**UPDATED**

**Evaluation of the Request to Operate and Manage an Innovative School for the 2018-19 School Year**

**Process:**

The applicant submitted its original application based on the comprehensive needs assessment (CNA) published by the Innovative School District and a review of publicly available information, such as articles and websites.

This evaluation process has included multiple phases that are reflected in this revised evaluation form. The process has included the following: a review of the applicant’s original application; an in-person capacity interview; a review of supplemental information submitted by the applicant following the release of this original evaluation; and participation in negotiations discussions.

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**Executive Summary of Strengths**

The applicant is committed to identifying the current assets at the school and determining how to capitalize upon existing assets to drive student performance. The applicant has utilized lessons learned from existing schools to create The Romine Group Select Standards (TRG Select Standards). The standards include: 1) mission/vision; 2) leadership; 3) high quality staff; 4) curriculum; 5) assessment; 6) instruction; 7) remediation and enrichment; 8) special education/exceptional children; 9) restorative practices; 10) extracurricular programs; 11) operations; and 12) school improvement. These TRG Select Standards are utilized as a playbook at each of their schools and modified/adapted, as necessary, to meet the community’s needs.

**Executive Summary of Concerns**

Throughout the application, the applicant provided many assurances that it will ensure or provide training, supports, and systems for its students and teachers. However, the applicant did not describe how these services will be provided and what they will look like day-to-day. Overall, the application lacked detail and specificity. It is unclear what the instructional program will be and how it will dramatically increase student achievement. During the negotiations meeting, the applicant presented its Lesson Plan Creator and explained how teachers create lesson plans at TRG schools, as well as how leadership can monitor the creation and impact of lesson plans. However, and despite meeting the criteria defined under “Addressing the Needs of the Specific Innovative School,” at no point during the evaluation period did the applicant sufficiently describe how it will align with the school’s mission or the targeted student population.

Further, the applicant has a mixed record of results in improving performance of persistently low-performing schools or improving performance of a substantial number of underperforming students with a school or schools operated by TRG, including its school in the state of North Carolina. In a letter from the Capital Encore Academy Board President submitted to Mr. Dave Machado, the Director of Office of Charter Schools (and addressed at the February 28, 2018 State Board of Education meeting), the Board formally requested an amendment to its charter. The Board is seeking to postpone the opening of its high school, due to “…our lack of satisfaction in the area of assessment performance.” The Board President of Capital Encore Academy noted “While we have continued to show growth in EVAAS, as well as in our self-adaptive growth assessments, we have not earned satisfactory...
achievement scores or School Performance Grades.” This letter acknowledges the mixed record of results of TRG, particularly in the state of North Carolina.

Finally, the applicant did not meet the expectations outlined by the Innovative School District in the areas of School Culture and Civil Liability and Insurance (although the requirements pertaining to Civil Liability and Insurance could be remedied through ongoing negotiations and the contracting process).

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Addressing the Needs of the Specific Innovative School

Qualified education service providers should have a clear understanding of the unique needs of the school or schools they wish to serve. In addition, providers must clearly demonstrate an understanding of the school’s comprehensive needs assessment.

The applicant:

• Describes its interest in the specific community.
• Explains how the model and its commitment to serve this population, including the grade levels, will meet the student and community needs and align with the mission of the ISD.
• Describes the specific ways the applicant will engage and transform the existing school culture as it prepares to open and during the first year of operation, as well as the plan for the school it wishes to serve.
• Describes the applicant’s experiences with partnering with local school districts, and its plans for engaging and partnering with other schools and the local school district where the innovative school is located.
• Describes how the applicant intends to engage the local community and the strategies that will be used to engage partners to address academic and non-academic barriers to achievement.
• Explains how the organization will establish a school-community identity, while simultaneously respecting and reinforcing the building history, role in the community, and campus identity.
• Identifies organizations, agencies, or consultants that are partners in planning and establishing the school, along with a brief description of current and planned role and resources that have contributed to the school’s development. Applicants new to North Carolina describe how previous work has prepared them to establish relationships and supports in this new community.

Summary of Strengths

• The Romine Group (TRG) currently manages and operates one charter school in North Carolina. During the capacity interview, the applicant described wanting to expand its reach in North Carolina and capitalize upon economies of scale.
• The applicant cited the comprehensive needs assessment (CNA) and indicated that the school would implement TRG Select Standards. Beyond this, little information was provided in the original application that explained how the model would meet the student and community needs. Throughout the capacity interview, the applicant described the TRG Select Standards as being a “playbook” for schools to adapt and modify as necessary. The applicant was not able to state how the Standards will be modified to meet the specific needs of Southside Ashpole. Instead, the applicant indicated that once they assess what is currently in place at Southside Ashpole, they will then be able to determine what needs to be changed in order to increase academic achievement. However, in the negotiations response, the applicant indicated that “…through our Discovery Process, we will also be determining where the most prominent needs for support are.” During the negotiations meeting, the applicant presented artifacts from its Discovery Process, which laid out a process the applicant will follow to assess how the school currently is operating in relation to its Select Standards. The applicant indicated that once the Discovery Process has been completed, TRG would identify key Select Standards to implement.
• The applicant intends to hold meetings with the school community to discuss current practices at the school and work collaboratively with the existing staff to implement the Select Standards. The applicant will build on the positive school culture already in existence.
• The applicant cited two specific examples of its schools that partner with the local school districts.
• In the capacity interview, the applicant described holding various meetings with local stakeholders, attending local events, and speaking to community members in an effort to engage the local community.
• In the application and during the capacity interview, the applicant recognized the work previously done at its school in North Carolina to build its identity. The entity indicated it will support those areas that are working at Southside Ashpole, and adjust other areas of concern, as necessary, to ensure the best overall result.
• In both the application and during the capacity interview, the applicant indicated that it intends to utilize its network, particularly the school in North Carolina, to support this school.

Summary of Concerns

- No specific concerns are noted at this time.

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Record of Results

Applicants must have a record of results in improving performance of persistently low-performing schools or improving performance of a substantial number of underperforming students with a school or schools operated by the organization in this State or other States. The applicant may also have a credible and specific plan for dramatically improving student achievement in a low-performing school and provides evidence that the applicant, or a contractual affiliate of such an entity, is either currently operating a school or schools in this State that provide students a sound, basic education or demonstrating consistent and substantial growth toward providing a sound, basic education in the prior three school years.

The applicant:
- Describes its prior experience in assuming the operations of or turning around an underperforming school based on its record of results;
- Describes its results in serving students with similar demographics of the school(s) it is interested in serving.
- Includes, as Attachment 1, a table that lists the following:
  - Names of all schools currently being operated or operated within the past five years by the organization in this State or any other State, regardless of current operational status
  - The city and State the schools are located
  - The length of time involved in operations of the school(s) (e.g., 1 year, 2 years)
  - Basic demographic information for the school including race/ethnic diversity, poverty levels, special education, and English language learners
  - A summary of the academic outcomes/data showing the results achieved by the school(s) in the applicant’s network or under the organization’s operation for each year (up to the most recent five years) the school was operated by the organization to include data on
    - Academic growth in reading and mathematics
    - Grade-level proficiency in reading and mathematics
    - Attendance data
    - Discipline data
  - Third-party evaluations of the applicant’s outcomes (optional)

Summary of Strengths

- In the application, the applicant cited its experience starting schools in underperforming districts. Additionally, during the capacity interview, the applicant described its work at St. Clair County Intervention and Trillium Academy as two schools that TRG has taken over, as opposed to starting new. St. Clair County Intervention had less than 30 students participate in the assessment; thus, data were not available (see the table below). Additionally, during the capacity interview, the applicant described its lessons learned from starting and taking over schools; the applicant indicated that TRG Select Standards are a result of reflecting on lessons learned.
- The applicant described its results serving students with similar demographics (Merritt Academy, Madison Academy, and Hanley Academy).
- The applicant provided a summary of academic outcomes, as requested above.

Summary of Concerns

- Per Table 1 below, the applicant has a mixed record of results in improving performance of persistently low-performing schools or improving performance of a substantial number of underperforming students with a school or schools operated by TRG. Some schools, such as The New Standard Academy, had approximately 45% of students pass the English language arts (ELA) assessment and 32.5% pass the math assessment. Merritt Academy is the only TRG school that had
75% of more of its students pass both the ELA and math assessments. Trillium Academy had 75% of its students pass the ELA assessment, but approximately 53% pass the math assessment.

Further, in a letter submitted to Mr. Dave Machado, the Director of Office of Charter Schools (and addressed at the February 28, 2018 State Board of Education meeting), the Board formally requested an amendment to its charter. The Board is seeking to postpone the opening of its high school due to “...our lack of satisfaction in the area of assessment performance.” The Board president noted, “While we have continued to show growth in EVAAS, as well as in our self-adaptive growth assessments, we have not earned satisfactory achievement scores or School Performance Grades.” This letter acknowledges the mixed record of results of TRG, particularly in the state of North Carolina.

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## Mission & Vision

The mission statement defines the organization’s purpose and primary objectives, describing why it exists. The mission statement provides the foundation for the entire proposal.

The applicant:
- States the mission of the proposed ISD school in thirty-five words or less.
- Clearly describes the mission of the proposed school and how that mission will inform the school’s daily activities and students’ classroom experience.

### Summary of Strengths
- The applicant cited both the mission and vision of Southside Ashpole Elementary School.

### Summary of Concerns
- The applicant stated that the mission will inform every aspect of school planning, including resources, curriculum, and scheduling. However, the applicant did not describe how this will occur.

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Goals
The application should demonstrate clear and specific goals for the first 5 years of operation outlining expectations for the proposed school’s academics, school climate, and operations. Applicants should clearly outline the process in which the organization will measure the successes and failures of the Innovative School.

The applicant:
- Provides specific and measurable goals for the proposed school for the 5 years of operation, outlining expectations for the proposed school’s academics, school climate, and operations. Address how often, who, and when the information will be communicated to the ISD Superintendent and other stakeholders.
- Describes the mechanisms by which the fundamental features described in the previous question will dramatically influence student success. The applicant provides evidence from its experience and/or valid research.
- Describes how it will drive growth among students at all achievement levels, while also accelerating the achievement of those who are most behind.

Summary of Strengths
- The applicant provided some evidence demonstrating the organization’s experience, as well as research that supported the creation of its goals.
- The applicant intends to use TRG’s Select Standards that are rooted in three areas – effective implementation strategies, effective classroom management strategies, and effective classroom instructional design – to drive growth among students. Further, the applicant will implement a Multi-Tiered Systems of Support (MTSS) program to remediate and enrich students. Students will have individual student plans with clear learning goals for each student. TRG Select Standards were not stated in the application. Although the capacity interview allowed the applicant an opportunity to provide additional information on the Standards, it remained unclear as to how the Standards themselves will drive growth among students at all achievement levels, while also accelerating the achievement of those who are most behind. During the negotiations meeting, the applicant spoke about how it will drive growth among all students at all achievement levels, particularly through its MTSS program and double block of intervention.

Summary of Concerns
- The applicant listed five main goals, with objectives for each goal. Each goal and objective are measured by academic proficiency and growth goals, which was explained during the capacity interview. The goals include academics, school climate, and operations. All goals will be measured by proficiency and growth goals (in addition to surveys, participation data, etc.), reported by administration or a designee to interested stakeholders, and will occur three times per year by request. While these goals are present, the proficiency and growth goals are the only goals with specific metrics, and the operations goals do not include items such as facilities or finance. In the negotiations documents, the applicant submitted an updated goals document; however, the revisions do not provide greater clarity.

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### Instructional Program

The application articulates the educational plan that the applicant intends to implement and does so in a manner that indicates that the applicant is knowledgeable and competent to develop an educational plan that will succeed in not only producing excellent instructional practice but continual growth in student achievement. The education plans align with the mission of the innovative school and the philosophy regarding instructional practices under which the school will operate. The plan includes information on what curriculum and/or staff training will be implemented to accomplish this goal.

The applicant:

- Provides a detailed description of the overall education plan of the proposed innovative school, including major instructional methods, assessment strategies, and explains how this instructional program and model meet the needs of the targeted student population.
- Describes the basic learning environment (e.g., classroom-based, independent study), including class size and structure for each grade.
- Provides a synopsis of the planned curriculum in Attachment 2, including one sample curriculum outline (in graph form) in the attachment for one core subject (specific to the school's purpose) for each grade the school would serve.
- Identifies how this curriculum aligns with the proposed school's mission, targeted student population, and North Carolina state standards.
- Describes the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population.
- Describes how teachers and other team members will be trained and coached.
- Explains how the proposed instructional plan will ensure student readiness to transition from grade-to-grade and to the next grade span upon completion.
- Describes how the applicant will personalize learning for each student in the school.
- Describes the structure of the school day, week, and year, including the number of instructional minutes/hours in a day for core subjects such as language arts, mathematics, science, and social studies. The applicant notes the length of the school day, including start and dismissal times, and explains why the school’s daily and weekly schedule will be optimal for the school model and for student learning. In addition, the applicant provides the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade.

### Summary of Strengths

- While the applicant included a sample curriculum outline for ELA for each grade the school would serve, the applicant did not provide a synopsis of the planned curriculum in its original submission. During the negotiations meeting, the applicant presented its curriculum, including the Pacing Guides and Lesson Plan Creator, and demonstrated how the curriculum is aligned to North Carolina State Standards and Common Core State Standards.
- In the application and during the capacity interview, the applicant indicated that it intends to implement the following instructional strategies: strategies described in *Teach Like a Champion*; strategies described in the Charlotte Danielson Framework; MTSS strategies (remediation blocks, push-in services, etc.); Fluency-Oriented Reading Instruction; Text structure instruction/Transactional Strategies; and self-regulated strategy development. The applicant indicated these strategies have been effective in their schools and have been based on research-based practices.
- While the application did not describe its professional development program, the applicant spoke to its professional development program during the capacity interview, including pre-service
training on items such as *Teach Like a Champion* and TRG systems, among others. The applicant also indicated that teachers would be observed, that they would participate in professional learning communities, and that they would participate in regularly-scheduled professional development sessions. Further, the applicant described its intention to utilize the Charlotte Danielson Framework as a method of evaluation and feedback to teachers. Finally, the applicant indicated that each teacher would have a personalized professional development plan.

- While the applicant provided a high-level summary of their two-fold system of support (a scaffolded/spiraled framework and pacing guides), the applicant did not describe how this would ensure student readiness to transition to the next grade in its original submission or the capacity interview. However, during the negotiations meeting, the applicant described how each student would have individual student learning plans that identify areas of growth for students. The applicant indicated that during the intervention blocks of the day (2 blocks of 30 minutes in both math and ELA), students would work toward the skills identified on their personalized plan.

- The applicant indicated that TRG Select Standards support individual students through assessment monitoring and creating individual student plans. But beyond this, information was not provided in the original submission or the capacity interview that indicated how the applicant would personalize learning for each student in the school. However, during the negotiations meeting, the applicant described how each student would have individual student learning plans that identify areas of growth for students. The applicant indicated that during the intervention blocks of the day (2 blocks of 30 minutes in both math and ELA), students would work toward the skills identified on their personalized plan.

- In the original submission and the capacity interview, the applicant did not state why the school’s daily and weekly schedule would be optimal for the school model and for student learning, beyond indicating that offering 90 minutes of both math and ELA instruction “...has proved itself through research both inside and outside of TRG schools.” In the negotiations document, however, the applicant reiterated that daily schedules have been derived from research inside and outside of TRG schools. The applicant noted that having 90 minutes for both reading and math increased academic achievement (according to research conducted by Fielding, Kerr, or Rosier). During the negotiations meeting, the applicant presented sample daily schedules, which include an intervention block designed to target students’ learning.

- The applicant will have approximately 20 students in a classroom-based setting. The applicant will use whole group and small group instructional practices.

- A review of the applicant’s proposed budget indicated that assumptions related to teacher salaries were unclear and that some essential positions, such as the guidance counselor, may not have been allocated sufficient funding to attract highly qualified personnel. Following the negotiations meetings, the applicant submitted a revised budget, which presented teacher salary assumptions and increased the guidance counselor salary over time.

### Summary of Concerns

- In the application and during the capacity interview, the applicant provided some information about its overall education plan, but the response was lacking in detail and it was unclear what the actual plan is or how the articulated components come together to form a cohesive educational program. The applicant also did not describe why the model is appropriate for the targeted student population. During the negotiations meeting, the applicant presented its Lesson Plan Creator and explained how teachers create lesson plans at TRG schools, as well as how leadership can monitor the creation and impact of lesson plans. However, outside of curriculum, the applicant did not specifically address why the model, as a whole, is appropriate for the targeted population.
During the capacity interview, the applicant indicated that their curriculum is a set of standards that are paced. The applicant further noted that schools and teachers have flexibility in the standards to identify resources that best teach the standards. For instance, several of TRG’s schools use Envision Math, Math in Focus, and Reading Street. In the negotiations documents and during the negotiations meeting, the applicant indicated how the curriculum will align with the North Carolina State Standards. However, at no point during the evaluation period did the applicant sufficiently describe how it will align with the school’s mission or the targeted student population.

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Special Programs and Students At Risk

The education plan must include information on the plan for teaching students who are “At-Risk” of underachievement, students who are English learners and exceptional children. Federal and State laws do not allow schools funded with public dollars to exclude anyone based upon exceptionalities.

The applicant:
- Explains the extent to which the organization has the capacity and experience working to achieve high academic outcomes for students with disabilities, including students with mild, moderate, and severe disabilities and students protected under Section 504 of the Rehabilitation Act.
- Describes the methods and support systems it will use to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE) and that the school will be in compliance with federal and state regulations.
- If the school operator, in consultation with the ISD Superintendent, wishes to enter into a Memoranda of Understanding for Alternate Arrangements with the local school district for services for children with disabilities, the application describes the plan for providing these services.
- Explains the extent to which the applicant has the capacity and experience working to achieve high academic outcomes of English learners.
- Explains the extent to which the applicant has the capacity and experience in working to ensure positive academic outcomes for students at-risk of underachievement.
- Explains how the applicant will ensure the social-emotional needs of students are met.
- Describes how the needs of students will be met through wrap-around services (e.g., mental health partnering agencies, student basic needs services).

Summary of Strengths

- The applicant did not adequately state the extent to which the organization has the capacity and experience working to achieve high academic outcomes for students with disabilities in the original application; however, during the capacity interview, the applicant explained that two members of the leadership team have specific expertise in special education.
- The applicant discussed how it will ensure compliance with Federal and State regulations but did not describe about how it will ensure students with disabilities receive a Free and Appropriate Public Education in its original submission and the capacity interview. In the negotiations documents, the applicant described how it will provide services to students with disabilities by two certified Exceptional Children teachers and will ensure students have access to the general education content while also being given time for individual support based on identified needs.
- The applicant intends to provide general Exceptional Children (EC) services and contract specialized services (such as psychologist, speech and language, etc.).
- The applicant indicated that one of its schools, Hanley International Academy, has had success with English learners by stating, “It has moved from its baseline 20 on Michigan’s Top-to-Bottom school performance list to 54.” It was unclear in the original submission and during the capacity interview how this demonstrates success with English learners in particular. However, in the negotiations documents, the applicant submitted comparison data between Hanley International, the local school district, and the State of Michigan. According to the data, the school had nearly 50% of its English language learner students achieving above-average growth on the WIDA, compared to approximately 30% at both the district and State levels. Hanley International Academy achieved approximately the same percentage of students achieving average growth but also had
approximately 12% of students achieving below-average growth, compared to approximately 30% at both the district and State level achieving below-average growth on the WIDA.

- The applicant did not describe the extent to which TRG has capacity and experience working to ensure positive academic outcomes for students at-risk of underachievement in its original submission. During the capacity interview, the applicant described its work, at a very high-level, at St. Clair Intervention Academy, as well as the MTSS process. But the response lacked detail and was not specific. In the negotiations documents, however, the applicant provided information regarding its experience working with at-risk students. The applicant noted that Hanley International Academy scored in the 54th percentile of schools on Michigan’s Top to Bottom List compared to Detroit School District who scores in the 7th percentile on that same list. During the negotiations meetings, the applicant described its MTSS process, which would include two 30-minute periods in both math and ELA where students would receive instruction in small groups working on specific skills identified on NWEA. The applicant described how teachers would utilize Illuminate to create pre and post-tests to ensure mastery. The applicant also indicated the groups would be dynamic in an effort to assist as many students as possible.

- During the capacity interview, the applicant described how the needs of students will be met through wrap-around services and provided information about how TRG has done this at one of its schools, Capital Encore Community, as an example.

### Summary of Concerns

- The applicant did not address how it will ensure the social-emotional needs of students beyond stating that it will ensure a safe and nurturing culture and provide support personnel who are trained to deal with stress and trauma. In the negotiations documents, the applicant cited a full-time guidance counselor, as well as a licensed social worker, will provide services to students. Beyond this, it is not yet clear how the school will ensure that the social-emotional needs of students are met.

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Achieving Measurable Results

The responses in this section include clear and measurable educational goals and objectives that set high standards for student performance for each grade level. These goals should expound upon the overall academic goal in the Goals section of the application. The applicant provides evidence that the evaluation tool(s) or assessment(s) will result in assessment data that will drive instruction and improve the curriculum over time for the benefit of students. Finally, the section ends with a list of developed clear policies and standards for promotion from one grade level to the next along with exit standards for ALL students.

The applicant:

• Describes any mission-specific academic goals and targets that the school will have for the five-year contracted period, and states goals clearly in terms of the measures or assessments the applicant plans to use and describes the process by which it will determine and set targets. (The innovative school will be required to participate in all State-mandated assessments.)

• Outlines the clearly measurable annual performance and growth goals that the school will set in order to meet or exceed state expectations for student academic growth. Also:
  o Describes the presumed baseline and explains how it was set.
  o Articulates how the applicant will measure and evaluate academic progress – of individual students, student cohorts, sub-groups, and the entire school – throughout the school year, and at the end of each academic year.

• In addition to mandatory State testing, identifies the primary interim academic assessments the school will use to assess student-learning needs and ensure progress towards State proficiency targets and describe how they will be used.
  o Explains the use of any evaluation tool or assessment that the school will use in addition to any State- or Federally-mandated tests. Describes how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.
  o Describes how the applicant will support teachers in developing embedded assessments and checks for understanding in order to ensure that instruction meets student needs.
  o Explains how the applicant will know that the proposed interim assessments are valid and reliable indicators of progress and explains how these interim assessments align with the school’s curriculum, performance goals for the school, and state standards.
  o Describes the corrective actions the school will take if it falls short of student academic achievement expectations or goals at the school-wide and classroom levels and explains what would trigger such corrective actions and who would be responsible for implementing them.
  o Articulates how interim assessments will be used to inform instruction, and how teachers and school leaders will be trained in their use.
  o Identifies specific interim performance goals and assessments that the applicant will use to confirm that the school is on-track to meet ambitious academic goals throughout the school’s first year with students.

• Describes the process for collecting and storing data, including the information system(s) used.

Summary of Strengths

• The applicant cited both proficiency and growth goals using Northwest Evaluation Association (NWEA) and end-of-grade (EOG) assessments.

• The applicant indicated that the initial year will require learning and in subsequent years, “percentage goal increases will be guided by baseline data,” but the applicant also indicated that
percentages were “...determined based on experience and historical trends from current and previous TRG schools implementing new assessment systems.”

- In its original submission, the applicant stated that the school would review data, but it was unclear how the applicant would measure and evaluate academic progress, including the frequency, and at each level of the school (individual students, cohorts, sub-groups, etc.). During the capacity interview, the applicant did indicate that data days would occur three times per year, but specifics beyond this were not offered. During the negotiations meeting, however, the applicant presented its online tool used by schools and TRG leadership to identify standards met on various assessments (including teacher-developed assessments). The applicant also demonstrated how the school or TRG leadership can view lesson plans to assess the strength of the lesson for that standard to potentially determine root causes for lack of student mastery. The applicant described how the school would have 30-day assessments, which have been developed by TRG teachers, that are aligned to the standards and TRG’s pacing guides.

- In the application and during the capacity interview, the applicant indicated that the interim assessments will be NWEA Measures of Academic Performance (MAP) (administered three times per year) or iReady and TRG assessments. But the applicant provided very little information about how the assessments would be used by teachers other than stating that teachers would utilize TRG assessments to re-teach during intervention. However, during the negotiations meeting, the applicant explained how teachers, school leaders, and TRG leadership would use results from the TRG assessments and the NWEA MAP assessments to group students for the MTSS periods and to personalize learning.

- The applicant indicated that the school will have interim standardized assessments (i.e., common curriculum assessments). No information was provided in the original submission or during the capacity interview that spoke to how teachers will use the data, other than stating “...teachers and intervention staff review the data and implement remediation as necessary.” However, during the negotiations meeting, the applicant explained how teachers would use results from the TRG assessments and the NWEA MAP assessments to group students for the MTSS periods and to personalize learning. The applicant also indicated that teachers and/or TRG will use results from the various assessments to modify curriculum to ensure student mastery.

- In its original submission and the capacity interview, the applicant indicated it will ensure teachers are provided training for the assessment systems but did not indicate when or how this training will be provided. In the negotiations documents, the applicant indicated teachers would participate in three weeks of training prior to the start of the school year (one week per month in June, July, and August). During the negotiations meeting, the applicant noted that this could be revised based on the contract with the ISD and the ability to train teachers during the summer. The professional development plan presented in the negotiations documents noted that teachers would receive training on MAP, EOG/BOG assessments, Student Data, among others during the summer PD. In the negotiations documents, the applicant noted that follow up training would also be provided by TRG leadership and on-site staff following the summer PD.

- In the application and during the capacity interview, the applicant did not state, in concrete terms, how the school will use interim assessment to inform instruction. Further, little information was provided regarding how teachers and school leaders will be trained in their use. During the negotiations meeting, however, the applicant described how interim assessments would inform instruction, including re-teach and the intervention blocks.

- The applicant indicated that it will use PowerSchool and Illuminate (a dual-purpose system that helps the school create and store TRG Common Assessments). But it did not describe the process for collecting and storing the data, or how the information system will actually be used. During the
negotiations phase, the applicant presented its platform where lesson plans and assessments, along with the results of the assessments, were stored.

### Summary of Concerns

- The applicant does not appear to have any mission-specific academic goals and targets. Instead, the applicant presented the table that contained goals previously articulated in Record of Results. In this section, however, the applicant provided a second table with academic targets.

- While the applicant described how TRG Common Assessments are created, aligned to the curriculum, and utilized (and thus valid and reliable indicators of progress), the applicant did not indicate how its proposed interim assessments (NWEA MAP) align with the school’s curriculum. The applicant’s response during the negotiations phase did not provide sufficient specificity to identify this as an area of strength.

- The applicant indicated that data are monitored on several levels and that TRG uses a team approach to determine when and what problems are present. But the applicant did not indicate the actions the school would take if it falls short of student academic achievement expectations or what would trigger such corrective actions and who would be responsible for implementing them. The applicant’s response during the negotiations phase did not provide sufficient specificity to identify this as an area of strength.

- The applicant did not provide interim performance goals and, instead, referred back to the academic goals listed previously in this section. The applicant’s response during the negotiations phase did not provide sufficient specificity to identify this as an area of strength.

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### School Culture

The applicant:

- Describes the characteristic spirit of the proposed school and explains how it will promote a positive academic environment and reinforce student intellectual and social development.
- During the startup phase, describes how it will integrate parent and community input into the plan for developing a positive school culture, and articulates specific initiatives and/or strategies it will implement to learn from and engage the neighborhood and community.
- Describes how it will develop and establish this culture for the various stakeholders, including students, teachers, administrators, and parents starting from the first day of school.
- Discusses its approach to reinforcing positive student behavior and ensuring that all students remain on track to achieve the academic and social objectives set out in the mission of your school.
- Describes its plans for the school to align staff and students around high expectations for student behavior.
- Explains how it will measure school culture and evaluate implementation of your culture plan, including how parent and student feedback will be incorporated in measuring the school’s success in creating a positive culture.
- Describes the school’s approach to help support all students’ social and emotional needs, and details the identification strategy, interventions, and remediation to be implemented. The applicant cites the research/rationale for the selected methods, including how it will measure the success of its social and emotional remediation efforts and how it will communicate the need for remediation to parents and invest them in supports.
- Describes its goal for student attendance and explains how it will ensure high rates of student attendance as well as what supports will be in place to reduce truancy and chronic absenteeism.

### Summary of Strengths

- In both the application and during the capacity interview, the applicant described holding community meetings to learn from, and engage, the neighborhood and community.
- In both the application and during the capacity interview, the applicant stated it will implement PBIS and *Teach Like a Champion* strategies, but the applicant did not describe how or what this will look like. During the negotiations meeting, the applicant described *Teach Like a Champion* strategies, such as “thresholding” (greeting students at the door), and how this will be used to set the stage as students enter the room. The applicant also indicated that staff members from Southside Ashpole would attend *Teach Like a Champion* training, which is done as “train the trainer.” The trainers would then come back and provide training to the rest of the school staff. The applicant described how these strategies would be emphasized during professional learning communities based on the identified needs of the teachers.

### Summary of Concerns

- The applicant did not describe the characteristic spirit of the school. During the capacity interview, the applicant indicated that it will employ *Teach Like a Champion* strategies to ensure an environment free of disruptions. During the negotiations meeting, the applicant described the school as having a welcoming environment and a unified team and community. For example, the applicant described teachers meeting students at their doors and greeting them as they enter the classroom, but it was unclear how the school would motivate and engage students in achieving the school’s mission and vision.
• The applicant did not state how it will develop and establish culture for various stakeholders beyond indicating it will keep what is currently in place (Positive Behavioral Intervention and Supports [PBIS] and community support) and a recognition program. During the capacity interview, the applicant acknowledged that the budget currently does not have individuals dedicated to culture but noted that the budget has flexibility if necessary.

• The applicant indicated it will use *Teach Like a Champion* and The Charlotte Danielson Framework, but beyond this, it did not describe plans for aligning staff and students around high expectations for student behavior.

• The applicant intends to utilize stakeholder surveys and claims it will be open to feedback. However, the applicant did not explain how it will measure school culture and evaluate the implementation of the culture plan.

• The applicant indicated it will meet students’ social and emotional needs through the PBIS and MTSS processes and will utilize TRG Student Support Profiles to determine programming (including peer and adult mentoring, restorative practices, anger management). However, the applicant did not fully present a plan and how this will happen in day-to-day operations. Further, the applicant provided a list of “resources utilized in our research and development of strategies to support students’ academic, social, and emotional growth,” but most of the resources were not related to social and emotional programming.

• The applicant did not describe a goal for student attendance. The applicant indicated that “…the driving force in good attendance is for students to want to come to school.” The applicant did not describe how it will ensure high rates of student attendance or supports that will be put in place to reduce truancy and chronic absenteeism.

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Operations Plan

Startup Planning

The school operator will be responsible for funding the startup period prior to July 1, 2018. The applicant must show that it will be able to support the opening of the school prior to State and local funds being available.

The applicant:

- Provides a detailed startup plan, as well as specific organizational goals for the planning year (SY 2017-2018) to ensure that the school is ready for a successful launch in Fall 2017. The applicant outlines key activities, responsible parties, and milestones submitted as Attachment 3.
- Explains who will work on a full-time or nearly full-time basis immediately following assignment of a location to lead development of the school(s) and the plan to compensate these individuals. In addition, the applicant explains the ability of the organization to fund any additional expenses related to the opening of the school prior to availability of funds before July 2018.
- The applicant lists any State Board of Education rules, regulations, policies, and procedures, or the provisions of the statute for innovative schools you potentially foresee submitting to the ISD Superintendent to request a waiver from the State Board of Education.

Summary of Strengths

- The applicant indicated the entire management team will be engaged in the development of the project and will be compensated through either the school’s budget or the management team’s budget. During the capacity interview, the applicant explained that existing staff from its North Carolina school (2-to-3 individuals), as well as TRG leadership, will be on site regularly at the school, approximately 3-to-4 days per week.
- The applicant did not request waivers.

Summary of Concerns

- The applicant did not provide a detailed startup plan in its original submission. Further, in this section, the applicant re-stated its goals that were stated in several places throughout the application (e.g., G1: Southside Ashpole Elementary School will consistently implement proven research-based best practices to design classroom instruction to focus on mastery of learning targets for all students). The goals listed, however, are not related to startup. Additionally, the goals do not state how it will ensure the school is ready for a successful launch. In the negotiations documents, the applicant presented a start-up plan; however, the plan outlined categories of topics as opposed to a detailed action plan.

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The applicant provides a quote for insurance and:

- Has named the State Board of Education and the Innovative School District as an Additional Named Insured to their liability coverage for operation of an Innovative School while obtaining and maintaining insurance at a minimum in the following amounts:
  - Errors and Omissions: one million dollars ($1,000,000) per occurrence;
  - General Liability: one million dollars ($1,000,000) per occurrence;
  - Property Insurance: for owned building and contents, including boiler and machinery coverage, if owned;
  - Crime Coverage: no less than two hundred fifty thousand dollars ($250,000) to cover employee theft and dishonesty;
  - Automobile liability: one million dollars ($1,000,000) per occurrence; and
  - Workers' compensation: as specified by Chapter 97 of General Statutes, Workers' Compensation Law.
- Has attached a copy of the quote with projected costs as Attachment 4.

Summary of Concerns:

- The applicant did not provide a professional quote that indicates an agency of insurance.
- The applicant did not list all of the required insurance coverage (e.g., property insurance).

### Summary of Strengths

- No specific strengths are noted at this time.

### Summary of Concerns

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Résumés

The scope of work to operate an innovative school requires a team of staff. School operators should have a team with the necessary personnel and expertise to manage and develop a plan for successfully operating a school. The applicant must provide information as to the qualifications and experience of key members of the organization.

In Attachment 5, the applicant provides résumés of all key stakeholders responsible for operating the innovative school either in the startup or operation phases.

Summary of Strengths

- The applicant provided résumés for key stakeholders responsible for operating the innovative school.

Summary of Concerns

- No specific concerns are noted at this time.

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Background Check: Notable Findings

Background checks and a due diligence review of individuals associated with this application did not reveal any concerns of a criminal nature.