application package*
- f) *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.*

Attached is a proposed layout of space that fits the prospective need for Somerset Academy at the West Valley on the intersection of 83<sup>rd</sup> Ave & Glendale Ave. This site is located in the proposed location of Glendale and is 8 acres of land. This land will be able to hold the minimum sized building necessary for the school for the first three years at 31,000 sq ft and allow for additional growth for future years. In order to support the student population and program of instruction the building will consist of the necessary 25 classrooms, gymnasium, specials, cafeteria and media room necessary for the students to learn. This property will give the school the availability to grow with the demand determined by the surrounding neighborhood and the growth of the area. Also attached are other proposed locations that could fit the model described in the narrative similarly to the 83<sup>rd</sup> and Glendale Ave site.

- g) *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.*

N/A

- h) *For an already acquired facility, purchased land or proposed build only: Describe any financial arrangements that have been made for securing the facility.*

N/A

8985 s. eastern  
suite 220  
las vegas, nv 89123  
p 702.456.1070  
f 702.456.7020



LEVEL 2

FLOOR PLANS  
Somerset Academy  
Glendale, Arizona

FLOOR PLANS 1,470 STUDENTS

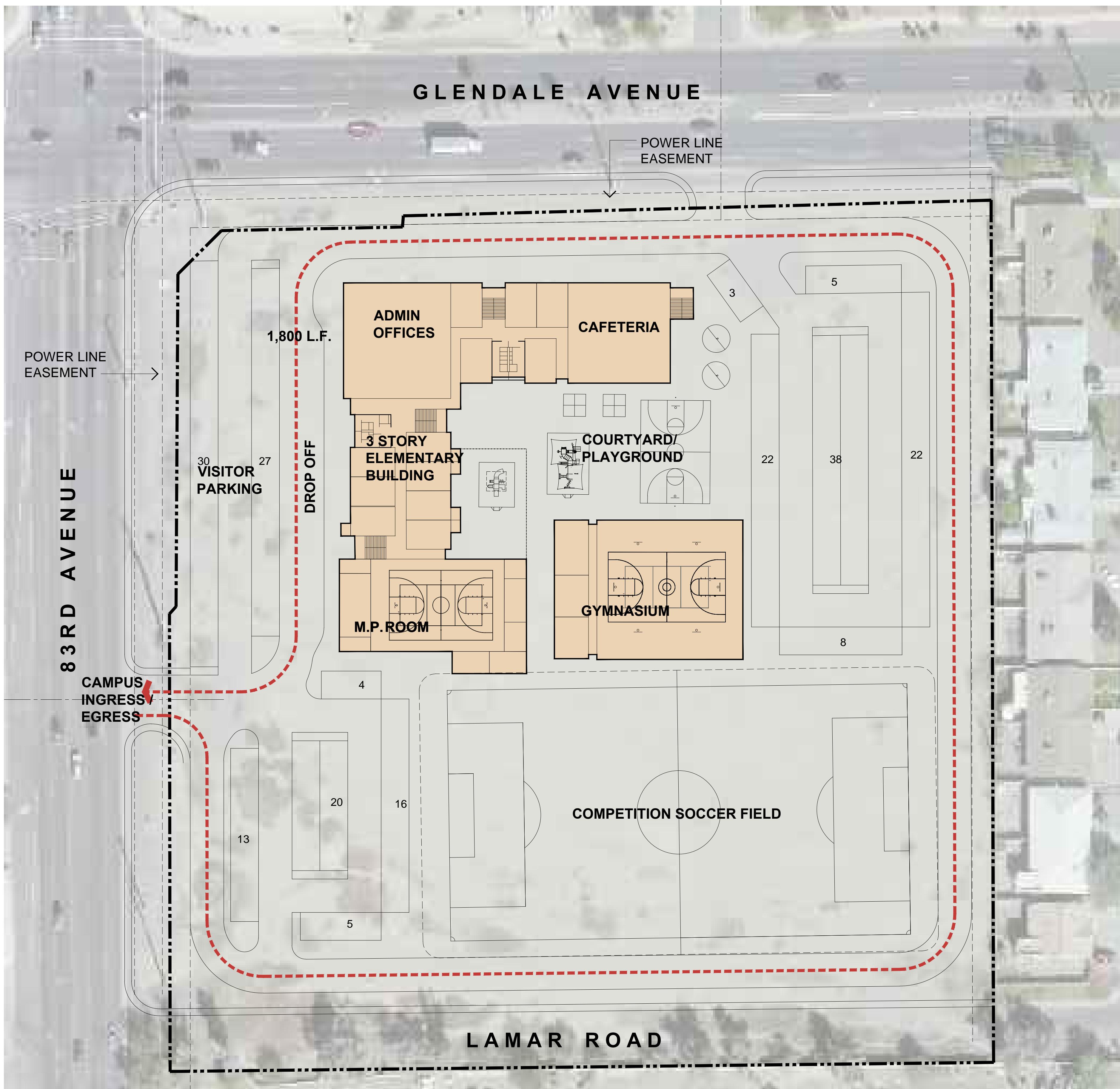
SCALE : 1"=20'-0"

0 10 20 40  
09-11-19

SHT A2.1

north

8985 s. eastern  
suite 220  
las vegas, nv 89123  
p 702.456.1070  
f 702.456.7020



SITE PLAN 1,470 STUDENTS

SCALE : 1"=40'-0"

0 20 40 80 09-11-19

SHT A1.3

#### PROJECT DATA:

JURISDICTION: CITY OF GLENDALE, AZ  
PARCEL NO: 102-05-007M, 102-05-007P, 102-05-007Q,  
102-05-007U, 102-05-007T

CURRENT ZONE: NEIGHBORHOOD SERVICE COMMERCIAL

PROPOSED ZONE: NO CHANGE

NET AREA LOT SIZE: 8.24 AC

BUILDING SIZE: 88,800 SF

BUILDING FOOTPRINT: 48,636 SF

FLOOR AREA RATIO: 24.7%

LOT COVERAGE: 13.5%

#### SETBACKS:

FRONT: 20'-0"  
SIDE: 15'-0"  
REAR: 15'-0"

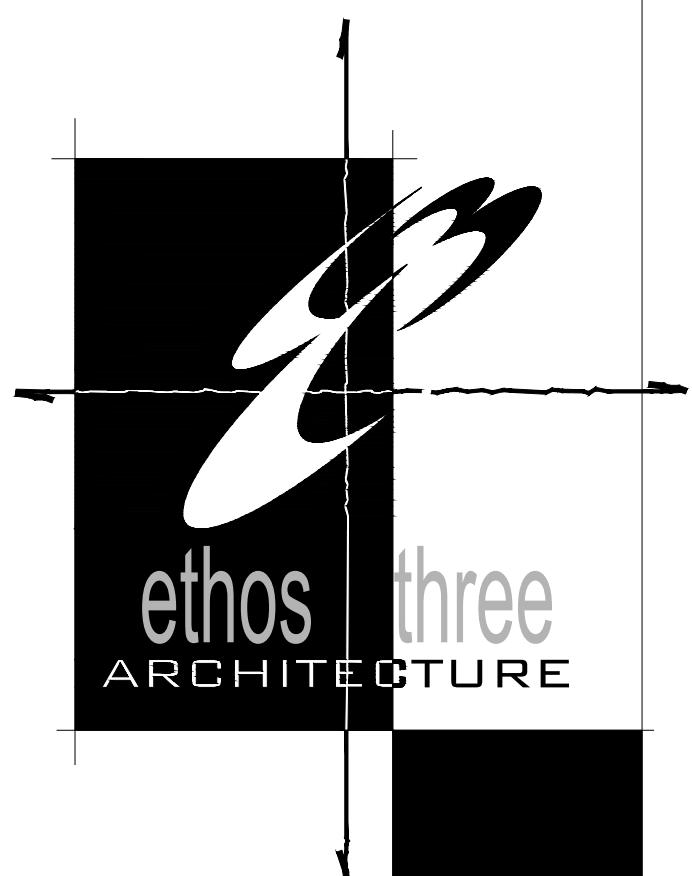
#### LANDSCAPE BUFFERS:

FRONT: 20'-0"  
REAR: 15'-0"  
INTERIOR SIDE: 15'-0"  
STREET SIDE: 20'-0"

#### BUILDING HEIGHT:

#### PARKING REQUIREMENTS:

ELEMENTARY SCHOOL:	2 SPACES / CLASSROOM = 2 x 32 = 64 SPACES
MIDDLE SCHOOL:	3 SPACES / CLASSROOM = 3 x 14 = 42 SPACES
HIGH SCHOOL:	7 SPACES / CLASSROOM = 7 x 15 = 105 SPACES
TOTAL PARKING SPACES REQUIRED:	211 SPACES
TOTAL PARKING SPACES PROVIDED:	213 SPACES
TOTAL ACCESSIBLE SPACES REQUIRED:	4 SPACES INCLUDING 1 VAN SPACE
TOTAL ACCESSIBLE SPACES PROVIDED:	4 SPACES INCLUDING 1 VAN SPACE



SITE PLAN

Somerset Academy  
Glendale, Arizona



Location: Marley Park Promenade  
 West Phoenix Cluster  
 Loop 303/Surprise Submarket  
 Maricopa County  
 Surprise, AZ 85379

Type: Land  
 Proposed Use: Commercial  
 Zoning: PAD, Surprise  
 Density: -

Parcel Size: 603,437 SF  
 Lot Dimensions: -  
 Improvements: -  
 On-Site Improv: -

Developer: -  
 Management: -  
 True Owner: Parkway Bank & Trust Co  
 Recorded Owner: Parkway Bank & Trust Co

Parcel Number: 501-40-974, 501-40-975, 501-40-976, 501-40-977, 501-40-978, 501-40-979, 501-40-981

For Sale: For Sale - Active

NATHAN & ASSOCIATES, INC.  
EXCLUSIVELY PRESENTS

# CACTUS ROAD AND REEMS ROAD MARLEY PARK PROMENADE



NATHAN & ASSOCIATES, INC.  
7600 E. DOUBLETREE RANCH ROAD, SUITE 150  
SCOTTSDALE - ARIZONA - 85258-2156  
OFFICE: 480.367.0700 • FAX: 480.367.8341  
[WWW.NATHANANDASSOCIATESINC.COM](http://WWW.NATHANANDASSOCIATESINC.COM)





# CACTUS ROAD AND REEMS ROAD MARLEY PARK PROMENADE

## LOCATION:

Marley Park Promenade is a commercial corner located at the northeast corner of Cactus Road and Reems Road in Surprise, Arizona.

## SIZE:

±13.85 Acres Total (603,454 Square Feet Total)

Lot	Parcel	Acreage	Square Footage
1	501-40-974	2.558	111,420
2	501-40-975	1.523	66,351
3	501-40-976	4.851	211,342
4	501-40-977	0.804	34,999
5	501-40-978	1.093	47,595
6	501-40-979	1.791	77,999
7	501-40-980		Sold
8	501-40-981	1.234	53,748

## ZONING:

[PAD/City of Surprise](#) (Land Use: Commercial Acreage)

## PRICE:

Submit

## TERMS:

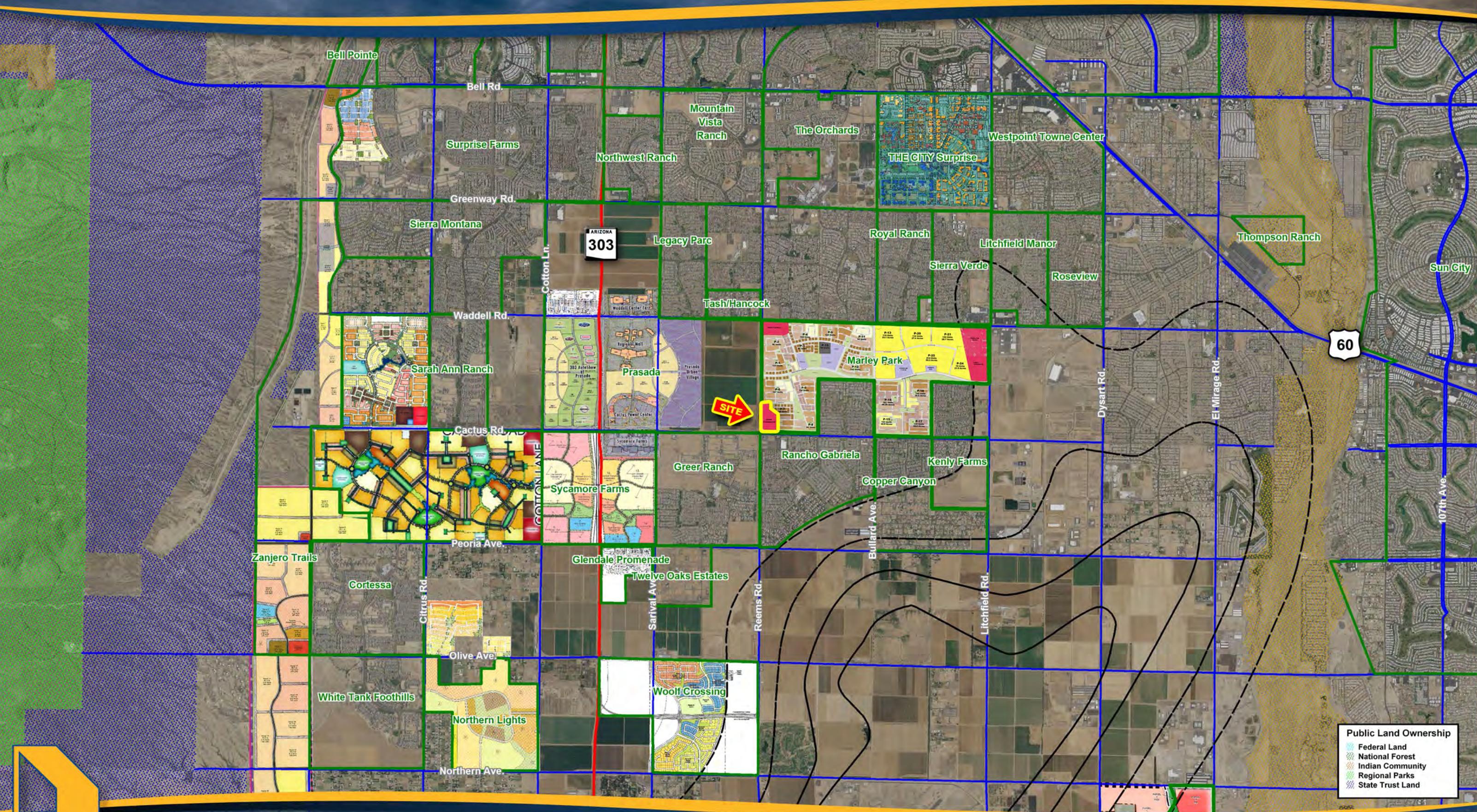
Cash

## COMMENTS:

Located just one mile east of Loop 303 and adjacent to the DMB Masterplanned Community of Marley Park, this acreage offers excellent development opportunities for commercial uses.

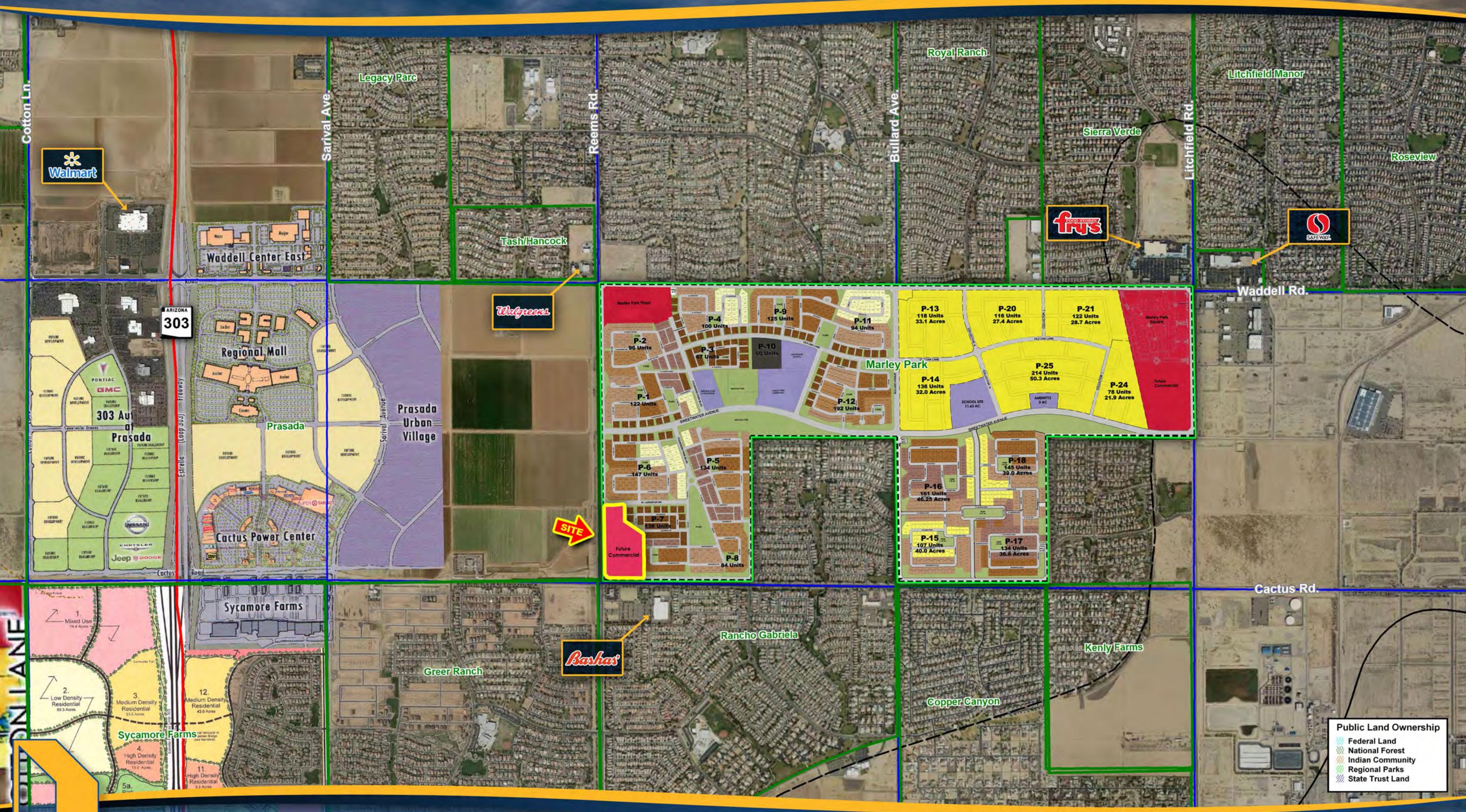
# SURPRISE SUBMARKET

MARLEY PARK PROMENADE | CACTUS ROAD AND REEMS ROAD



# CACTUS ROAD AND REEMS ROAD

## MARLEY PARK PROMENADE

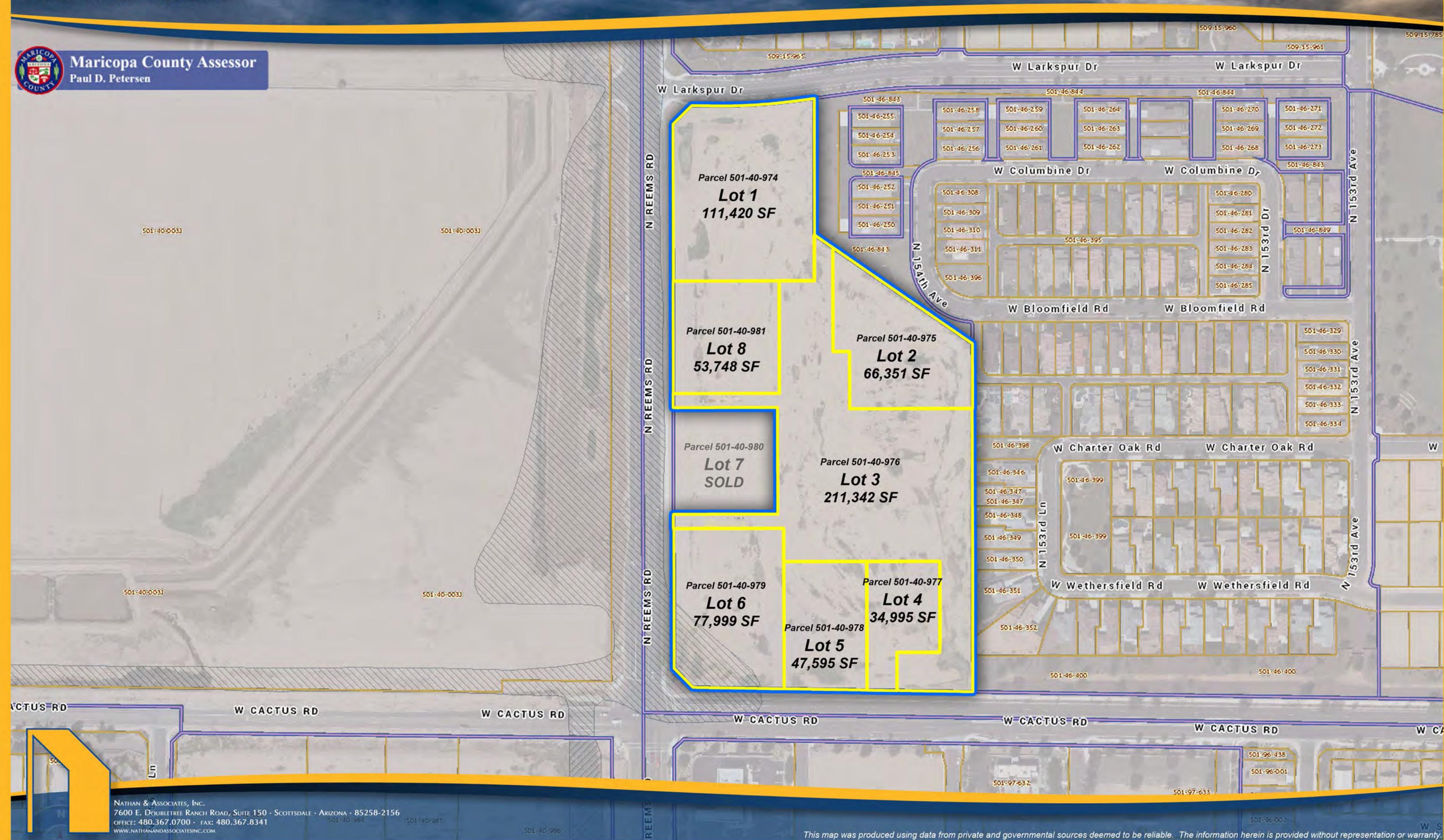


# CACTUS ROAD AND REEMS ROAD

## MARLEY PARK PROMENADE



Maricopa County Assessor  
Paul D. Petersen



# MARLEY PARK PROMENADE CACTUS ROAD AND REEMS ROAD, LOOKING NORTHEAST





Location: Office Park Pads  
Northwest Phoenix Cluster  
Deer Valley/Airport Submarket  
Maricopa County  
Glendale, AZ 85306

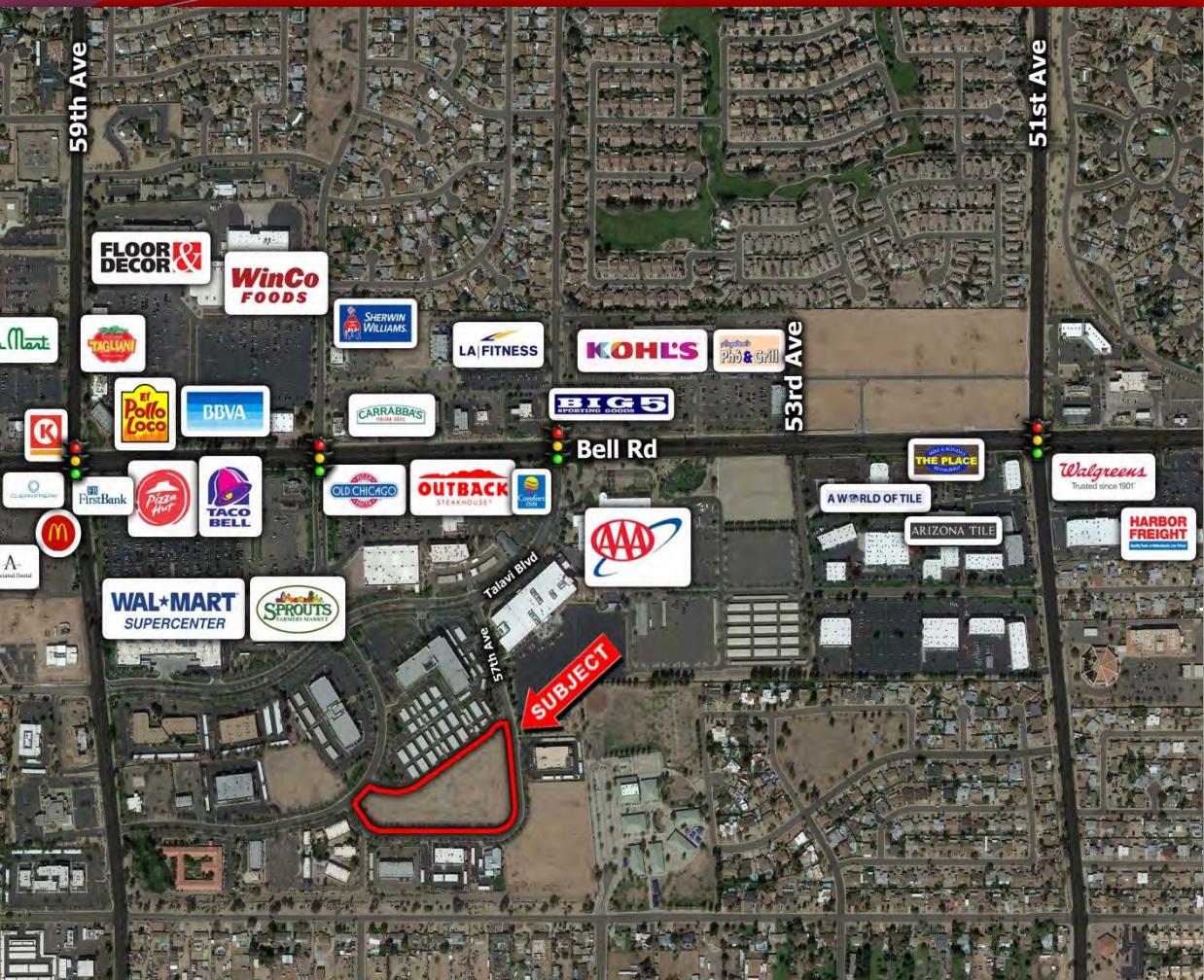
Type: Land  
Proposed Use: -  
Zoning: PAD  
Density: -

Developer: -  
Management: -  
True Owner: -  
Recorded Owner: -

Parcel Size: 268,765 SF  
Lot Dimensions: -  
Improvements: -  
On-Site Improv: -

Parcel Number: 200-50-181A, 200-50-182A, 200-50-183, 200-50-184, 200-50-185, 200-50-186, 200-50-187A

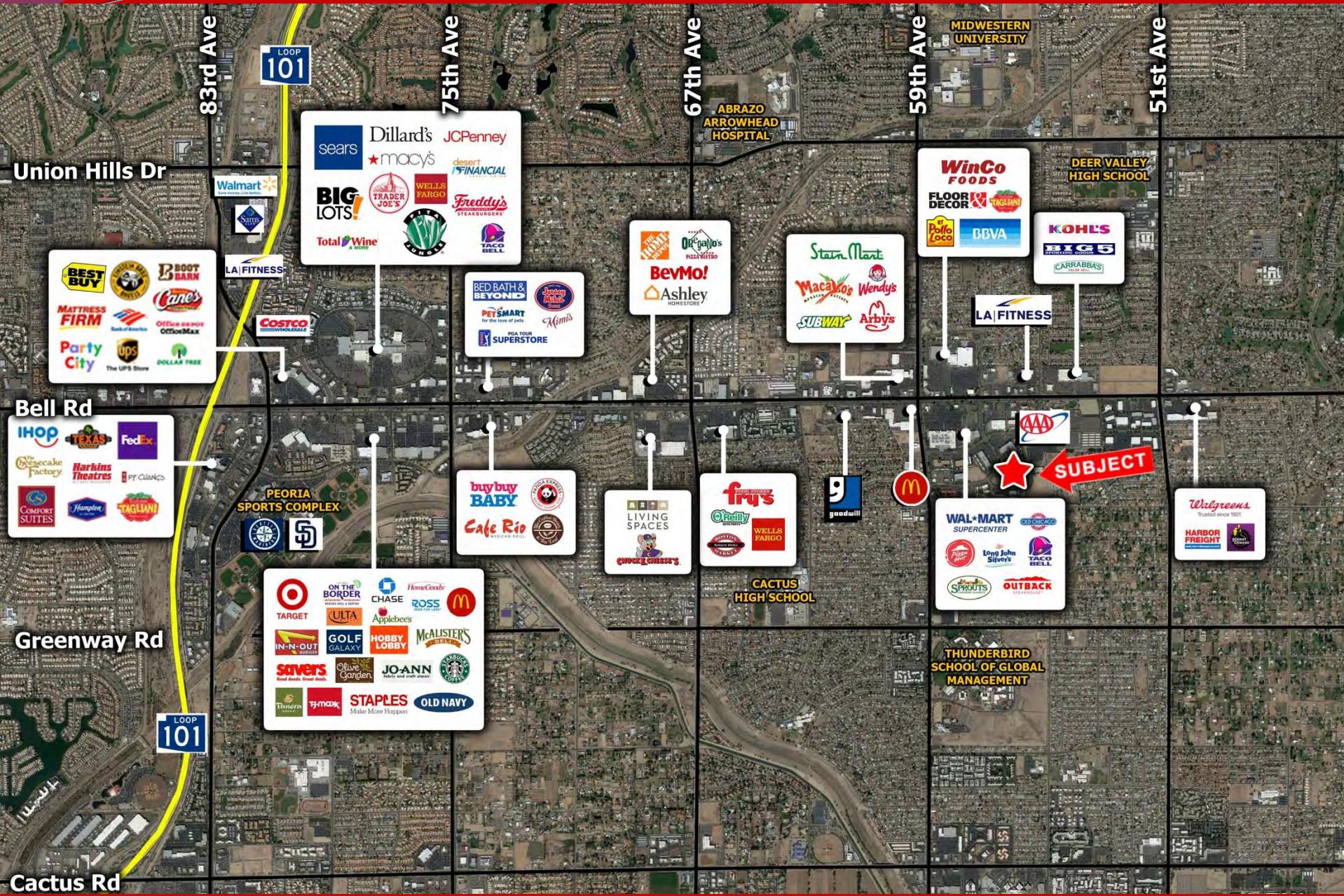
For Sale: For Sale at \$1,343,825 (\$5.00/SF) - Active



+/- 6.17 ACRES

GLENDALE, AZ

- Location:** NEC of 57<sup>th</sup> Ave & Beverly Ln in Glendale, AZ.
- Size:** +/- 6.17 Acres, (268,765 SF)
- Zoning:** PAD – Underlying business park uses
- Price:** \$5.00/per sq ft. All or part.
- Utilities:** All utilities to site
- Comments:** This is one of the last land parcels within the Talavi Business Park Master Plan. With multiple major medical facilities within a few mile radius and limited vacancy of medical office product, this site is prime for medical and other office related uses. Property is already platted and subdivided to 7 separate parcels. Owner will sell all or part.





Location: Marley Park Promenade  
 West Phoenix Cluster  
 Loop 303/Surprise Submarket  
 Maricopa County  
 Surprise, AZ 85379

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 Proposed Use: Commercial  
 Zoning: PAD, Surprise  
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For Sale: For Sale - Active

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# CACTUS ROAD AND REEMS ROAD MARLEY PARK PROMENADE



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# CACTUS ROAD AND REEMS ROAD

## MARLEY PARK PROMENADE

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6	501-40-979	1.791	77,999
7	501-40-980		Sold
8	501-40-981	1.234	53,748

**ZONING:**

[PAD/City of Surprise](#) (Land Use: Commercial Acreage)

**PRICE:**

Submit

**TERMS:**

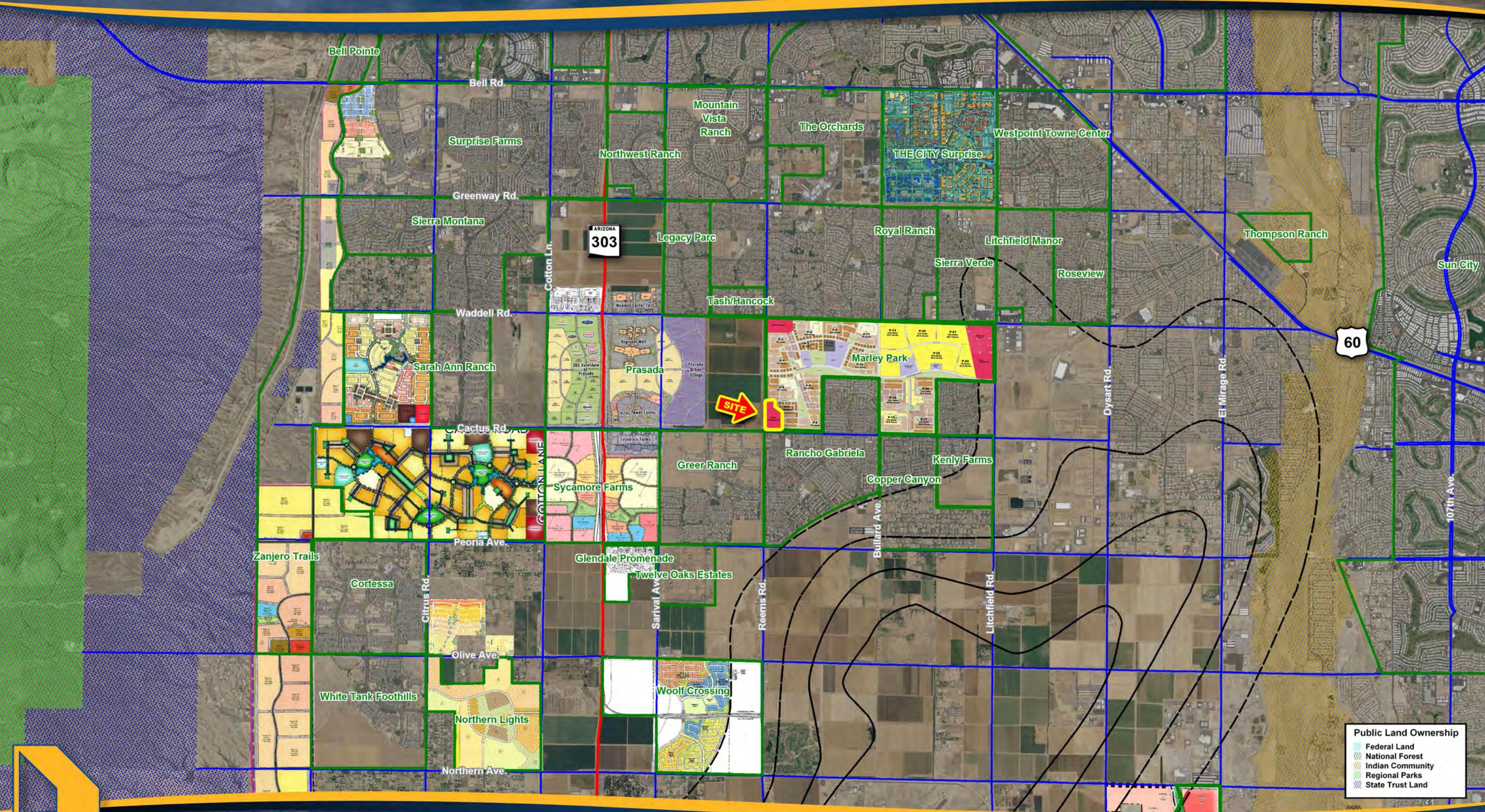
Cash

**COMMENTS:**

Located just one mile east of Loop 303 and adjacent to the DMB Masterplanned Community of Marley Park, this acreage offers excellent development opportunities for commercial uses.

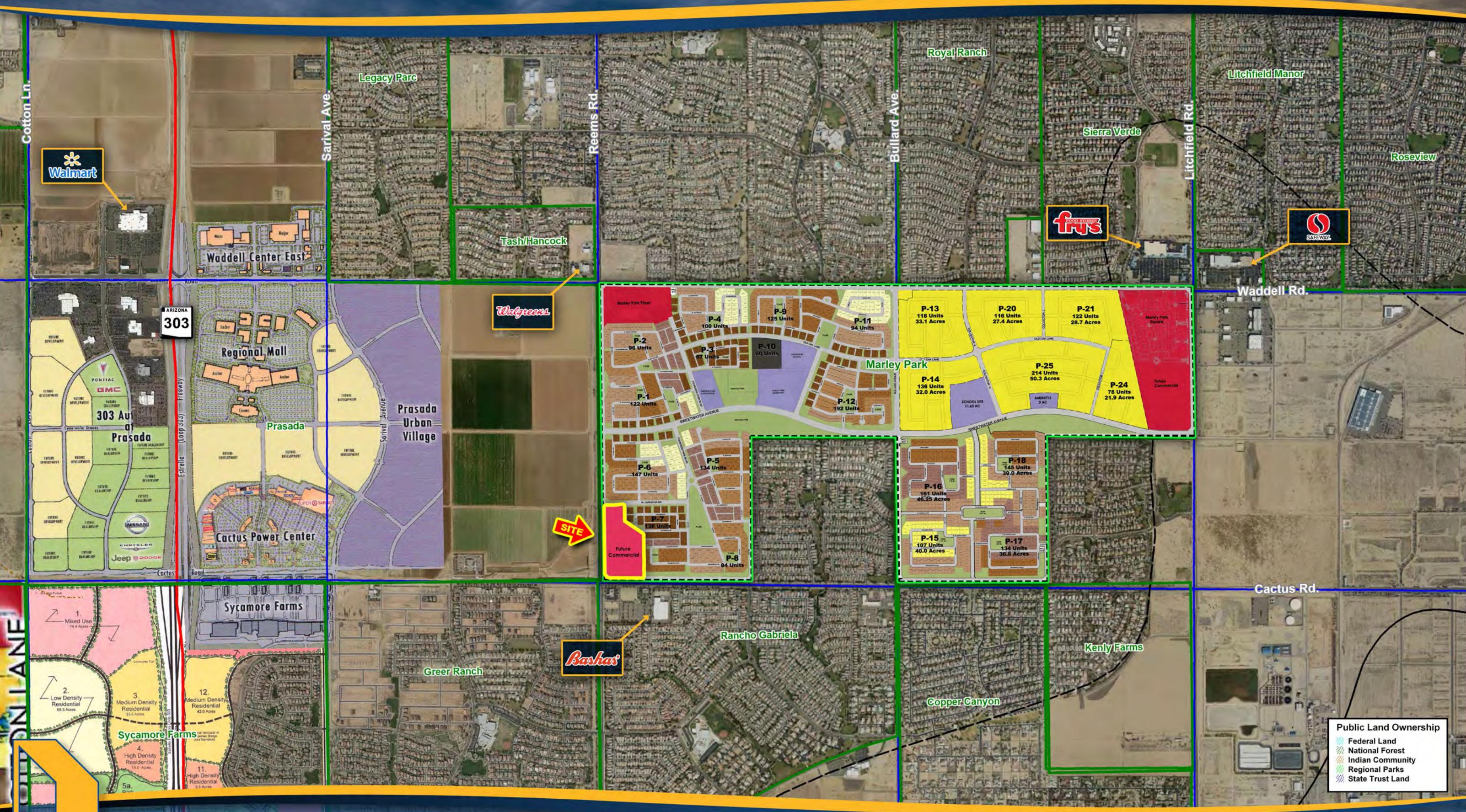
# SURPRISE SUBMARKET

MARLEY PARK PROMENADE | CACTUS ROAD AND REEMS ROAD



# CACTUS ROAD AND REEMS ROAD

## MARLEY PARK PROMENADE

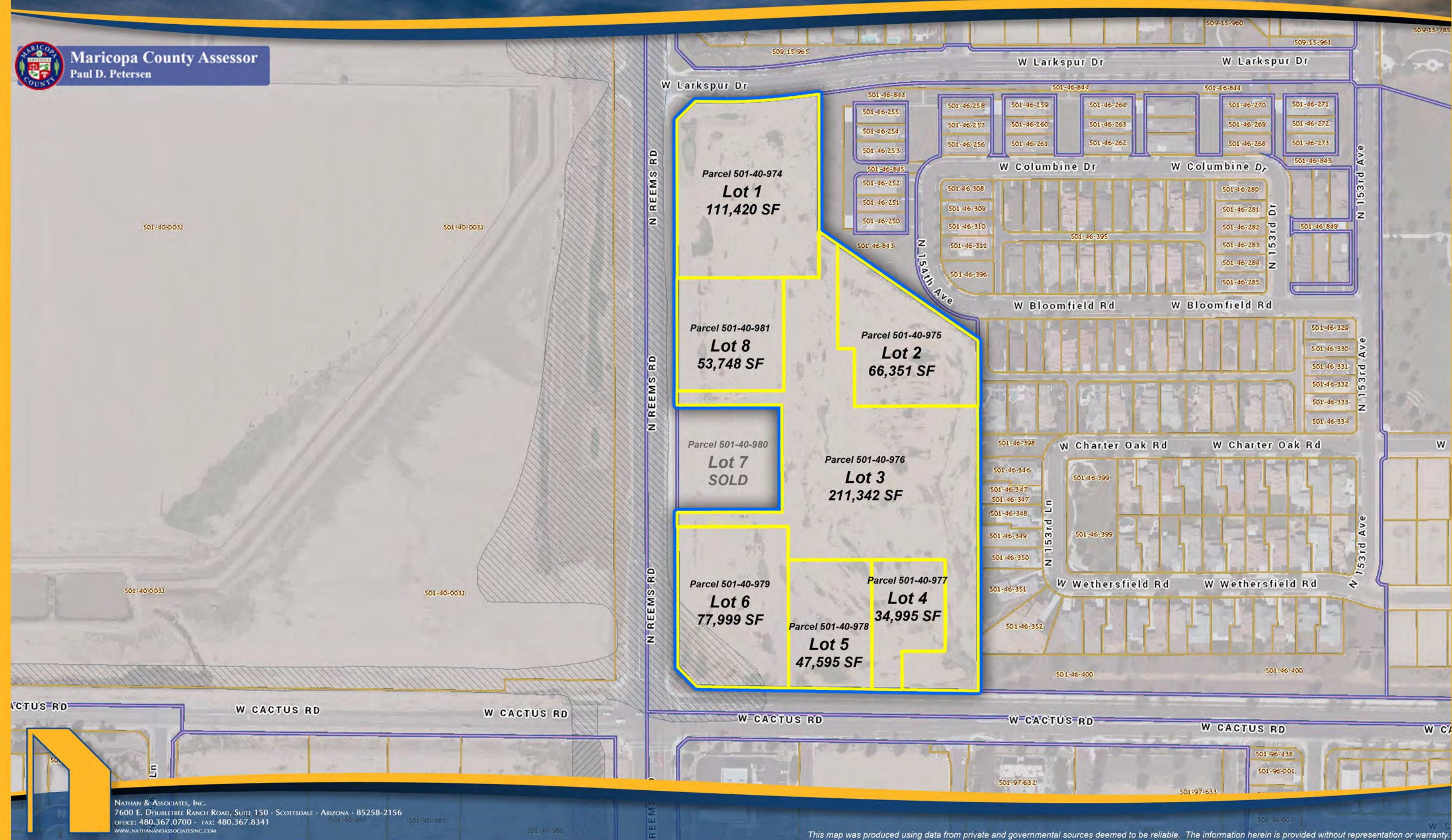


# CACTUS ROAD AND REEMS ROAD

## MARLEY PARK PROMENADE



Maricopa County Assessor  
Paul D. Petersen



# MARLEY PARK PROMENADE CACTUS ROAD AND REEMS ROAD, LOOKING NORTHEAST



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**TODD**  
PHOTOGRAPHIC  
Photo Date: 1.9.2015

This map was produced using data from private and governmental sources deemed to be reliable. The information herein is provided without representation or warranty.



Location: Office Park Pads  
Northwest Phoenix Cluster  
Deer Valley/Airport Submarket  
Maricopa County  
Glendale, AZ 85306

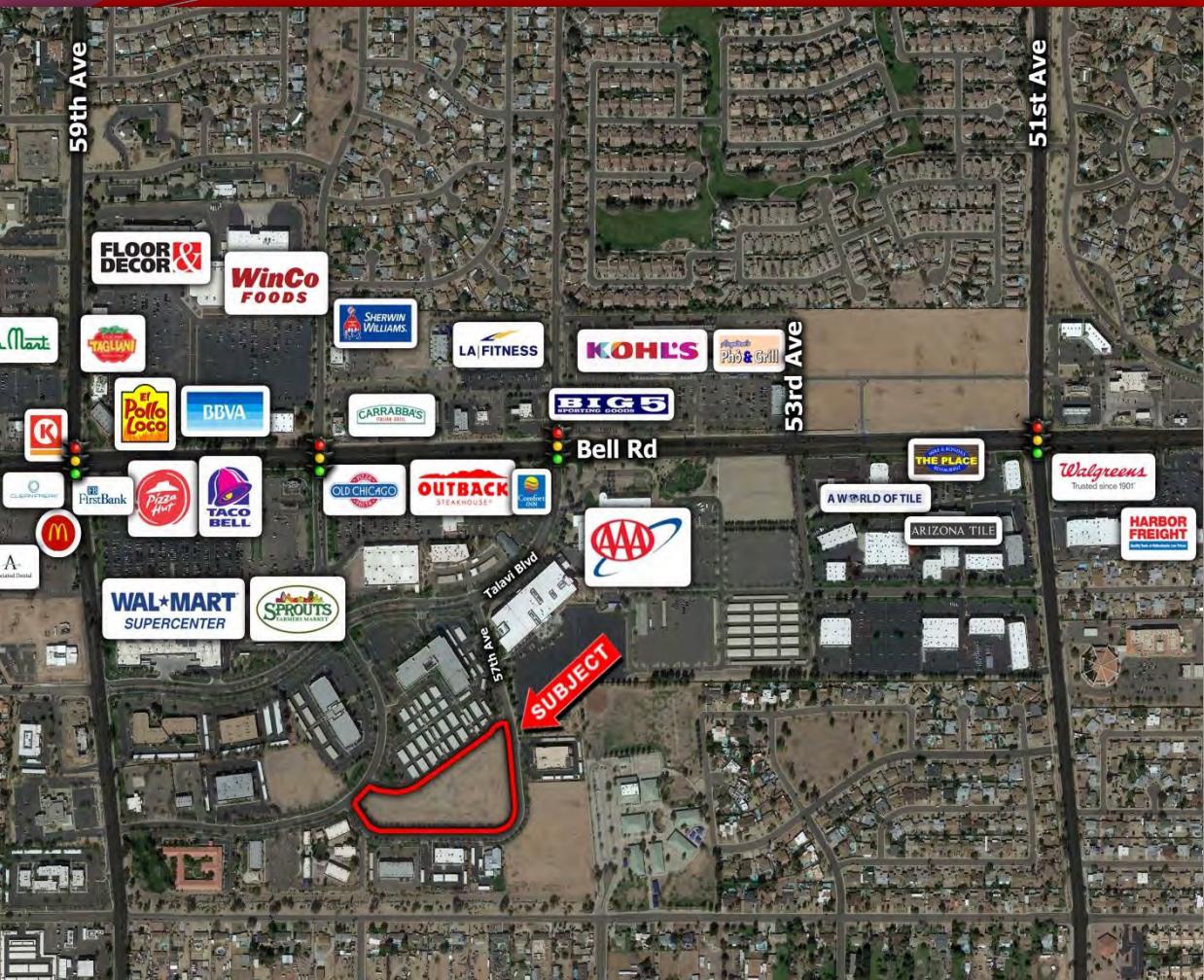
Type: Land  
Proposed Use: -  
Zoning: PAD  
Density: -

Developer: -  
Management: -  
True Owner: -  
Recorded Owner: -

Parcel Size: 268,765 SF  
Lot Dimensions: -  
Improvements: -  
On-Site Improv: -

Parcel Number: 200-50-181A, 200-50-182A, 200-50-183, 200-50-184, 200-50-185, 200-50-186, 200-50-187A

For Sale: For Sale at \$1,343,825 (\$5.00/SF) - Active



+/- 6.17 ACRES

GLENDALE, AZ

- Location:** NEC of 57<sup>th</sup> Ave & Beverly Ln in Glendale, AZ.
- Size:** +/- 6.17 Acres, (268,765 SF)
- Zoning:** PAD – Underlying business park uses
- Price:** \$5.00/per sq ft. All or part.
- Utilities:** All utilities to site
- Comments:** This is one of the last land parcels within the Talavi Business Park Master Plan. With multiple major medical facilities within a few mile radius and limited vacancy of medical office product, this site is prime for medical and other office related uses. Property is already platted and subdivided to 7 separate parcels. Owner will sell all or part.





Location: Vacant Land  
West Phoenix Cluster  
Glendale Submarket  
Maricopa County  
Glendale, AZ 85303

Type: Land  
Proposed Use: Retail  
Zoning: NSC, Glendale  
Density: -

Parcel Size: 358,934 SF  
Lot Dimensions: -  
Improvements: -  
On-Site Improv: Raw land

Developer: -  
Management: -  
True Owner: Rightstart Financial, Inc  
Recorded Owner: Rightstart Subsidiary, LLC

For Sale: For Sale - Active

# **±8.24 Acres at Hard Corner Intersection Anchors, Shops & Pads Available - New Construction**

SEC 83rd Ave & Glendale Ave | Glendale, AZ



**Available:** ±8.24 acres

**Rate:** Please call for rates

**Zoning:** NSC, City of Glendale

**Comments:** Conveniently located within two miles of Westgate, University of Phoenix Stadium, Gila River Arena, Cabela's and Tanger Outlet Westgate.

**Nearby Tenants:**

**TangerOutlets**

<b>Population Summary:</b>	<b>1 Mile</b>	<b>3 Miles</b>	<b>5 Miles</b>
2016 Total	15,119	130,555	382,775
2021 Total	16,481	140,002	407,065

<b>Average HH Income:</b>	<b>1 Mile</b>	<b>3 Miles</b>	<b>5 Miles</b>
2016	\$74,019	\$55,509	\$53,741

<b>Traffic Counts:</b>	N: ±11,100 VPD (NB & SB)	S: ±15,000 VPD (NB & SB)	E: ±22,400 VPD (EB & WB)	W: ±18,900 VPD (EB & WB)
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\*Glendale 2015



[www.phoenixcommercialadvisors.com/listings/info/83rdglen.htm](http://www.phoenixcommercialadvisors.com/listings/info/83rdglen.htm)

# **±8.24 Acres at Hard Corner Intersection Anchors, Shops & Pads Available - New Construction**

SEC 83rd Ave & Glendale Ave | Glendale, AZ

## **Site Plan**



site plan not drawn to scale

# SEC 83rd Ave & Glendale Ave | Glendale, AZ



# SEC 83rd Ave & Glendale Ave | Glendale, AZ



**C.2**

# **Marketing and Student Enrollment**

## C.2 Marketing and Student Enrollment

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- a) Provide viable and adequate timeframe for recruiting students consistent with the start-up date of the proposed school identified on the Target Population Page.**

The recruiting of students will begin in March 2020 through hosting informational nights to potential families and collecting information on interest forms. These informational meetings will be held monthly through March and April with increased frequency during the months of May and June. In addition to informational meetings with families, the school will use social media, direct mailers, and advertisements in local circulars to advertise the school's opening.

- b) Provide a clear and comprehensive plan that is viable and adequate to support the number of students included in the Three-Year Operational Budget.**

### **Marketing Plan**

SAWV's plan for student recruitment involves a wide array of media and materials to promote the school to ensure that the school reaches the widest possible audience. Promotional flyers and/or brochures will be distributed via direct mail as well as to community groups and churches to ensure that harder-to-reach families are aware of the school and their eligibility to apply for enrollment. Digital and social media marketing/advertising will be used in order to reach out to a broad audience through ads which direct parents to click on the school's website. Examples of social and digital marketing/ads include: Ads on Facebook, Digital ads on Pandora, Sponsored ads on Instagram, and Google Ads. Informational materials will be available in multiple languages, as needed. The school commits to using Social Media accounts as a means to promote the school and inform the community of the school's opening. The school will tailor its social media strategies to target specific audiences including local businesses and community organizations.

The School will distribute press releases and/or public service announcements to various media outlets to promote the open enrollment period, open house and other essential details about the school and its programs. A banner will also be posted on site with relevant information, including the school's website information, grade levels to be served, and phone number. Somerset will host informational meetings either on the school site or a nearby location which would be accessible to all interested in attending the school. These events would be promoted in the same manner as listed above. During the informational meetings, which will be held at various times during the day and evening in order to give parents options, the school will highlight its program and how it will serve all students.

Once opened, parents and community partners will be encouraged to inform family, friends, and their community groups about the School. Local elected officials and community leaders will be invited to visit the School. They will also be given an update on the program's growth and will be asked to share open enrollment information with their constituents through their newsletter and upcoming community meetings.

As a charter school, our marketing campaign, alongside the lack of zoning boundaries, allows for a more diverse student population. The School will make great efforts to reach families reflective of the demographic of the community it serves and of the traditional public schools in surrounding areas.

**c) Provide clear and specific sources for costs associated with the marketing plan.**

**Marketing Plan Costs and Timeframe**

Somerset Academy of the West Valley has secured an interest free loan of \$165,000.00 from Somerset Academy, Inc., to support the pre-operational expenses. SAWV plans to spend \$10,000 of these start-up funds for advertising/marketing as outlined in the chart below.

Timeline	Item	Cost
December 2019 – March 2020	Develop Somerset Academy of the West Valley website	\$ 1,500
December 2019– March 2020	Create Facebook page and other possible social media outlets	\$ 0
December 2019 – March 2020	Create and print flyers/brochures with information about the educational program	\$ 2,500
January-March 2020	Continue conversations with business and community leaders about the school and its purpose.	\$ 0
March-June 2020	Host informational nights for potential families and collect contact information	\$ 100
March-June 2020	Purchase banners to place at the school site upon approval	\$ 2,500
May-August 2020	Distribute press releases announcing approval of the school and to promote open enrollment period	\$ 700
May-August 2020	Create and distribute direct mail pieces that includes additional information about enrollment procedures	\$ 1,500
May-August 2020	Run social media ads	\$ 1,100
May-August 2020-	Host various informational nights for parents interested in learning more about the school program and enrollment procedures	\$ 100

Somerset Academy of West Valley will collaborate with Academica to create and implement a comprehensive and aggressive grassroots campaign which has yielded full enrollment in all of Somerset's 65+ campuses. Upon charter approval, Somerset Academy of West Valley will launch a digital marketing campaign. Immediately after a principal is hired, Academica will collaborate with the building leader to create a comprehensive marketing plan and track enrollment. This proven model has been successful across many different states and communities. The expectation that results for student and family demand for the Somerset education model will be no different in the state of Arizona. Please see below for marketing plan that will be implemented immediately upon hiring of principal.

Marketing Campaign Timeline	Assigned
<b>Discussion:</b> Discuss current marketing efforts, ideas, proposals, assignments, etc.	ALL
<b>Research:</b>	Principal

What makes Somerset different from public and charter schools? Why would I send my child to Somerset?	
<b>Research:</b> Somerset education model- What is being integrated in the classrooms? What sets you apart with this philosophy?	Principal Somerset, Inc.
<b>Research:</b> What is currently being offered in the community for school choice? What are families looking for? What is the state looking for? How does Somerset meet those unique needs?	Principal Somerset, Inc. Community Partners
<b>Research:</b> Search for low or no cost community events/opportunities  1) Fliers at community center 2) Facility contact / events etc. 3) Grocery store – table at front 4) School events (Carnivals, host neighborhood block parties) 5) List free or low cost community events that Somerset could attend.	Principal Somerset, Inc. Community Partners
<b>Resources:</b> High Resolution photos needed of students with school branding.	Principal Somerset, Inc.
<b>Clarification:</b> Somerset website states "The mission of Somerset Academy of Arizona K-8 is to maximize student achievement and foster the development of responsible, self-directed life-long learners in a safe and enriching learning environment, correlating with the vision to provide an equitable, high quality education for all students. Somerset Academy of Arizona is dedicated to providing a well-rounded, academic curriculum in a 'family-like' environment that is rigorous, creatively stimulating, and nurturing." Do you want your marketing to focus on this?	Principal Somerset, Inc.
<b>Preparation:</b>  Parent Meeting Dates Plan Parent Meeting Dates	Principal Somerset, Inc.
<b>Design:</b> <b>Graphics:</b>  Provide 4-5 Facebook Feed Ads (Enrollment)	Academica

<b>Graphics:</b> Provide 4-5 Facebook Feed Ads (Parent Interest Mtgs)	Academica
<b>Graphics:</b> Create one-pager infographics with information about Somerset Academy <b>[ROUGH DRAFT]</b>	Academica
<b>Graphics:</b> Create one-pager infographics with information about Somerset Academy <b>[FINAL DRAFT]</b>	Academica
<b>Graphics:</b> Create graphics for Somerset Academy homepage for users to access infographic/links and easier to access information about school.	Academica
<b>Flyer:</b> Create flyer for Parent meeting dates (Digital and print option)	Academica
<b>Distribution:</b> Distribute flyer with students and post within community businesses	Principal Community Partners
<b>Distribution:</b> Create 2-3 Facebook ads for parent meetings	Academica
<b>Social media:</b> Promote parent meeting dates via Facebook and/or Instagram	Academica
Evaluate/Compare and update enrollment numbers.	Academica
Determine if phase 2 (print) will need to be initiated.	ALL
Determine if additional marketing phases will need to be initiated.	ALL

- d) 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.**

SAWV believes the above marketing costs are adequate and viable to attract the projected number of students; based on the experience of Somerset Academy Inc. which has a high success rate of meeting/exceeding projected enrollment numbers when using the various marketing methods listed above. SOMAZ is confident Somerset Academy Inc.'s marketing strategies will be successful as both locations have demonstrated similar population demographics, as previously discussed in **Section A.2.** (*Please see Table 3 below as a reference*)

**Table 3**

	SAWV Target Pop.	Somerset Florida
<b>Am. Ind./AK Nat.</b>	<b>0%</b>	<b>17%</b>
<b>Asian</b>	<b>2%</b>	<b>4.7%</b>
<b>Black/ Af. Am.</b>	<b>7%</b>	<b>35.8%</b>
<b>Hisp./Lat.</b>	<b>70%</b>	<b>55.4%</b>
<b>White</b>	<b>17%</b>	<b>17%</b>
<b>Nat. HI/Pac. Isl.</b>	<b>0%</b>	<b>0%</b>
<b>Multi-Racial</b>	<b>2%</b>	<b>3.1%</b>
<b>ELL</b>	<b>16%</b>	<b>13%</b>
<b>FRL</b>	<b>81%</b>	<b>60%</b>
<b>SWD</b>	<b>11%</b>	<b>7%</b>

**e) 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.**

The marketing expenses listed in the marketing plan above are accounted for in the Start-up Budget and fully described in the Start-up Budget Assumptions. SAWV will only incur marketing expenses during its Start-up phase; in order to hit projected enrollment targets. No marketing expenses will be incurred during the schools' operation as the marketing tools purchased during Start-up will allow SAWV to reach planned enrollment.

**f) Describe the proposed fair and equitable admission requirements and documents required in the enrollment packet.**

**Admission Requirements**

In accordance with federal and state anti-discrimination laws, the School will not discriminate on the basis of race, ethnicity, national origin, gender, or disability against a student in its school admission process. An open admissions policy will be implemented wherein the School will be open to any student, as described in A.R.S. §15-184 who submits an application (prior to the posted deadline), unless the number of applications exceeds the capacity of the program, class, grade level, or building. In such case, all applicants shall have an equal chance of being admitted through a random selection/lottery process.

Enrollment applications will request the student's name, expected grade level, parent/guardian name, phone number, home address, and email address. Somerset Academy will not collect information pertaining to minority status, racial/ethnic background, gender, social-economic status, or special education identification. Submitted applications will be stamped with the date and time.

**g) Describe the enrollment procedures compliant with A.R.S. §15-184, including the timeframe, process used if capacity is insufficient to enroll all students, and documentation collected for school registration once a student is admitted to the school.**

### ***Enrollment Procedures***

Students will be recruited to fill out enrollment applications once the school receives its charter contract. Somerset Academy of Arizona will be accepting interest forms before the execution of the charter contract. Once the charter contract has been executed, open enrollment would officially begin and last two months after the execution of the contract. If the number of applications received exceeds the capacity of a grade level, the school will hold a random lottery for each grade level in order to ensure a fair and equitable enrollment process. In alignment with A.R.S. §15-184, the school will give enrollment preference to the following student populations prior to holding a lottery:

- ◆ Returning students
- ◆ Students who are siblings of a student enrolled in the charter school
- ◆ Children and grandchildren of employees of the school or charter holder
- ◆ Children and grandchildren of governing board members

Once all open spots are filled, the lottery will continue to establish an order of the remaining applications for a waiting list. Students who were selected within the lottery process will complete a full registration packet. Families of students on the waitlist will be contacted if a spot becomes available and will be required to complete a registration packet in order to be officially enrolled. If the number of applications falls short of the established capacity, all students will be contacted and offered enrollment. Supplemental registration periods may be held for the purpose of reaching student capacity. Once the target is attained in each grade level, a wait list will be formed based on the order that applications are received.

Families who accept the enrollment will be required to submit the following information:

- ◆ Per A.R.S. §15-828, one of the following (a photocopy is taken for school records and the original is returned to the parent or guardian):
  - A certified copy of the pupil's birth certificate.
  - Other reliable proof of the pupil's identity and age, including the pupil's baptismal certificate, an application for a social security number or original school registration records and an affidavit explaining the inability to provide a copy of the birth certificate.
  - A letter from the authorized representative of an agency having custody of the pupil pursuant to title 8, chapter 2 certifying that the pupil has been placed in the custody of the agency as prescribed by law.
- ◆ Immunization records
- ◆ Request for release of student records
- ◆ Copy of current IEP (if applicable)
- ◆ Home language survey
- ◆ Copy of custody papers (if applicable)
- ◆ McKinney-Vento eligibility questionnaire and regulations
- ◆ Free and Reduced School Meals family application
- ◆ Consent for medical/dental emergency treatment and medical information form
- ◆ Physical activity consent form

- ◆ Consent for off-campus activities
- ◆ Internet use policy
- ◆ Media release form
- ◆ Signature recognizing school's rules, procedures and expected behaviors

***h) 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.***

***Enrollment Targets***

The below figures (C.2.1, C.2.2, C.2.3) represent Somerset Academy of the West Valley's minimum, planned, and maximum enrollment targets for the first three years of its inception. Somerset Academy of the West Valley's minimum enrollment targets are based off of 95% of the school's planned enrollment; similarly, Somerset Academy of the West Valley's maximum enrollment targets are based off of 105% of the school's planned enrollment.

**Figure C.2.1**  
**Minimum Enrollment Targets (Year 1 – 3) – 95% of Planned Enrollment**

Minimum Enrollment - West Valley	Year 1	Year 2	Year 3
<b>Grades Served(Teacher-Student Ratio)</b>	K - 5 (K-3)	K - 5 (K-4)	K - 5
K (1:22)	104	104	125
1 (1:22)	63	104	104
2 (1:22)	42	63	104
3 (1:22)	42	42	63
4 (1:22)		42	42
5 (1:22)			42
6 (1:25)			
7 (1:25)			
8 (1:25)			
9 (1:25)			
10 (1:25)			
11 (1:25)			
12 (1:25)			
<b>Total</b>	<b>251</b>	<b>355</b>	<b>480</b>
<b>% of planned enrollment:</b>	95%	95%	95%

**Figure C.2.2**  
**Planned Enrollment Targets (Year 1 – 3) – 100% of Planned Enrollment**

Planned Enrollment - West Valley	Year 1	Year 2	Year 3
----------------------------------	--------	--------	--------

<b>Grades Served(Teacher-Student Ratio)</b>	K - 5 (K-3)	K - 5 (K-4)	K - 5
K (1:22)	110	110	132
1 (1:22)	66	110	110
2 (1:22)	44	66	110
3 (1:22)	44	44	66
4 (1:22)		44	44
5 (1:22)			44
6 (1:25)			
7 (1:25)			
8 (1:25)			
9 (1:25)			
10 (1:25)			
11 (1:25)			
12 (1:25)			
<b>Total</b>	<b>264</b>	<b>374</b>	<b>506</b>
<b>% of planned enrollment:</b>	100%	100%	100%

**Figure C.2.3**  
**Maximum Enrollment Targets (Year 1 – 3) – 105% of Planned Enrollment**

<b>Grades Served(Teacher-Student Ratio)</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
	K - 5 (K-3)	K - 5 (K-4)	K - 5
K (1:22)	116	116	139
1 (1:22)	69	116	116
2 (1:22)	46	69	116
3 (1:22)	46	46	69
4 (1:22)		46	46
6 (1:25)			46
7 (1:25)			
8 (1:25)			
9 (1:25)			
10 (1:25)			
11 (1:25)			
12 (1:25)			
5 (1:22)			
<b>Total</b>	<b>277</b>	<b>393</b>	<b>532</b>
<b>% of planned enrollment:</b>	105%	105%	105%

*i) Ensure all processes and procedures, and documentation used in the enrollment process are compliant with all applicable state and federal statutes, rules, and policies.*

All processes, procedures and documentation used in the enrollment process at Somerset Academy of the West Valley will be compliant and adhere to all applicable state and federal statutes, rules, and policies.

# **C.3**

# **Personnel**

## C.3 Personnel

---

*A response that meets the Board's standard will fully address each of the following:*

- a) *Provide a clear and comprehensive staffing plan, including the minimum professional qualifications and/or experience for each position. (2 points)*

Somerset West Valley will begin in Year One with a total staff of 18. This includes 15 teachers and 3 admin and support staff; with a starting enrollment of 264 students. By Year Three, Somerset West Valley will expand to a total staff of 33. This includes 27 teachers and 6 admin and support staff; with a projected enrollment of 506 students. As shown in Figure C.3.1 below, Somerset West Valley intends to recruit, hire, train and compensate the following necessary personnel in order to implement its program of instruction and carry out the mission of Somerset:

**Figure C.3.1  
Staffing Plan (Year 1 – 3)**

<b>Somerset Academy West Valley</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<i>Principal</i>	1	1	1
<i>Assistant Principal</i>	0	0	0
<i>Teacher-Regular Education</i>	14	19	25
<i>Teacher-Special Education</i>	1	1.5	2
<i>Instructional Assistants-Regular Education</i>	0	0	2
<i>Receptionist</i>	0	1	1
<i>Office Manager</i>	1	1	1
<i>Custodial/Maintenance</i>	1	1	1
<b>Total FTE's:</b>	<b>18</b>	<b>24.5</b>	<b>33</b>

As shown in Figure C.3.2 below, Somerset West Valley will have the following Academica personnel as back office support:

**Figure C.3.2  
EMO Back Office Support (Year 1 – 3)**

<b>Management Organization Positions</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
<i>Chief Operating Officer (COO)</i>	1	1	1
<i>Chief Financial Officer (CFO)</i>	1	1	1
<i>Chief Legal Officer (CLO)</i>	1	1	1
<i>Bookkeeper</i>	1	1	1
<i>Paralegal, Director of Growth &amp; Management</i>	2	2	2
<i>Procurement Director, Facility Manager</i>	2	2	2
<i>HR, Event Coordinator, Other</i>	1	1	1
<b>Total Back Office FTE's:</b>	<b>9</b>	<b>9</b>	<b>9</b>

Below are general qualifications for all staff and faculty positions. Please see Section B.1 Applicant Entity to see detailed and specific qualifications in addition to, whom each position reports to, whom each position supervises, and their essential performance responsibilities.

- **Principal**
  - **Qualifications**
    - Strong commitment to, belief in, and alignment with the school's mission and vision
    - Experience in leadership and management of adults and children
    - Graduate degree in education, management, or STEM field preferred
    - Arizona Principal Certificate
    - Arizona fingerprint clearance card
- **Assistant Principal**
  - **Qualifications**
    - Strong commitment to, belief in, and alignment with the school's mission and vision
    - Experience in leadership and management of adults and children
    - Master's degree in education, management, or STEM field
    - Arizona teaching certificate or teaching intern certificate
    - Arizona fingerprint clearance card
- **Teacher-Regular Education**
  - **Qualifications**
    - Strong commitment to, belief in, and alignment with the school's mission and vision.
    - Bachelor's degree in education, management, or STEM field preferred
    - Arizona teaching certificate or teaching intern certificate
    - Arizona fingerprint clearance card
- **Teacher-Special Education**
  - **Qualifications**
    - Strong commitment to, belief in, and alignment with the school's mission and vision.
    - Bachelor's degree in Education preferred
    - Arizona Special Education certificate
    - Arizona fingerprint clearance card
- **Instructional Assistants-Regular Education**
  - **Qualifications**
    - Strong commitment to, belief in, and alignment with the school's mission and vision
    - Willing to learn and use the school's SIS software
    - High school diploma or equivalent
    - Proficient in Microsoft Office
    - Arizona fingerprint clearance card
- **Receptionist**
  - **Qualifications**
    - Strong commitment to, belief in, and alignment with the school's mission and vision
    - Willing to learn and use the school's SIS software
    - High school diploma or equivalent
    - Proficient in Microsoft Office
    - Arizona fingerprint clearance card
- **Office Manager/Registrar**

- ***Qualifications***
  - Strong commitment to, belief in, and alignment with the school's mission and vision
  - Strong organizational skills
  - Strong intrapersonal and interpersonal communication skills
  - Strong problem-solving skills
  - Proficient in Microsoft Office
  - Accounts payable/receivable experience

- **Custodial/Maintenance**

- ***Qualifications***
  - Strong commitment to, belief in, and alignment with the school's mission and vision
  - Strong organizational skills
  - Strong intrapersonal and interpersonal communication skills
  - Strong mechanical skills

b) *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:*

- *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)*

The staffing plan allows for the effective implementation of the program of instruction and overall mission of Somerset West Valley by ensuring that each classroom has a highly effective teacher and that the day-to-day administration of the school is being fulfilled by qualified professionals with the skills and experience necessary to complete the administrative tasks of the school. Figure C.3.3 shows the projected enrollment, staffing plan, and teacher-student ratios of Somerset West Valley:

**Figure C.3.3**  
**Projected Enrollment & Staff (Year 1 – 3)**

<b>Grades Served(Teacher-Student Ratio)</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
K (1:22)	110	110	132
1 (1:22)	66	110	110
2 (1:22)	44	66	110
3 (1:22)	44	44	66
4 (1:22)		44	44
5 (1:22)			44
6 (1:25)			
7 (1:25)			
8 (1:25)			
9 (1:25)			
10 (1:25)			
11 (1:25)			

<b>12 (1:25)</b>			
<b>Total Students:</b>	<b>264</b>	<b>374</b>	<b>506</b>
<i>Instructional Staff - General Education</i>	12	17	23
<i>Instructional Staff - Music &amp; Physical Education</i>	2	2	2
<i>Instructional Staff - Special Education</i>	1	1.5	2
<b>Total Instructional Staff:</b>	<b>15</b>	<b>20.5</b>	<b>27</b>
<i>Non-Instructional Staff</i>	3	4	6
<b>Total Staff:</b>	<b>18</b>	<b>24.5</b>	<b>33</b>

- c) *Describe a compensation and benefits plan that supports personnel qualifications and experience required to support the program of instruction. (1 point)*

Somerset West Valley will offer competitive salary and benefits to administrative/teaching staff in order to attract experienced, highly effective professionals to the school. All salaries and employee related expenses are accounted for in the Start-Up and Three-Year Operational Budgets and fully described in the Budget Assumptions. The compensation for employees of Somerset West Valley is competitive and corresponds to the expertise and credentials that each position entails. This is a crucial hiring asset to attract high quality staff.

Somerset West Valley will look to participate in a qualified 403(b) plan that includes an anticipated employer contribution portion of 6%. Somerset West Valley will also pay all other required employer contributions including Social Security, Medicare, Unemployment, and Worker's Compensation, which are assumed to be 9% of each employee's total salary. Somerset West Valley will also offer a competitive health benefits package. Full time employees will be eligible, and the cost is assumed at a contribution rate of 18% of employee salaries.

Somerset West Valley has the autonomy to reflect the benefit package that would best accommodate the needs of the school and staff. It reserves the right to use the same package as Somerset West Valley and their network of schools in Florida provided through ADP TotalSource in alignment with Arizona Statutes. Full time, salaried employees will be entitled to Health Insurance and other benefits through this plan. ADP Totalsource, a professional employer organization that provides human resource services to small and moderate size employers. The use of a professional employer organization allows the staff of the School to enjoy the same level of benefits that are available to employees of large organization such as Fortune 500 companies (including health/dental/vision insurance and Retirement/401k plans). More information on ADP is found on [www.adptotalsource.com](http://www.adptotalsource.com).

The compensation and benefits structure mentioned above offers teachers and staff with an attractive program which the school believes contributes to their high teacher/staff retention rate.

- d) *Provide a detailed plan to recruit, hire, and train instructional staff consistent with the start-up of the school. (2 points)*

**Recruitment** – The School will ensure that faculty members are certified, highly qualified professional personnel. Accordingly, the School will: Recruit teachers through various local and

national job fairs and teacher fairs, through online recruitment sites, and organize other efforts to attract in-field experts to serve as teachers in the various disciplines that require higher levels of academic content delivery. Recruitment efforts will also include advertisements in local newspapers and on the school's website, presentations and fliers at local universities and via word of mouth.

**Selection Process-** The school will look for candidates who demonstrate the following qualifications: Educational background: Bachelor's Degree or higher in field; State Certification for the required position; Excellent presentation and interpersonal skills; Satisfactory recommendation and/or evaluations from previous employer; Personal characteristics, knowledge, and belief in the school's mission; An ability and motivation to work as part of a team in a small-school setting with parental involvement, and; References/Letters of Recommendation. The Principal, once hired, may appoint a committee to screen highly-qualified and certified teachers. This committee would develop an interview questionnaire for specific positions, conduct initial screening interviews and make recommendations to the principal.

**Hiring Process** - The principal will review recommendations, conduct final interviews, and make all final hiring decisions within the scope of the budget as approved by the Governing Board. The school will provide equal employment opportunities for all candidates.

**Training** - Prior to school opening, there are two phases of teacher preparation, one addressing the unique needs to new teachers, and the other addressing returning teachers.

- **New Teacher Induction Program** (all teachers will participate prior to the first school year): provides new educators with tools for entering the field such as:
  - Classroom management techniques, strategies for effective communication with parents and how to access student data and gradebooks.
  - These teachers will also be provided with a Somerset orientation to help acquiesce them to the policies and procedures of their specific campus. These teachers meet one week prior to returning faculty.
- **Pre-Service Week:** The week prior to opening of schools, in accordance with the district calendar, the School will have a gamut of professional learning opportunities for the faculty and staff to prepare for the upcoming school year, which will include, but not limited to the following topics/presentations:
  - Data-Driven Decision-Making – Administrators and staff collaborate to analyze, extrapolate and disaggregate school data from a variety of sources and to use this data to create effective school improvement plans and increase student achievement.
  - Student Support – The faculty and staff related to student support provide guidance and procedures on the following topics:
    - Exceptional Student Education – Teachers are guided through the IEPs of their students and are made aware of the accommodations required to address the needs of each learner.
    - ESOL – Teachers are provided with guidance and resources to help address the unique academic and social needs of English Language Learners.
    - RtI/MTSS Framework – Staff learn to initiate and address the RtI model to meet the academic and behavioral needs of all students.
  - Curriculum Implementation by Subject/Specialty – Teachers will participate in individual department trainings related to curriculum implementation, Arizona Standards and AzMERIT implementation, with special emphasis on incorporating digital resources.

- Other:
  - School Literacy Plan – Teachers will be exposed to the School's literacy plan with specific strategies on how to differentiate and individualize instruction.
  - Technology Trainings: Beginner/Intermediate. Teachers are exposed to the resources and instructional implications of utilizing technology that will be used school wide as well as technology within the classrooms.
  - Safety and Security – Training will instruct staff on daily safety procedures, and how to prevent and protect the school and students, to handle emergency situations, and to recognize potential threats in accordance with the school safety plan.
  - School Discipline Plan – Classroom-based discipline plans are discussed and approved; school-wide discipline procedures are outlined and clarified.

e) *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)*

The governing board is confident that the recruiting process will result in 14 teachers and 1 SPED teacher that will be qualified to implement the program of instruction in year one by:

- recruiting candidates who hold the minimum qualifications,
- ensuring participation of several stakeholders with various perspectives,
- focusing on demonstrable effectiveness in teaching AND mission alignment,
- verifying experience, education, training, and background, and
- providing competitive salaries and a positive school culture.

Projected Year 1 salaries for teachers is \$39,500.00 for each teacher and \$41,500 for the SPED teacher, which is comparable to the local school district.

f) *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)*

Salaries are consistent with the Start-Up and Three-Year Operational Budgets and the Budget Assumptions.

**C.4**

# **Start Up Budget**

## C.4 Start-Up Budget - *Assumptions*

### *Revenue*

#### **Secured Funds – Loans:**

Somerset Academy West Valley has secured an interest free loan of \$165,000.00 from Somerset Academy, Inc. to support the pre-operational expenses. Start-up funds will be used for stipends, advertising/marketing, student/teacher recruitment, fees, and other misc. start-up expenses.

### *Administration, Instruction, & Support (AIS) EXPENDITURES*

#### **Salaries:**

##### **Approx. 39.66% of the budget (Start-Up)**

- **Principal**
  - *Start-Up: Assumes 1 School Principal position for the months of June & July 2019 in the amount of 13,333.00. Assumes an 9% required employer contribution.*
- **Teacher-Regular Education**
  - *Start-up: Assumes an in-service stipend of \$1,200.00 per teacher for 17 teachers (based on 40 hours @ \$30/hour) for the months of June & July 2019; assumes an 9% required employer contribution. These teachers will be assisting in the preparation of the curriculum.*
- **Teacher-Special Education**
  - *Start-up: Assumes a part-time in-service stipend of \$1,200.00 for 1 special education teacher (based on 40 hours @ \$30/hour) for the months of June & July 2019; assumes an 9% required employer contribution. This special education teacher will be assisting in the preparation of the curriculum.*
- **Office Manager/Registrar**
  - *Start-up: Assumes 1 part-time Office Manager/Registrar position for the months of June & July 2019 in the amount of 6,416.67. Assumes an 9% required employer contribution.*

#### **Employee Benefits:**

##### **Approx. 1.14% of the budget (Start-Up)**

Assumes Somerset Academy West Valley will utilize a qualified 403(b) plan that includes an anticipated employer contribution portion of 6%. All full-time employees will be eligible to receive this benefit.

#### **Employee Insurance:**

##### **Approx. 3.43% of the budget (Start-Up)**

Somerset Academy West Valley will assume employer contribution towards each FTE's insurance premium is estimated at a rate of 18% of employee salaries. Employee insurance will cover all employees except for substitute teachers and other contracted services; as they are not employed by the school.

#### **Office Supplies (Paper, Postage, etc.):**

##### **Approx. 2.41% of the budget (Start-Up)**

Assumes a start-up total of \$2,500.00 for office supplies such as copy paper, envelopes, pens, labels, folders, notebooks, etc.; utilized for school start-up preparation.

### **Membership Dues, Registrations, & Travel:**

#### **Approx. 13.58% of the budget (Start-Up)**

Assumes Somerset Academy West Valley will engage with the Arizona Charter Schools Association at a \$4.50 per student annual membership rate. Additionally, Somerset Academy West Valley would like to send the school principal and one other to be determined staff member to Somerset Academy's affiliate schools in Miami, Florida as well as their affiliate schools in Las Vegas, Nevada. Below are the travel costs associated with travel to each of the affiliate school locations:

Assumptions (GSA.gov):	Travel to Somerset Affiliate Schools in Florida (Miami, FL) Date - TBD				Assumptions (GSA.gov):	Travel to Somerset Affiliate Schools in Nevada (Las Vegas, NV) Date - TBD			
	Travel Expense	Travel Costs	Days/Nights	Total Costs		Travel Expense	Travel Costs	Days/Nights	Total Costs
	Airfare:	\$ 754.00		\$ 754.00		Airfare:	\$ 386.00		\$ 386.00
	Transportation:	\$ 50.00	7 days	\$ 350.00		Transportation:	\$ 50.00	7 days	\$ 350.00
	Per Diem:	\$ 66.00	7 days	\$ 462.00		Per Diem:	\$ 61.00	7 days	\$ 427.00
	Hotel:	\$ 150.17	6 nights	\$ 901.00		Hotel:	\$ 111.00	6 nights	\$ 666.00
<i>Total:</i> \$ 2,467.00				<i>Total:</i> \$ 1,829.00					
<i>Rounding estimation per person:</i> \$ 2,500.00				<i>Rounding estimation per person:</i> \$ 1,850.00					
<i>Total for two people:</i> \$ 5,000.00				<i>Total for two people:</i> \$ 3,700.00					

Lastly, Somerset Academy West Valley would like to send the school principal and one other to be determined staff member to the 2020 National Charter School Conference which will be assumed to be held in Las Vegas, Nevada. Below are the travel costs associated with the travel to the 2020 National Charter School Conference:

Assumptions (GSA.gov):	2020 National Charter School Conference (TBD) Date - TBD				Assumptions (GSA.gov):
	Travel Expense		Travel Costs	Days/Nights	
	Registration:	\$ 790.00			
	Airfare:	\$ 386.00			
	Per Diem:	\$ 61.00	5 days	\$ 305.00	
	Hotel:	\$ 111.00	4 nights	\$ 444.00	
<i>Total:</i> \$ 1,925.00					
<i>Rounding estimation per person:</i> \$ 1,950.00					
<i>Total for two people:</i> \$ 3,900.00					

Membership Dues, Registrations, & Travel - Summary	
Expense	Total Cost
Arizona Charter Schools Association Membership	\$ 1,188.00
Travel to Somerset Affiliate Schools in Florida (Miami, FL)	\$ 5,000.00
Travel to Somerset Affiliate Schools in Nevada (Las Vegas, NV)	\$ 3,700.00
National Charter School Conference 2020 (Las Vegas, NV)	\$ 3,900.00
<b>Total:</b>	<b>\$ 13,788.00</b>

**SIS Software:*****Approx. 16.39% of the budget (Start-Up)***

Assumes Somerset Academy West Valley will utilize Infinite Campus, an education software utilized by both the faculty of the school and parents/guardians of the students, projected start-up cost of \$17,000 for the initial setup and implementation of Infinite Campus.

***Operations & Maintenance (O&M) EXPENDITURES*****Marketing/Advertising:*****Approx. 9.64% of the budget (Start-Up)***

Somerset Academy West Valley will market via multiple modes to ensure that all families are informed of their educational options. The marketing campaign includes: school website, social media such as Facebook, flyers, direct mailers, advertisements in varying English and Spanish media, building relationships with community groups, and a door-to-door approach. Somerset Academy West Valley will post flyers in local public facilities such as the post office, community centers, and other locations of public access. The goal is to reach parents and legal guardians by using various means of information delivery. Promotional flyers and/or postcards will be distributed via direct mail and/or through community groups and churches to ensure that families are aware of the school and their eligibility to apply for enrollment.

**Marketing budget for Start-Up:**

Timeline	Item	Cost
December 2019 – March 2020	Develop Somerset Academy West Valley AZ website	\$ 1,500
December 2019 – March 2020	Create Facebook page and other possible social media outlets	\$ 0
December 2019 – March 2020	Create and print flyers/brochures with information about the educational program	\$ 2,500
January-March 2020	Continue conversations with business and community leaders about the school and its purpose.	\$ 0
March-June 2020	Host informational nights for potential families and collect contact information	\$ 100
March-June 2020	Purchase banners to place at the school site upon approval	\$ 2,500
May-August 2020	Distribute press releases announcing approval of the school and to promote open enrollment period	\$ 700
May-August 2020	Create and distribute direct mail pieces that includes additional information about enrollment procedures	\$ 1,500
May-August 2020	Run social media ads	\$ 1,100
May-August 2020	Host various informational nights for parents interested in learning more about the school program and enrollment procedures	\$ 100

Somerset Academy West Valley believes the above marketing costs are adequate and viable to attract the projected number of students; based on the experience of Somerset Academy Inc. which has a high success rate of meeting/exceeding projected enrollment numbers when using the various marketing methods listed above. Somerset Academy West Valley is confident Somerset Academy Inc.'s marketing strategies will be successful as both locations have demonstrated similar

population demographics, as previously discussed in **Section A.2.** (*Please see Table 3 below as a reference*)

**Table 3**

	Somerset West Valley Target Pop.	Somerset Florida
<b>Am. Ind./AK Nat.</b>	<b>0%</b>	<b>17%</b>
<b>Asian</b>	<b>2%</b>	<b>4.7%</b>
<b>Black/ Af. Am.</b>	<b>7%</b>	<b>35.8%</b>
<b>Hisp./Lat.</b>	<b>70%</b>	<b>55.4%</b>
<b>White</b>	<b>17%</b>	<b>17%</b>
<b>Nat. HI/Pac. Isl.</b>	<b>0%</b>	<b>0%</b>
<b>Multi-Racial</b>	<b>2%</b>	<b>3.1%</b>
<b>ELL</b>	<b>16%</b>	<b>13%</b>
<b>FRL</b>	<b>81%</b>	<b>60%</b>
<b>SWD</b>	<b>11%</b>	<b>7%</b>

**Building Improvements:**

**Approx. 2.41% of the budget (Start-Up)**

Somerset Academy West Valley will enter into contracts for a/c repair, pest control, among other building maintenance contracts based upon the needs of the school. Somerset Academy West Valley will receive multiple bids before making their selection, and will reach out to vendors listed in the Charter Marketplace to request bids. Pricing is dependent upon the finalization of a facility lease, as certain maintenance aspects may not be needed. Assumes a total start-up cost for building improvements of \$2,500.00. Assumes minimal building improvements necessary in Start-Up.

**Land & Improvements:**

**Approx. 0.96% of the budget (Start-Up)**

Somerset Academy West Valley will enter into contracts for lawn care, among other land & improvements contracts based upon the needs of the school. Somerset Academy West Valley will receive multiple bids before making their selection, and will reach out to vendors listed in the Charter Marketplace to request bids. Pricing is dependent upon the finalization of a facility lease, as certain maintenance aspects may not be needed. Assumes a total start-up cost for land improvements of \$1,000.00. Assumes minimal land improvements necessary in Start-Up.

**Fees/Permits:**

**Approx. 6.70% of the budget (Start-Up)**

Assumes a total start-up cost for fees/permits of \$6,955.00. Amount incurred for the new charter application fee of \$6,500.00, as well as the \$65.00 per background check for 7 board members.

**Property/Casualty Insurance:**

**Approx. 0.72% of the budget (Start-Up)**

Assumes \$750 a month for property/casualty insurance based upon conservative figures provided by The Mahoney Group and figures provided by other charter schools working with Academica of similar size. Only one month will be covered under the Start-up Budget.

**Liability Insurance:**

***Approx. 0.72% of the budget (Start-Up)***

Assumes \$750 a month for liability insurance based upon conservative figures provided by The Mahoney Group and figures provided by other charter schools working with Academica of similar size. Only one month will be covered under the Start-up Budget.

**Phone/Communications/Internet Connectivity:**

***Approx. 1.20% of the budget (Start-Up)***

Somerset Academy West Valley will likely purchase phone & internet services through Cox Communication. Assumes \$1,000 a month the first year based on rates given by Cox Communications, who has and is currently serving charter schools similar in size of the proposed charter. Includes the anticipatory yearly expansion of the school. Only one month will be covered under the Start-up Budget.

**Student Furniture/Office Furniture/Student Technology/Office Technology Equipment:**

***Approx. 0.00% of the budget (Start-Up)***

FFE Lease: Instructional Equipment / Computers / Furniture / Fixtures - Utilizing Academica's standing relationship with the lending institution Vectra Bank will allow Somerset Academy West Valley to lease all their furniture, fixtures, and equipment in the first year of the school over a 48-month period. The lease will include a 5% residual purchase option at the end of 48 months or an early purchase option in the 45<sup>th</sup> month for a 6% residual. The proposed campus will likely enter into this lease agreement in their first year of operation. Somerset Academy West Valley budgets \$1,000 per student to outfit the entire school in its first year at a 5% interest rate over 4 years.

The equipment to outfit the school will be delivered and installed before the commencement of the first day of school; and lease payments will begin on the 1<sup>st</sup> of November. Therefore, no money is budgeted for equipment on the Start-up Budget.

**Other Leases (Security, Copiers, etc.):**

***Approx. 1.04% of the budget (Start-Up)***

Copier/Printing – Anticipated copier lease at a rate of \$1,000 per month. Including a cushion to account for overages in printing, which will also incrementally increase as student enrollment increases. Figures based upon figures provided by other charter schools of similar size currently working with Academica. Only one month will be covered under the Start-up Budget. Somerset Academy West Valley believes the equipment costs listed in the Three Year Operational Budget Assumptions are adequate and viable to account for the anticipated student enrollment each year.

C.4 Start-Up Budget

	A	B	C	D	E	F
1						
2	<b>Applicant Name:</b> <u>Somerset Academy West Valley</u>					
3						
4	Provide Assumptions by Line	August 1 of Opening Year				Timeframe for Acquisition
5	<b>START-UP REVENUE</b>				<b>Total \$</b>	
6	Secured Funds - Private Donations					
7	Secured Funds - Loans			\$ 165,000.00	1/1/2020	
8	Secured Funds - Other					
9	Total Start-up Revenue			\$ 165,000.00		
10						Timeframe for Acquisition
11	<b>Administration, Instruction, &amp; Support (AIS) EXPENDITURES</b> (add lines as necessary)	# of FTE Staff	@ Salary	Required Employer Contributions per FTE	<b>Total \$</b>	
12	Salaries					
13	Director/Principal	1.00	\$ 13,333.33	\$ 1,200.00	\$ 14,533.33	6/1/2020
14	Teacher-Regular Education	14.00	\$ 1,200.00	\$ 108.00	\$ 18,312.00	6/1/2020
15	Teacher-Special Education	1.00	\$ 1,200.00	\$ 108.00	\$ 1,308.00	6/1/2020
16	Clerical				\$ -	
17	Bookkeeper/Finance	1.00	\$ 6,416.67	\$ 577.50	\$ 6,994.17	6/1/2020
18	Custodial/Maintenance				\$ -	
19	Other				\$ -	
20	Employee Benefits				\$ 1,185.00	6/1/2020
21	Employee Insurance (if providing)				\$ 3,555.00	6/1/2020
22	Office Supplies (Paper, Postage, etc.)				\$ 2,500.00	6/1/2020
23	Instructional Consumables					
24	Membership Dues, Registrations, & Travel				\$ 13,788.00	7/1/2020
25	Contracted Services: AIS					
26	Contracted Services: Special Education					
27	Curriculum & Resource Materials					
28	Library Resources/Software					
29	SIS Software				\$ 17,000.00	7/1/2020
30	Other					

Approved DATE

C.4 Start-Up Budget

	A	B	C	D	E	F
31	<b>Total Administration, Instruction, &amp; Support</b>				\$ 79,175.50	
32						Timeframe for Acquisition
33	<b>Operations &amp; Maintenance (O&amp;M)</b>				<b>Total \$</b>	
34	<b>EXPENDITURES</b> (add lines as necessary)					
35	Supplies					
36	Marketing/Advertising				\$ 10,000.00	1/1/2020
37	Contracted Services: O&M					
38	Building Rent/Lease/Loan					
39	Building & Improvements				\$ 2,500.00	7/1/2020
40	Land & Improvements				\$ 1,000.00	7/1/2020
41	Fees/Permits				\$ 6,955.00	1/1/2020
42	Property/Casualty Insurance				\$ 750.00	7/1/2020
43	Liability Insurance				\$ 750.00	7/1/2020
44	Utilities (Electric, Gas, Water, Waste)					
45	Phone/Communications/Internet Connectivity				\$ 1,250.00	7/1/2020
46	Student Furniture & Equipment					
47	Office Furniture & Equipment					
48	Student Technology Equipment					
49	Office Technology Equipment					
50	Other Leases (Security, Copiers, etc.)				\$ 1,075.00	7/1/2020
51	Loan Repayment					
52	Other					
53	<b>Total Operations &amp; Maintenance</b>				\$ 24,280.00	
54	<b>Total Expenditures</b>				\$ 103,455.50	
55	<b>Total Start-up Revenues</b>				\$ 165,000.00	
56						
57	<b>Budget Balance (= Revenues - Expenditures)</b>				\$ 61,544.50	

Approved DATE

**C.5**

# **Three Year Operational Budget**

## C.5 Three Year Operational Budget – Assumptions

### Revenue

#### State Funding (Equalization Assistance):

The budget created for Somerset Academy West Valley includes a revenue assumption calculated using Arizona State Board of Charter Schools' revenue calculator. Special education student add-ons were not included to provide for a conservative budget that would not rely on such add-ons. Below are the revenue assumption calculations (*based upon 95% of planned enrollment to provide a conservative revenue projection*):

Projected Revenue Calculator			
A. Enter Estimated Student Counts	Year 1	Year 2	Year 3
Kinder	104	104	125
Grades 1-3	147	209	271
Grades 4-8		42	84
Grades 9-12			
Total	251	355	480
B. Will you have a 200 Day Calendar?	No	No	No
 C. Enter Estimated Student Count Add-On Numbers*			
Hearing Impairment			
ELL (English Learners)			
MD-R, A-R, and SID-R			
MD-SC, A-SC, and SID-SC			
Multiple Disabilities Severe Sensory Impairment			
Orthopedic Impairment (Resource)			
Orthopedic Impairment (Self-Contained)			
DD, ED, MIID, SLD, SLI, and OHI			
Emotionally Disabled (Private)			
Moderate Intellectual Disability			
Visual Impairment			
D. Estimated Equalization Revenue	\$ 1,502,072	\$ 2,229,414	\$ 3,005,323

### Administration, Instruction, & Support (AIS) EXPENDITURES

#### Salaries:

#### Approx. 49.81% of the budget (Year 1 – Year 3)

Somerset Academy West Valley will begin in Year 1 with a total staff of 18. This includes 15 teachers and 3 admin & support staff; with a starting enrollment of 264 students. By Year 3, Somerset Academy West Valley will expand to a total staff of 33. This includes 27 teachers and 6 admin & support staff; with a projected enrollment of 506 students. Below are the anticipated staffing positions including the salary assumptions of each position:

- **Principal**
  - *Year 1: Assumes 1 full-time School Principal position. Projected Year 1 salary of \$80,000.00 with a 9% required employer contribution.*

- **Year 2:** Salary assumes an annual growth rate of 3%. Projected Year 2 salary of \$82,400.00 with a 9% required employer contribution.
  - **Year 3:** Salary assumes an annual growth rate of 3%. Projected Year 3 salary of \$84,872.00 with a 9% required employer contribution.
- **Teacher-Regular Education**
  - **Year 1:** Assumes 14 full-time teacher positions. Projected Year 1 salary of \$39,500.00 for each teacher, with a 9% required employer contribution
  - **Year 2:** Assumes 19 full-time teacher positions. Salary assumes an annual growth rate of 3%. Projected Year 2 salary of \$40,685.00 for each teacher, with a 9% required employer contribution.
  - **Year 3:** Assumes 25 full-time teacher positions. Salary assumes an annual rate of growth of 3%. Projected Year 3 salary of \$41,905.55 for each teacher, with a 9% required employer contribution.
- **Teacher-Special Education**
  - **Year 1:** Assumes 1 full-time special education teacher position. Projected Year 1 salary of \$41,500.00, with a 9% required employer contribution
  - **Year 2:** Assumes 1 full-time and 1 part-time special education teacher position. Salary assumes an annual growth rate of 3%. Projected Year 2 salary of \$42,745.00 for each special education teacher, with a 9% required employer contribution.
  - **Year 3:** Assumes 2 full-time special education teacher positions. Salary assumes an annual growth rate of 3%. Projected Year 3 salary of \$44,027.35 for each special education teacher, with a 9% required employer contribution
- **Instructional Assistants-Regular Education**
  - **Year 1:** N/A
  - **Year 2:** N/A
  - **Year 3:** Assumes 2 full-time Instructional Assistant (IA) - Regular Education positions. Projected Year 3 hourly rate of \$12.00, with a 9% required employer contribution.
- **Receptionist**
  - **Year 1:** N/A
  - **Year 2:** Assumes 1 full-time receptionist position. Projected Year 2 hourly rate of \$12.00, with a 9% required employer contribution.
  - **Year 3:** Hourly rate assumes an annual growth rate of 3%. Projected Year 3 hourly rate of \$12.36, with a 9% required employer contribution.
- **Office Manager/Registrar**
  - **Year 1:** Assumes 1 full-time Office Manager/Registrar position. Projected Year 1 salary of \$38,500.00, with a 9% required employer contribution
  - **Year 2:** Salary assumes an annual growth rate of 3%. Projected Year 2 salary of \$39,655.00, with a 9% required employer contribution.
  - **Year 3:** Salary assumes an annual growth rate of 3%. Projected Year 3 salary of \$40,844.65, with a 9% required employer contribution
- **Custodial/Maintenance**
  - **Year 1:** Assumes 1 full-time custodial/maintenance position. Projected Year 1 hourly rate of \$11.50, with a 9% required employer contribution.

- *Year 2: Hourly rate assumes an annual growth rate of 3%. Projected Year 2 hourly rate of \$11.85, with a 9% required employer contribution.*
- *Year 3: Hourly rate assumes an annual growth rate of 3%. Projected Year 3 hourly rate of \$12.20, with a 9% required employer contribution.*

**Employee Benefits:**

**Approx. 2.74% of the budget (Year 1 – Year 3)**

Assumes Somerset Academy West Valley will utilize a qualified 403(b) plan that includes an anticipated employer contribution portion of 6%. All full-time employees will be eligible to receive this benefit.

**Employee Insurance:**

**Approx. 8.23% of the budget (Year 1 – Year 3)**

Somerset Academy West Valley will assume employer contribution towards each FTE's insurance premium is estimated at a rate of 18% of employee salaries. Employee insurance will cover all employees except for substitute teachers and other contracted services; as they are not employed by the school.

**Office Supplies (Paper, Postage, etc.):**

**Approx. 0.25% of the budget (Year 1 – Year 3)**

Assumes an annual Year 1 total of \$4,950.00 for supplies such as copy paper, envelopes, pens, labels, folders, notebooks, etc.; estimated at \$15.00 per student, incrementally increasing each year as student enrollment increases.

**Instructional Consumables:**

**Approx. 1.52% of the budget (Year 1 – Year 3)**

Assumes an annual Year 1 total of \$23,760.00 for instructional consumables; estimated at \$90.00 per student, includes items that can't be used more than once or by multiple students (i.e. Workbooks). Incrementally increasing each year as student enrollment increases.

**Membership Dues, Registrations, & Travel:**

**Approx. 0.10% of the budget (Year 1 – Year 3)**

Assumes Somerset Academy West Valley will engage with the Arizona Charter Schools Association at a \$4.50 per student annual membership rate. Additionally, Somerset Academy West Valley would like to send the school principal, annually, to the National Charter School Conferences which will be estimated based on the location of the 2019 conference. (*Year 1 expenses are covered in the start-up budget*).

Below are the travel costs associated with the travel to the 2021 & 2022 National Charter School Conferences:

Assumptions (GSA.gov):	2021 National Charter School Conference (TBD)			
	Date - TBD			
	Travel Expense	Travel Costs	Days/Nights	Total Costs
	Registration:	\$ 790.00		\$ 790.00
	Airfare:	\$ 386.00		\$ 386.00
	Per Diem:	\$ 61.00	5 days	\$ 305.00
	Hotel:	\$ 111.00	4 nights	\$ 444.00
			Total:	\$ 1,925.00
			<b>Rounding estimation per person:</b>	<b>\$ 1,950.00</b>

Assumptions (GSA.gov):	2022 National Charter School Conference (TBD)			
	Date - TBD			
	Travel Expense	Travel Costs	Days/Nights	Total Costs
	Registration:	\$ 790.00		\$ 790.00
	Airfare:	\$ 386.00		\$ 386.00
	Per Diem:	\$ 61.00	5 days	\$ 305.00
	Hotel:	\$ 111.00	4 nights	\$ 444.00
			Total:	\$ 1,925.00
			<b>Rounding estimation per person:</b>	<b>\$ 1,950.00</b>

Membership Dues, Registrations, & Travel - Summary				
Expense	Year 1	Year 2	Year 3	
Arizona Charter Schools Association Membership	Covered in Start-Up Budget	\$ 1,683.00	\$ 2,277.00	
2020 National Charter School Conference (TBD)	Covered in Start-Up Budget			
Travel to Somerset Affiliate Schools in Florida (Miami, FL)	Covered in Start-Up Budget			
Travel to Somerset Affiliate Schools in Nevada (Las Vegas, NV)	Covered in Start-Up Budget			
2021 National Charter School Conference (TBD)		\$ 1,950.00		
2022 National Charter School Conference (TBD)			\$ 1,950.00	
<b>Total:</b>	<b>\$ -</b>	<b>\$ 3,633.00</b>	<b>\$ 4,227.00</b>	

### Contracted Services - IT:

*Approx. 0.88% of the budget (Year 1 – Year 3)*

Somerset Academy West Valley plans to contract with an IT service provider similar to Intellatek (IT service provider based in Nevada). Expenses for IT services are based on Intellatek pricing. IT services will include set-up and continual maintenance/monitoring of computers, server, network, firewall and other technology related hardware. For continual maintenance/monitoring of technology related hardware for the school, a fee of \$3.50 per month per student is necessary to insure quality work is being done and the needs of the school are being met taking into consideration enrollment growth (equates to \$42.00 per year per student).

	<b>Year</b>	<b>Rate per-pupil</b>	<b>Student Counts</b>	<b>Set-Up Fees</b>	<b>Annual Cost</b>
<b>Information Technology Services</b>	1	\$ 42.00	264	\$ 5,000.00	\$ 16,088.00
	2	\$ 42.00	374	\$ 2,500.00	\$ 18,208.00
	3	\$ 42.00	506	\$ 2,500.00	\$ 23,752.00

Somerset Academy West Valley plans to contract with a similar IT service provider that can provide equal/better services at an equal/similar affordable price insuring the qualification the school requires are being met.

#### **Contracted Services - Special Education:**

**Approx. 1.60% of the budget (Year 1 – Year 3)**

Somerset Academy West Valley will assume that the percentage of students with disabilities enrolled will be 15% based on local and state averages. This approach is used for planning purposes as specific needs will not be known until students are evaluated. Prices below reflect the pricing provided by Ridge Zellar Therapy, a therapy services group who provide comprehensive hearing screenings, trainings & in-services, psychoeducational services, occupational therapy, and speech therapy. Assumes the follow pricing/hours for each year:

	<b>\$/hr</b>	<b>Chance %</b>
Psychologist	\$ 72.00	15%
Speech Therapist	\$ 63.00	8%
Physical Therapy	\$ 72.00	2%
Occupational Therapy	\$ 72.00	5%

<b>Year 1</b>		<b># of Students</b>	<b>Reevaluation Tests</b>	<b>Initial Tests</b>	<b>Total Cost</b>
Psychologist		40	\$ 6,600.00	\$ 2,500.00	\$ 9,100.00
		<b># of Students</b>	<b>Hours</b>	<b>Total Cost</b>	
Speech Therapist		21	140	\$ 8,820.00	
Physical Therapy		5	25	\$ 1,800.00	
Occupational Therapy		13	87	\$ 6,240.00	
				<b>Total: \$ 25,960.00</b>	
<b>Year 2</b>		<b># of Students</b>	<b>Reevaluation Tests</b>	<b>Initial Tests</b>	<b>Total Cost</b>
Psychologist		56	\$ 9,333.33	\$ 2,500.00	\$ 11,833.33
		<b># of Students</b>	<b>Hours</b>	<b>Total Cost</b>	
Speech Therapist		30	200	\$ 12,600.00	
Physical Therapy		7	35	\$ 2,520.00	
Occupational Therapy		19	127	\$ 9,120.00	
				<b>Total: \$ 36,073.33</b>	
<b>Year 3</b>		<b># of Students</b>	<b>Reevaluation Tests</b>	<b>Initial Tests</b>	<b>Total Cost</b>
Psychologist		76	\$ 12,666.67	\$ 2,500.00	\$ 15,166.67
		<b># of Students</b>	<b>Hours</b>	<b>Total Cost</b>	
Speech Therapist		40	267	\$ 16,800.00	
Physical Therapy		10	50	\$ 3,600.00	
Occupational Therapy		25	167	\$ 9,120.00	
				<b>Total: \$ 44,686.67</b>	

If the special education population comes in lower than expected, remaining funds may be used for other contracted services that the principal deems necessary for the growth and success of the school.

**Curriculum & Resource Materials:**

***Approx. 0.46% of the budget (Year 1 - Year 3)***

Projected annual Year 1 total of \$7,128.00 for Curriculum & Resource Materials; estimated at \$27.00 per student, incrementally increasing each year as student enrollment increases.

**SIS Software:**

***Approx. 0.32% of the budget (Year 1 - Year 3)***

Assumes Somerset Academy West Valley will use Infinite Campus, an education software utilized by both the faculty of the school and parents/guardians of the students, annual projected cost at \$6,000 slightly increasing each year as student enrollment increases.

**Auditor/Legal Fees:**

***Approx. 0.58% of the budget (Year 1 - Year 3)***

An accounting firm that is familiar with federal and state accounting practices and is familiar with Arizona charter school audits, preferably charter schools, will provide Somerset Academy West Valley's annual audit. Somerset Academy West Valley will not incur an audit fee in the first year of operation as the first audit will take place in September following the first fiscal year. Somerset Academy West Valley will search for a firm familiar with Arizona charter schools, but based pricing on the rates given by Binder Dijker Ote (BDO), an accounting firm, who has and is currently serving charter schools similar in size of the proposed charter. The auditing services provided, which include the auditing of school finances for annual reporting, IRS reporting, and legal compliance; are priced at \$15,000 per year.

	<b>Year</b>	<b>Annual Cost</b>
<b>Audit Services</b>	1	\$ -
	2	\$ 15,000.00
	3	\$ 15,000.00

Somerset Academy West Valley aims to contract with one or more legal firms to provide legal expertise for any school specific issues that may arise during the schools' operation. Pricing is based on the rates given by Wolfe & Wyman LLP a law firm, who has and is currently serving charter schools similar in size of the proposed charter. Somerset Academy West Valley will research firms endorsed by the Arizona Charter School Association/Charter Marketplace to ensure quality legal services, which include business/tax/regulatory issues; priced at \$2,000 in Year 1 and \$5,500 each year thereafter.

	<b>Year</b>	<b>Annual Cost</b>
<b>Legal Services</b>	1	\$ 2,000.00
	2	\$ 5,500.00
	3	\$ 5,500.00

**Substitute Teachers:**

***Approx. 1.53% of the budget (Year 1 - Year 3)***

Somerset Academy West Valley will contract with a staffing agency for substitute teachers. Pricing is based on the rates given by Kelly Educational Staffing, an experienced provider of substitute teachers nationwide, who has and is currently serving charter schools similar in size of the

proposed charter. The substitute teacher services provided, which include educational staffing and placement needs; are conservatively priced at \$165 per day, for 10 days per teacher.

	<b>Year</b>	<b># of Teachers</b>	<b>Cost (per day)</b>	<b># of days (per teacher)</b>	<b>Annual Cost</b>
<b>Substitute Teacher Services</b>	1	15	\$ 165.00	10	\$ 24,750.00
	2	21	\$ 165.00	10	\$ 33,825.00
	3	27	\$ 165.00	10	\$ 44,550.00

### *Operations & Maintenance (O&M) EXPENDITURES*

#### **Supplies:**

**Approx. 0.25% of the budget (Year 1 – Year 3)**

Assumes an annual Year 1 total of \$4,950.00 for O&M supplies; estimated at \$15.00 per student, incrementally increasing each year as student enrollment increases.

#### **Marketing/Advertising:**

**Approx. 0.00% of the budget (Year 1 – Year 3)**

Somerset Academy West Valley will market via multiple modes to ensure that all families are informed of their educational options. The marketing campaign includes: school website, social media such as Facebook, flyers, direct mailers, advertisements in varying English and Spanish media, building relationships with community groups, and a door-to-door approach. Somerset Academy West Valley will post flyers in local public facilities such as the post office, community centers, and other locations of public access. The goal is to reach parents and legal guardians by using various means of information delivery. Promotional flyers and/or postcards will be distributed via direct mail and/or through community groups and churches to ensure that families are aware of the school and their eligibility to apply for enrollment. (**All marketing expenses are covered in the start-up budget**)

Using the marketing budget listed in **Section C.2** as well as **Section C.4**, Somerset Academy West Valley believes the marketing costs are adequate and viable to attract the projected number of students; based on the experience of Somerset Academy Inc. which has a high success rate of meeting/exceeding projected enrollment numbers when using the various marketing methods listed above.

#### **Contracted Services – O&M:**

**Approx. 2.53% of the budget (Year 1 – Year 3)**

Assumes Somerset Academy West Valley will contract with Academica (*Management Fee – \$450 per student*) – Academica is an Educational Management Service Provider whose services to Somerset Academy West Valley shall include, but may not be limited to, the following:

- Identification, design, and procurement of facilities and equipment
- Staffing recommendations and human resource coordination
- Regulatory compliance and state reporting
- Legal and corporate upkeep
- Public relations and marketing
- The maintenance of the books and records of the charter school
- Bookkeeping, budgeting and financial forecasting

Minimal management fee expense during the first three years of operation. The budget assumes no management fee expense in Year 1 to allow the school to grow and utilize funds for other necessary expenses. The management fee in Year 2 increases to \$150 per student and then increasing to \$300 per student in Year 3; incrementally increasing each year thereafter without being a financial burden to the school, eventually reaching the true contracted amount of \$450 per student.

**Building Rent/Lease/Loan:**

***Approx. 17.33% of the budget (Year 1 - Year 3)***

The Somerset Academy West Valley Board will secure a facility lease in time for the commencement of school operations. Somerset Academy West Valley has set aside \$1,025 per pupil for facility rent each year. Assumes Somerset Academy West Valley will utilize a facility of approx. 40,000 sq. ft. The facility will allow for necessary classrooms, computer labs, science labs, multi-purpose room, and office space needed. Academica manages over one-hundred schools nationwide, with a majority that have facilities with the model of adequate square feet per students that the anticipated facility will offer. Year 1 rent total of \$270,600.00, increasing as student enrollment increases. Discussions regarding a facility lease agreement has yet to be finalized; however, this projection provides a more than adequate depiction of the anticipated rental cost.

**Building & Improvements:**

***Approx. 0.18% of the budget (Year 1 - Year 3)***

Somerset Academy West Valley will enter into contracts for a/c repair, pest control, among other building maintenance contracts based upon the needs of the school. Somerset Academy West Valley will receive multiple bids before making their selection, and will reach out to vendors listed in the Charter Marketplace to request bids. Pricing is dependent upon the finalization of a facility lease, as certain maintenance aspects may not be needed. Assumes a Year 1 budget for \$2,500.00 as most building & improvement expenses will be covered using start-up funds; increasing to \$5,000.00 for Years 2 & 3.

**Land Improvements:**

***Approx. 0.10% of the budget (Year 1 - Year 3)***

Somerset Academy West Valley will enter into contracts for lawn care, among other land & improvements contracts based upon the needs of the school. Somerset Academy West Valley will receive multiple bids before making their selection, and will reach out to vendors listed in the Charter Marketplace to request bids. Pricing is dependent upon the finalization of a facility lease, as certain maintenance aspects may not be needed. Assumes a Year 1 budget for \$1,500.00 as most land & improvement expenses will be covered using start-up funds; increasing to \$2,500.00 for Years 2 & 3.

**Fees/Permits:**

***Approx. 0.10% of the budget (Year 1 - Year 3)***

Assumes an annual amount of \$2,000.00 for Year 1 - 3 for fees/permits such as health inspection, fire inspection, and certificate of occupancy. Based on charter schools of similar size.

**Property/Casualty Insurance:**

***Approx. 0.42% of the budget (Year 1 - Year 3)***

Assumes \$750 a month for property/casualty insurance based upon conservative figures provided by The Mahoney Group and by other charter schools working with Academica of similar size. Increasing by 3% each subsequent year thereafter. The first month in Year 1 will be covered under the Start-up Budget.

**Liability Insurance:**

***Approx. 0.42% of the budget (Year 1 – Year 3)***

Assumes \$750 a month for liability insurance based upon conservative figures provided by The Mahoney Group and by other charter schools working with Academica of similar size. Increasing by 3% each subsequent year thereafter. The first month in Year 1 will be covered under the Start-up Budget.

**Utilities (Electric, Gas, Water, Waste):**

***Approx. 3.20% of the budget (Year 1 – Year 3)***

Assumes \$63,000.00 in utility costs for Year 1 based on a total square footage of approximately 40,000 at a rate of \$1.75/square foot. Assumes the school will not utilize the full space available during Year 1. Increasing by 3% each subsequent year thereafter.

**Phone/Communications/Internet Connectivity:**

***Approx. 0.70% of the budget (Year 1 – Year 3)***

Somerset Academy West Valley will likely purchase phone & internet services through Cox Communication. Assumes \$1,250 a month for Year 1 based on rates given by Cox Communications, who has and is currently serving charter schools similar in size of the proposed charter. Includes the anticipatory yearly expansion of the school. Rate is assumed to increase by 3% each subsequent year thereafter.

**Transportation:**

***Approx. 0.00% of the budget (Year 1 – Year 3)***

Assumes no cost because transportation to and from school will not be provided at Somerset Academy West Valley.

**Food Service:**

***Approx. 0.05% of the budget (Year 1 – Year 3)***

As outlined in **Section A.2**, Somerset Academy West Valley projects approximately 80% of the student population will qualify for free and reduced lunch, as the school assumes it will qualify for reimbursed student meals from the National School Lunch Program and School Breakfast Program. Assumes that meals will be paid for by students not eligible for these programs. The amount of \$1,000 per year has been budgeted in Years 1 - 3 for any potential overages or one-time costs associated with providing food services.

**Student Furniture/Office Furniture/Student Technology/Office Technology Equipment:**

***Approx. 3.86% of the budget (Year 1 – Year 3)***

FFE Lease: Instructional Equipment / Computers / Furniture / Fixtures - Utilizing Academica's standing relationship with the lending institution Vectra Bank will allow Somerset Academy West Valley to lease all their furniture, fixtures, and equipment in the first year of the school over a 48-

month period. The lease will include a 5% residual purchase option at the end of 48 months or an early purchase option in the 45<sup>th</sup> month for a 6% residual. The proposed campus will likely enter into this lease agreement in their first year of operation. Somerset Academy West Valley budgets \$1,000 per student to outfit the entire school in its first year at a 5% interest rate over 4 years.

Below is a yearly breakdown of the anticipated FFE cost over the first 3 years, including the anticipated total borrowed amounts and lease payments each year:

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	
<b>Planned Enrollment:</b>	264	374	506	
<b>Borrowed Amount:</b>	\$ 264,000.00	\$ 110,000.00	\$ 132,000.00	
	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Total</b>
<b>Year 1</b>	\$ 48,637.84			\$ 48,637.84
<b>Year 2</b>	\$ 72,956.76	\$ 20,265.76		\$ 93,222.52
<b>Year 3</b>	\$ 72,956.76	\$ 30,398.64	\$ 24,318.96	\$ 127,674.36
<b>Year 4</b>	\$ 72,956.76	\$ 30,398.64	\$ 36,478.44	\$ 139,833.84
<b>Year 5</b>	\$ 24,318.92	\$ 30,398.64	\$ 36,478.44	\$ 91,196.00
<b>Year 6</b>		\$ 10,132.88	\$ 36,478.44	\$ 46,611.32
<b>Year 7</b>			\$ 12,159.48	\$ 12,159.48

These projected totals are divided into the four equipment categories: Student Furniture & Other Equipment, Office Furniture & Other Equipment, Student Technology Equipment, & Office Technology Equipment. Instructional items may also be purchased using the funds from these leases. Somerset Academy West Valley believes the equipment costs listed above are adequate and viable to account for the anticipated student enrollment each year based on the experience.

#### **Other Leases (Security, Copiers, etc.):**

**Approx. 0.58% of the budget (Year 1 – Year 3)**

Copier/Printing – Anticipated copier lease at a rate of \$1,075 per month, \$12,900 annually. Increasing by 3% each subsequent year thereafter. Includes a cushion to account for overages in printing, which will also incrementally increase as student enrollment increases. Figures based upon figures provided by other charter schools of similar size currently working with Academica. The first month in Year 1 will be covered under the Start-up Budget.

#### **Loan Repayment:**

**Approx. 0.98% of the budget (Year 1 – Year 3)**

To repay Somerset Academy, Inc.'s no interest start-up loan of \$165,000.00. Initial Year 1 annual payment of \$15,000.00 and then annual repayments of \$25,000.00 each year thereafter until total debt is paid. Larger payments may be made if Somerset Academy West Valley's enrollment is larger than 95% of its planned enrollment.

#### **Payroll Services:**

**Approx. 0.27% of the budget (Year 1 – Year 3)**

The cost of payroll services is assumed based upon the figures provided by other charter schools working with Academica. It costs \$20 per employee per month to process payroll, bringing us to an annual total cost of \$240 per employee.

**Affiliation Fee:**

***Approx. 1.00% of the budget (Year 1 - Year 3)***

Somerset Academy, Inc. Affiliation Fee – 1.00% of State Funding (Equalization Assistance) – Trademark License Agreement between Somerset Academy, Inc. (“Licensor”), and the school, Somerset Academy West Valley (“Licensee”). Somerset Academy, Inc. grants Somerset Academy West Valley a non-exclusive, non-transferable, royalty-free license to use the trademark in connection with the development and establishment of the school of Somerset Academy West Valley in the State of Arizona.

- 0.50% of the 1.00% Somerset Academy, Inc. Affiliation Fee is used for Professional Development

## C.5 Three Year Operational Plan

Applicant Name: Somerset Academy West Valley

Provide Assumptions by Line		Three Year Operational Budget - 2016-2017 / 2017-2018 / 2018-2019									
		First Year			Second Year			Third Year			
STUDENT COUNT (at full enrollment)			264.00			374.00				506.00	
Number of Students (Budget based on)			251.00			355.00				480.00	
% of Full Enrollment Budget Based On			95.08%			94.92%				94.86%	
<b>CARRYOVER (Balance from Start-Up Budget in year 1 or previous year)</b>			\$ 61,544.50			\$ 6,700.54				\$ 19,154.83	
<b>REVENUE</b>			<b>\$ Amount</b>			<b>\$ Amount</b>			<b>\$ Amount</b>		
State Funding (Equalization Assistance)			\$ 1,502,072			\$ 2,229,414				\$ 3,005,323	
Secured Funds - Private Donations											
Secured Funds - Loans											
Secured Funds - Other											
<b>Total Revenue</b>			\$ 1,502,072			\$ 2,229,414				\$ 3,005,323	
<b>Administration, Instruction, &amp; Support (AIS) EXPENDITURES</b>	<b># of Staff</b>	<b>@ Salary</b>	<b>Req. Cont.</b>	<b>Total</b>	<b># of Staff</b>	<b>@ Salary</b>	<b>Req. Cont.</b>	<b>Total</b>	<b># of Staff</b>	<b>@ Salary</b>	<b>Req. Cont.</b>
(add lines as necessary)											
Salaries											
Director/Principal	1.00	\$ 80,000.00	\$ 7,200.00	\$ 87,200.00	1.00	\$ 82,400.00	\$ 7,416.00	\$ 89,816.00	1.00	\$ 84,872.00	\$ 7,638.48
Teacher-Regular Education	14.00	\$ 39,500.00	\$ 3,555.00	\$ 602,770.00	19.00	\$ 40,685.00	\$ 3,661.65	\$ 842,586.35	25.00	\$ 41,905.55	\$ 3,771.50
Teacher-Special Education	1.00	\$ 41,500.00	\$ 3,735.00	\$ 45,235.00	1.50	\$ 42,745.00	\$ 3,847.05	\$ 69,888.08	2.00	\$ 44,027.35	\$ 3,962.46
Instructional Assistants-Regular Education	-	\$ -	\$ -	\$ -	-	\$ -	\$ -	\$ -	2.00	\$ 18,240.00	\$ 1,641.60
Instructional Assistants-Special Education	-	\$ -	\$ -	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	\$ -
Clerical	-	\$ -	\$ -	\$ -	1.00	\$ 18,240.00	\$ 1,641.60	\$ 19,881.60	1.00	\$ 18,787.20	\$ 1,690.85
Bookkeeper/Finance/Registrar/Office Manager	1.00	\$ 38,500.00	\$ 3,465.00	\$ 41,965.00	1.00	\$ 39,655.00	\$ 3,568.95	\$ 43,223.95	1.00	\$ 40,844.65	\$ 3,676.02
Custodial/Maintenance	1.00	\$ 22,080.00	\$ 1,987.20	\$ 24,067.20	1.00	\$ 22,742.40	\$ 2,046.82	\$ 24,789.22	1.00	\$ 23,424.67	\$ 2,108.22
Other: Assistant Principal	-	\$ -	\$ -	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	\$ -
Other: Counselor	-	\$ -	\$ -	\$ -	-	\$ -	\$ -	\$ -	-	\$ -	\$ -
Employee Benefits				\$ 44,104.80				\$ 60,010.19			\$ 80,406.12
Employee Insurance (if applicable)				\$ 132,314.40				\$ 180,030.58			\$ 241,218.35
Office Supplies (Paper, Postage, etc.)				\$ 3,960.00				\$ 5,610.00			\$ 7,590.00
Instructional Consumables				\$ 23,760.00				\$ 33,660.00			\$ 45,540.00
Membership Dues, Registrations, & Travel				\$ -				\$ 3,633.00			\$ 4,227.00
Contracted Services IT				\$ 16,088.00				\$ 18,208.00			\$ 23,752.00
Contracted Services (Special Education)				\$ 25,960.00				\$ 36,073.33			\$ 44,686.67
Curriculum & Resource Materials				\$ 7,128.00				\$ 10,098.00			\$ 13,662.00
Library Resources/Software				\$ -				\$ -			\$ -
SIS Software (Infinite Campus)				\$ 6,000.00				\$ 7,000.00			\$ 8,000.00
Auditor Fees / Legal Fees				\$ 2,000.00				\$ 20,500.00			\$ 20,500.00
Other: Subst. Teachers (10days/Teacher)				\$ 24,750.00				\$ 33,825.00			\$ 44,550.00
<b>Total Administration, Instruction, &amp; Support</b>				\$ 1,087,302.40				\$ 1,498,833.30			\$ 1,994,843.29
<b>Operations &amp; Maintenance (O&amp;M) EXPENDITURES</b>				<b>Total</b>				<b>Total</b>			<b>Total</b>
(add lines as necessary)											
Supplies				\$ 3,960.00				\$ 5,610.00			\$ 7,590.00
Marketing/Advertising				\$ -				\$ -			\$ -
Contracted Services - O&M				\$ -				\$ 56,100.00			\$ 151,800.00
Building Rent/Lease/Loan				\$ 270,600.00				\$ 383,350.00			\$ 518,650.00
Building & Improvements				\$ 2,500.00				\$ 5,000.00			\$ 5,000.00
Land & Improvements				\$ 1,500.00				\$ 2,500.00			\$ 2,500.00
Fees/Permits				\$ 2,000.00				\$ 2,000.00			\$ 2,000.00
Property/Casualty Insurance				\$ 8,250.00				\$ 9,270.00			\$ 9,548.10
Liability Insurance				\$ 8,250.00				\$ 9,270.00			\$ 9,548.10
Utilities (Electric, Gas, Water, Waste)				\$ 63,000.00				\$ 70,000.00			\$ 72,100.00
Phone/Communications/Internet Connectivity				\$ 13,750.00				\$ 15,450.00			\$ 15,913.50
Transportation				\$ -				\$ -			\$ -
Food Service				\$ 1,000.00				\$ 1,000.00			\$ 1,000.00
Student Furniture & Other Equipment				\$ 12,159.46				\$ 23,305.63			\$ 31,918.59
Office Furniture & Other Equipment				\$ 12,159.46				\$ 23,305.63			\$ 31,918.59
Student Technology Equipment				\$ 12,159.46				\$ 23,305.63			\$ 31,918.59

Office Technology Equipment				\$ 12,159.46			\$ 23,305.63				\$ 31,918.59
Other Leases (Security, Copiers, etc.)				\$ 11,825.00			\$ 12,179.75				\$ 12,545.14
Loan Repayment				\$ 15,000.00			\$ 25,000.00				\$ 25,000.00
Other: Payroll Services				\$ 4,320.00			\$ 5,880.00				\$ 7,920.00
Other: Somerset, Inc. Affiliation Fee (1%)				\$ 15,020.72			\$ 22,294.14				\$ 30,053.23
<b>Total Operations &amp; Maintenance</b>				<b>\$ 469,613.56</b>			<b>\$ 718,126.41</b>				<b>\$ 998,842.43</b>
<b>Total Expenditures</b>				<b>\$ 1,556,915.96</b>			<b>\$ 2,216,959.71</b>				<b>\$ 2,993,685.72</b>
<b>Total Revenues</b>				<b>\$ 1,563,616.50</b>			<b>\$ 2,236,114.54</b>				<b>\$ 3,024,477.83</b>
<b>Budget Balance (=Revenues-Expenditures)</b>				<b>\$ 6,700.54</b>			<b>\$ 19,154.83</b>				<b>\$ 30,792.11</b>

**2020-2021 Application for New Charter**  
**Arizona State Board for Charter Schools**

**Projected Revenue Calculator**

**A. Enter Estimated Student Counts**

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
Kinder	104	104	125
Grades 1-3	147	209	271
Grades 4-8		42	84
Grades 9-12			
Total	251	355	480

**B. Will you have a 200 Day Calendar?**

No	No	No
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**C. Enter Estimated Student Count Add-On Numbers\***

Hearing Impairment			
ELL (English Learners)			
MD-R, A-R, and SID-R			
MD-SC, A-SC, and SID-SC			
Multiple Disabilities Severe Sensory Impairment			
Orthopedic Impairment (Resource)			
Orthopedic Impairment (Self-Contained)			
DD, ED, MIID, SLD, SLI, and OHI			
Emotionally Disabled (Private)			
Moderate Intellectual Disability			
Visual Impairment			

**D. Estimated Equalization Revenue**

\$	1,502,072	\$	2,229,414	\$	3,005,323
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**Instructions:**

1. Enter the estimated student counts (budget based on, not full enrollment) used in the Three Year Operational Budget, separated by grade level. Kindergarten students should be entered as a head count figure - the worksheet will automatically divide by two for Section A.
2. Confirm that the numbers align with the figures provided in the narrative for C.2 Advertising & Promotion.
3. If you will be operating with a 200 day calendar, change the 'No' in line B to 'Yes.'
4. If you choose to enter estimated counts for student count add-ons, enter whole numbers in Section C. Numbers for Kindergarten students should be divided by 2 for Section C only. These numbers are not required, and if used must be supported in the assumptions and be consistent with the Target Population described in Section A.2. The add-ons for K-3 and K-3 Reading are automatically included in the Estimated Equalization Revenue.
5. Enter the Estimated Equalization Revenue figures from line D into line 12 of C.5 Three Year Operational Budget.
6. Upload this complete Excel file or a PDF copy of the completed "Enter Data Here" sheet only, into C.5 Three Year Operation Budget section of the online application wizard.

**Authorized  
Representative and  
Charter Principal  
Resumes**

# Ana Cristina Diaz

Mobile: ( [REDACTED]

E-mail: [REDACTED]

## MISSION

To utilize my skills and areas of expertise to benefit student achievement and enhance the professional development of educators as a school site instructional leader.

## EDUCATION

May 2006	Nova Southeastern University, Miami Florida <b>Educational Leadership Certification</b>
December 1998	University of Florida, Gainesville Florida <b>Master of Education, Elementary Education</b>
December 1997	University of Florida, Gainesville Florida <b>Bachelor of Arts in Education, Elementary Education</b>

## PROFESSIONAL EXPERIENCE

June 2014 - Present	<b>Principal</b> Pinecrest Preparatory Academy Charter School Miami, Florida <ul style="list-style-type: none"><li>• Serve as the chief administrator of the school in developing and implementing policies, programs, curriculum activities and budgets in a manner that promotes the educational development of each student.</li><li>• Supervise and promote the professional development of all school personnel</li></ul>
December 2006- June 2014	<b>Assistant Principal</b> Pinecrest Academy South Campus Charter School Miami, Florida <ul style="list-style-type: none"><li>• Served as a school site administrator and instructional leader responsible for managing the learning environment.</li></ul>
August 2005-December 2006	<b>Reading Coach/Interim Lead Teacher</b> Pinecrest Academy South Campus Charter School Miami, Florida <ul style="list-style-type: none"><li>• Provided continuous professional development to improve teachers' ability to enhance students' achievement in literacy leadership to teachers.</li></ul>
August 1999-June 2005	<b>Reading Coach/First Grade Teacher</b> Caribbean Elementary Miami-Dade County Public Schools, Miami, Florida <ul style="list-style-type: none"><li>• Responsible for the implementation of the Direct Instruction Reading Program including assessing student needs and monitoring student progress.</li><li>• Served as First Grade Chairperson responsible for coordinating planning sessions and assessing curricular needs.</li></ul>

## PROFESSIONAL AFFILIATIONS

May 2013 – Present	<b>Director/Secretary</b> Somerset Academy Inc. Board of Directors Miami, Florida <ul style="list-style-type: none"><li>• Adopt policies to guide school operations and administration in monitoring progress toward achieving school goals.</li></ul>
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- Direct and oversee long-range planning of the educational program and facilities, keeping the focus on high student achievement.
- Hire outstanding educational leaders and hold them accountable for high student achievement and for the efficient operation of the school system.
- Approve budgets and secure financial support necessary to achieve the school's mission.
- Responsible for ensuring that Somerset schools provide a high-quality education for all students.

#### **ACCREDITATIONS**

Florida Professional Educator's Certificate

Caribbean Elementary EESAC Chairperson August 2003-June 2005

ESOL Endorsement

Educational Leadership Certification

#### **TECHNICAL SKILLS**

Proficient in Microsoft Windows, Microsoft Word, Microsoft Excel, Microsoft PowerPoint

Experience with Student Performance Indicator (SPI) Data

Bilingual: English/Spanish

#### **Qualifications, duties and responsibilities relevant to school site administration:**

- Develop the Master Schedule in accordance with the Miami-Dade County Public Schools Student Progression Plan.
- Serve as the Student Study Team (SST) member responsible for the implementation of the Response to Intervention (RtI) plan for instruction, progress monitoring and identification of students in need of additional support and possible referral for further evaluation.
- Develop professional growth presentations for teachers including:
  - The implementation of intensive intervention and progress monitoring for students
  - Reading instruction aligned to the latest research practices
  - Developing and assigning effective homework
  - Improving the accuracy and effectiveness of grading a student's ability to master state standards
- Observe and evaluate teacher performance through walk-through observations, grade level data chats and individual data chats.
- Plan and supervise supplementary services including after-school tutoring, pull-out tutoring and academic interventions.
- Identify and monitor the implementation of resources related to assessment data analysis.
- Interview and hire appropriate personnel.
- Plan and supervise school activities.
- Monitor the safety and security by coordinating student supervision.
- Serve as parent and teacher liaison responsible for resolving school related conflicts and concerns.
- Manage student discipline.
- Assists teachers with conflicts or concerns related to their profession.

**TODD GERMAN**



**Profile**

An entrepreneurial professional asset manager possessing excellent leadership, planning and communication skills developed over 30 years and founded upon the discipline, work ethic and team skills developed by service in the United States military.

**Professional Experience**

**FINANCIAL ADVISOR**  
**Keys Wealth Management**

Key West, Florida

2014-Present

**VICE PRESIDENT, RETAIL BANKING**  
**Centennial Bank** Key West, Florida

2007-2014

**ASSISTANT VICE PRESIDENT, HUMAN RESOURCES**  
**Keys Federal Credit Union** Key West, Florida

2002 – 2007

**FACILITIES OFFICER**  
**First State Bank of the Florida Keys** Key West, Florida

1997 – 2002

**PRESIDENT**  
**German Engineering** Virginia Beach, Virginia

1994 – 1997

**PARTNER**  
**Needful Things Antique Shop** Virginia Beach, Virginia

1994 – 1995

**SUPERINTENDENT**  
**Colonial Construction** Virginia Beach, Virginia

1987 – 1994

**Military**

**United Stated Army** Ft. Bragg, North Carolina 1983 – 1987

### **Community Activities**

**Vice Chair**, Somerset Academy Inc.

**President**, Southernmost Republican Club

**Committee Member**, Unlicensed Practice of Law Committee

**Chairman**, Hometown PAC

**Chair**, Key West Collegiate Academy

**Former Chair**, Key West Montessori Charter School

**Former President**, Key West Business Guild

**Former President**, Key West Botanical Society

**Former Chair**, Key West Citizens Review Board

**Former Board Member**, Eastern Virginia Offshore Racing Association

### **Awards**

**Centennial Bank** Employee of the Year

**Keys Federal Credit Union** Employee of the Year

**First State Bank** Employee of the Year

**City of Key West** commendation for pursuit and apprehension of bank robbers.

**United States Small Business Administration** commendation for relief work in the aftermath of Hurricane Georges.

### **Education**

**National Association of Federal Credit Unions Management Institute at LSU** Baton Rouge, LA

**Florida Keys Community College** Key West, Florida.

Studied Business Administration, Principles of Banking, Consumer Lending, Banking Law and HVAC I and II.

**Tidewater Community College** Norfolk, Virginia.

Studied Interior Design.

# LOURDES ISLA-MARRERO

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Enthusiastic Educator with a talent for making learning exciting and enjoyable. Motivated by the belief that all students can be successful learners by focusing on the student as a whole. In addition, skilled administrator with a passion for academic success by focusing students, parents, colleagues and teachers alike to implement the 7 habits of Highly Effective People in their daily lives.

## EXPERIENCE

10/2018 – CURRENT

### **DEAN OF BACHELORS PROGRAM IN ELEMENTARY EDUCATION, DORAL COLLEGE**

- Responsible for preparing and revising academic program plans for Doral College, promoting and serving as a model for teaching achievement and professional service in a hybrid setting.
- Develop strategies to achieve educational goals and objectives.
- Initiate academic integrity and quality education in the college or university by articulating college policy and procedure to members of the school.
- Set and establish academic goals for the department to achieve and also maintain high standards in academics and teaching processes.

07/2006 – 10/2018

### **PRINCIPAL, MATER GARDENS ACADEMY**

- 2014 National Blue Ribbon winner
- Carry out the school's philosophy and, mission and vision
- Work within the budget guidelines set forth each year.
- Prepared registration materials, organized classes, and created and maintain student's schedules.
- Maintain a safe learning environment.
- Manage and execute school policies, including the Student Code of Conduct.
- Hold faculty meetings on a regular basis and conduct Staff Observations and evaluations.
- Ensure the school is complaint with district and state requirements
- Work with community resources to create a meaningful partnerships for the school
- Prepare for and comply with FTE, ESOL, and ESE audit requirements
- Met regularly with parents and guardians to discuss children's progress.
- Encouraged interactive learning by incorporating educational software and the Internet.
- Planned and implemented creative and challenging programs in accordance with district, county, state and federal guidelines.
- Maintained accurate and complete records for students.
- Worked with other teachers and administrators to evaluate and revise elementary and middle school programs.
- Maintained certificate active by attending professional development
- Developed IEPs.
- Completed training courses to keep up-to-date with new teaching methods and developments in the field.
- Implement using students data to drive instruction

- Enforced the school's student discipline code of conduct using strategies in the 7 Habits.
- Preserved the confidentiality of student records and information at all times.
- Took part in professional organizations and continuing education courses.
- Determined student strengths and weaknesses through iReady, STAR testing and weekly assessments.
- Cooperated with parents to support students' learning and healthy development in school and at home.
- National School Lunch Program Coordinator for all Mater Schools.

07/2002 – 06/2006

### **ASSISTANT PRINCIPAL, MATER EAST ACADEMY**

- Boosted cultural awareness by incorporating children's literature from cultures around the world.
- Met regularly with parents and guardians to discuss children's progress.
- Observed and evaluated students' performance, behavior, social development and physical health.
- Supervised an average of 550 students in classrooms, halls, cafeterias, schoolyards and on field trips.
- Created an enjoyable and interesting learning environment for 550 students each year.
- Worked with other teachers and administrators to evaluate and revise elementary school programs.
- Pursued professional development continually by attending educational conferences and teacher training workshops.
- Developed IEPs.
- Enforced the school's student discipline code to deal with problem situations.
- Took part in professional organizations and continuing education courses.
- Designed and implemented the student of the month to be available to all students.
- Supervised and managed the National School Lunch Program for all Mater Academy Schools.
- Conduct staff observations
- Appointed as the LEA Representative for the ESE department

## **EDUCATION**

08 2006

### **SPECIALIST, NOVA SOUTHEASTERN**

04 2001

### **MASTERS OF SCIENCE IN TESOL, NOVA SOUTHEASTERN**

04 1999

### **BACHELORS OF SCIENCE IN ELEMENTARY EDUCATION, NOVA SOIUHTEASTERN**

## **SKILLS**

- Florida Teaching Certificate with
- Elementary Education
- ESOL Endorsement
- Gifted Endorsement
- Positive, encouraging and approachable
- Fluent in Spanish and English
- Creative thinker and problem solver
- Flexible and Communication
- Teamwork and conflict resolution
- Technology skills such as Microsoft 365

## **ACTIVITIES**

Somerset Academy, Inc. – Arizona volunteer Board Member 2018

- 1 year Board Chair

Somerset Academy, Inc. – Florida and Texas volunteer board member 2008-2019

- 8 years Vice Chair
- 2 Years Board Chair

# **Project Finance & Development Inc.**

Taylor Smith, President & Owner

Taylor Smith, President and founder of PFDI, specializes in charter school site location and development throughout Florida for various charter school networks and stakeholders. PFDI has established all of the Florida Educational Facilities Benefit Districts currently in existence.

Since 1998, PFDI, together with its affiliated companies, has financed and developed charter schools, school concurrency projects, public roads, residential developments, mixed-use projects, parking garages, P3 government facilities and mixed-use office/retail projects. The projects and tax-exempt financings total over \$960,000,000. PFDI development projects have involved the creation of complex ownership structures with multiple public and private stakeholders including corporations, municipalities, county governments, school districts, state agencies and not-for-profit institutions.

*Taylor Smith/PFDI Development Projects and Clients include:*

- Charter School Organizations served as developer or land entitlement/acquisition include Galileo School for Gifted Learning (Sanford, Florida), River City Science Academy (Jacksonville, Florida), Mater Academy (Mater Brighton Lakes, Poinciana Charter School, both in Osceola), Avalon Park Charter Schools (Orange), Renaissance Charter Schools (Homestead), Four Corners Charter School (Osceola), Cornerstone Charter School (Orange), Flora Ridge Charter School (Osceola), FAU Lab School (St. Lucie County), FSU Lab School (Leon County), Villages Charter Schools (Sumpter County), City of Pembroke Pines Charter Schools (all campuses – Broward County)
- Partner Developers: St. Joe Company, Emerson International, Core/Bank Atlantic, DR Horton, KB Homes, Newland Communities, Lennar Homes, Standard Pacific Homes
- Florida cities as clients: Orlando, Kissimmee, Belle Isle, Edgewood, Homestead, Pembroke Pines, Winter Park
- Florida School Districts as partners/clients: Osceola County, Lake County and Orange County
- Authorities: Dallas-Ft. Worth Airport, Orlando International Airport, Palm Beach International Airport, Miami-Dade Industrial Development Authority, Wilmington International Airport, Atlanta-Hartsfield International Airport

## **Taylor M. Smith Background**

Taylor Smith served on Florida's founding Charter School Review Panel as well as the Florida Greenways Commission.

Taylor Smith is a Florida native. After graduating from Spruce Creek High School, Smith attended Princeton University and completed graduate studies as a Fulbright Scholar and a Harry S. Truman Scholar to Australian National University. Smith has spent his entire career based out of Florida. Smith is an active volunteer leader and teacher in his Jacksonville community and enjoys spending time with his wife, Kathi and two children, Taylor and Virginia.