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|  **final application REVIEW 2017-2018** |
| **Proposed School Name (Commonwealth):** | Phoenix Academy Public Charter High School, Lawrence |
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| **Grades Served At Full Capacity:** | 9-12 |
| **Number of Students At Full Capacity:** | 250 |
| **Proposed School Location:** | Lawrence |
| **Proposed Sending Districts:** | Lawrence, Haverhill, and Methuen |
| **Proposed Opening Year:** | 2018-2019 |
| **Mission Statement:**Phoenix Academy Public Charter High School, Lawrence challenges resilient, disconnected students with rigorous academics and relentless supports, so they take ownership of their futures and succeed in high school, college, and as self-sufficient adults.**Proposed Growth Plan for First Five Years of Operation:**

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| **School Year** | **Grade Levels** | **Total Student Enrollment** |
| First Year | 9, 10, 11, 12 | 175 |
| Second Year | 9, 10, 11, 12 | 200 |
| Third Year | 9, 10, 11, 12 | 225 |
| Fourth Year | 9, 10, 11, 12 | 250 |
| Fifth Year | 9, 10, 11, 12 | 250 |

The Department has compiled a summary of the evidence identified through the review of the charter application, the responses provided by the applicant group during the subsequent interview, and the testimony and comment provided at the public hearing and during the public comment period. The summary below describes the evidence identified that addresses the application criteria and identifies the areas of the application criteria where limited evidence was provided during the application process.**Notes:** The applicant group is the board of trustees of two regional Commonwealth charter schools which comprise the Phoenix Academy Public Charter High School network. Phoenix Academy Public Charter High School, Chelsea opened in 2007 serving students from Chelsea, Everett, Lynn and Revere. Phoenix Academy Public Charter High School, Springfield opened in 2014 serving students from Chicopee, Holyoke, and Springfield. The Phoenix Foundation, a non-profit organization affiliated with the Phoenix Academy Public Charter High School network, entered into an agreement with Lawrence Public Schools to replicate the Phoenix model and operate an in-district high school called Phoenix Academy Lawrence beginning in 2012. Phoenix Academy Lawrence will cease operations if the proposed regional Commonwealth charter school is chartered.**Public Comment:**The application received testimony and written comment **in support** during the public hearing and public comment process. At the public hearing, 33 individuals spoke in support of the proposed school, including Superintendent Jeffrey C. Riley of Lawrence Public Schools, Phoenix Academy Lawrence students, alumni, staff members, and parents, community members, Massachusetts Charter Public School Association Executive Director Tim Nicolette, and three members of the applicant group. The Department received written comment in support from State Representative Juana Matias and Haverhill Alternative School Principal John DePolo. The application also contained letters of support from Superintendent Riley, Superintendent James F. Scully of Haverhill Public Schools, Mayor James J. Fiorentini of the City of Haverhill, and President Lane A. Glenn of Northern Essex Community College. In addition, the application contained 8 letters of support from organizations that propose to collaborate or support the proposed charter school. The organizations include Everett Mills Real Estate, LLC., the Community Group, Rumbo, Lahey Health Behavioral Services, Massachusetts Alliance on Teen Pregnancy, UTEC, YouForward, and Springpoint.The application did not receive testimony or written comment **in opposition** during the public hearing and public comment process.  |

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| **Mission (I.A.) and Key Design Elements (I.B.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The mission speaks to the value of the school as an institution that will facilitate positive outcomes for students who otherwise might not succeed. The mission defines the purpose of the school as providing at-risk students with a program that will prepare them for success in college and in life. (I.A.)
* The mission is reflected throughout all sections of the application. (I.A.)
* The application briefly describes the educational philosophy of the applicant group and their core beliefs and values about education. The applicant group believes that all students have the potential to succeed in school. (I.B.)
* The application identifies and describes four key design elements: serve disconnected youth using a high-risk student population definition; relentless supports; rigorous academic instruction through use of data and professional development; and preparing students for college success. The application indicates that the proposed key design elements are the same as the key design elements of existing schools in the Phoenix network. (I.B.)
* The key design elements are clearly incorporated into the mission and are reflected throughout all sections of the application. (I.A., I.B.)
* The application explicitly references key pieces of evidence to demonstrate how the school will measure progress in implementing each of the four key design elements. (I.B.)
 | * No primary concerns noted. (I.B.)
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| **Description of the Community to Be Served and Enrollment and Recruitment (I.C. and I.D.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application describes the at-risk student population in the Lawrence, Haverhill, and Methuen communities, and describes how the educational option provided by the school will address the needs of the student population. The application states that students will be held to high expectations, that students will be supported through positive relationships with staff, and that the program will be responsive to the communities in which it is located. (I.C.)
* The applicant group has a successful collaboration with the Lawrence Public School district. (See note on page 1.) The district is supportive of the proposed regional Commonwealth charter school and will continue to work collaboratively with the applicant group. The application states that a Commonwealth charter is necessary in order for the school to serve students in the greater Lawrence region, including older students. Phoenix network staff and staff at the current in-district Phoenix school in Lawrence are in the process of building relationships with school officials and community organizations in Haverhill and Methuen. (I.C.)
* The application describes the challenges of assessing parental support for the proposed school and explains how the applicant group is seeking to assess parental support indirectly, through conversations with community organizations, school principals, and families of current students, some of whom previously lived in Haverhill and Methuen. (I.C.)
* The application includes detailed plans for how the school will publicize and market its program, including plans for helping students currently enrolled in the school to enroll in the proposed school. (I.C.)
* The application describes the school's plans to involve family members/adult supporters in substantive ways in their students' schooling experience and summarizes the important role community organizations play in recruiting students and/or extending students' educational opportunities. (I.C.)
* The application discusses specific ways in which the school will continue collaborating with the Lawrence district, including working with the district to identify potential students for the proposed school and sharing best practices with the district. The applicant group hopes to collaborate with Haverhill and Methuen in similar ways. (I.C.)
* The school intends to enroll 175 students in Year 1 and to add approximately 25 students per year through Year 4, when the school will reach a maximum enrollment of 250. During the interview, the Phoenix Academy Lawrence school leader reported that the school currently has 120 students and that a target enrollment of 175 in Year 1 is anticipated to enable the school to continue serving all of its current students in addition to serving additional students from the three sending districts. The application states that the rationale for a maximum enrollment of 250 is that students are more likely to feel supported in a smaller school. The school plans to offer multiple opportunities during the year for students to enroll, in order to better accommodate the anticipated student population in accordance with practices at other Phoenix Academy charter schools. (I.D.)
* The application states that the school will admit students in grades 9-12 and up to age 21 in accordance with practices at other Phoenix Academy charter schools. (I.D.)
 | * No primary concerns noted.
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| **Overview of Program Delivery and Curriculum and Instruction (II.A. and II.B.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application states that the core elements of the proposed school's model will include a student-centered, mastery-based approach that uses a combination of personalized strategies, including blended learning. The model is intended to ensure college and career readiness for the anticipated student population, including English learners, students with disabilities, students at risk of not graduating, and students who previously dropped out or were expelled. Aspects of the model are being piloted at all three Phoenix schools during the current 2017-2018 school year. (II.A.)
* The proposed school schedule includes 190 days, and the application states that the school will operate for no fewer than 185 days. The school day will begin at 9 a.m., and will end at 4 p.m. on Monday through Thursday and at 1:05 p.m. on Friday. (II.A.)
* The application includes a sample weekly schedule. Monday through Thursday, the day is organized into three 90-minute instruction periods, lunch, an advisory period, and an independent study period. The Friday schedule includes six abbreviated instruction periods and a community meeting. (II.A.)
* The application states that the school anticipates offering optional tutoring before and after school and during the summer in response to students' needs. (II.A.)
* The application indicates that extracurricular activities will be held during lunch and after school, and lists the following as examples: boys' and girls' basketball teams, student government, Gay-Straight Alliance, music clubs, debate clubs, art clubs, and other activities based on student interest. The application further states that the school will cultivate partnerships with community organizations willing to support students' academic, meta-cognitive, and social-emotional learning. (II.A.)
* The application states that the proposed school will implement the curriculum used by all Phoenix schools, which includes both external and internally developed materials, all stored electronically on a site accessible to staff members across the network. (II.B.)
* The Phoenix network managing director of curriculum and instruction is responsible for ensuring that all curricular materials are aligned to the Massachusetts Curriculum Frameworks (MCF). At the proposed school, the director of curriculum and the school leader will review teachers' plans to ensure alignment with the standards. Network and school leaders will also support the implementation of the curriculum through weekly observations and supervision meetings. (II.B.)
* The application includes the curriculum scope and sequence that will be used by the school. Materials provided are clearly aligned with the MCF. (II.B.)
* The application describes processes for the ongoing development, improvement, and refinement of the curriculum. These processes involve both network and school-based staff. Analysis of student performance is used to inform more significant revisions during the summer and to make adjustments throughout the school year. (II.B.)
* The Phoenix network is in the process of transitioning from a credit accumulation system to a competency-based system and has contracted reDesign (an education consulting firm) to write the competencies aligned with MCF. The network's chief academic officer is overseeing this project. (II.B.)
* The application states that the learning environment will be one in which students are actively engaged in learning at their own pace. Individualized learning will be facilitated through the use of computers and online learning platforms. (II.B.)
* According to the application, school staff members will participate in professional development prior to the start of the school year. During the school year, the weekly schedule for teachers includes an hour at the end of the day Monday through Thursday and three hours Friday afternoon for collaboration and professional development. In addition, there are five days of professional development during the year devoted to content-area collaboration. (II.B.)
* The application states that administrators will monitor the professional development needs of the staff through their observations of instruction and through quarterly surveys administered to staff. Network staff members will oversee professional development for school leaders. (II.B.)
* The application describes professional development to be provided by external organizations, including Confianza, reDesign, Pearson, Facing History and Ourselves, the Harvard Graduate School of Education, and the Center for Collaborative Education. (II.B.)
* The application states that teachers will be evaluated using the Phoenix network's teacher evaluation process. That process uses a rubric adapted from the Department's teacher evaluation rubric. The director of curriculum and instruction will conduct brief, unannounced observations on a weekly basis and will debrief those observations during supervisory meetings. Teachers will be provided with a mid-year and summative evaluation. (II.B.)
 | * The application describes a fairly traditional role for the teacher inconsistent with the proposed shifts to the educational model. The application provides a limited description of instructional strategies that will be used by teachers to meet the needs of diverse learners, including English learners and students receiving special education services. While the application states that a portion of professional development time will be used to support teachers in differentiating instruction, the plan to ensure that teachers receive adequate support to address the unique needs of all students is unclear. (II.B.)
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| **Student Performance, Assessment, and Program Evaluation (II.C.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application describes the school's policies and standards for promoting students to the next achievement level. The school will use a competency-based system currently being piloted by the network, which will enable students to progress at their own pace in different content areas. (II.C.)
* The application describes the types of internal/network-developed assessments to be used at the school. These include a minimum of two major assignments known as Quality Performance Assessments (QPAs) in each content area course. These assessments will be aligned to the competencies and will be developed and assessed using rubrics shared across the network. In addition to QPAs, the school will also administer mid-term and final exams in humanities and mathematics. These exams were developed by the Achievement Network. (II.C.)
* The application describes the school's philosophy and plans for student homework. Homework will be used to provide students with opportunities to practice skills introduced in class. (II.C.)
* The school will use multiple measures of student performance, including both internal and external assessments. External assessments such as the Massachusetts Comprehensive Assessment System (MCAS) test and STAR assessments ([Renaissance Learning](https://en.wikipedia.org/wiki/Renaissance_Learning), Inc.) will enable the school to compare the performance of its students with the performance of students at other schools, including other alternative schools. (II.C.)
* The application identifies network and school-based staff responsible for the collection and analysis of student data and describes the systems used to collect and analyze the data on an ongoing basis. (II.C.)
* The application describes systems and tools that will enable each of the following stakeholder groups to participate in the review and response to student achievement data: board of trustees, network and school administrators, teachers, students, and adult supporters. (II.C.)
 | * The application states that the school is still in the process of developing graduation requirements as part of the transition to a competency-based system. Graduation requirements will be organized in three areas: academics, personal development, and college and career readiness. (II.C.)
* The application states that the network is still in the process of developing competencies and assessment measures related to non-academic areas of focus. Non-academic areas of focus include ten priority meta-cognitive and social emotional skills: growth mindset; financial awareness and literacy; developing positive identity, self-esteem, and confidence; navigating across and within cultures; resiliency; conflict transformation skills; self-regulation of emotions, reactions, and impulses; communication skills across a variety of audiences; self-advocacy and resourcefulness in accessing help; and developing long-range goals and plans for achieving them. Other non-academic areas of focus include: technology, health and well-being, public speaking, and the development of a network of support map. The application states that competencies and assessment measures related to all of these areas will be completed prior to the school opening. (II.C.)
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| **Supports for Diverse Learners (II.D.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application states that teachers in Phoenix schools are required to obtain their structured English immersion (SEI) endorsement within the first year of teaching, and that the director of curriculum and instruction and the school leader will support teachers in meeting that requirement by helping them identify an SEI endorsement course to complete. (II.D.)
* The application includes a description of support services to be provided to students with disabilities. These include a combination of push-in and pull-out supports in core academic classes, a study skills course, and individualized instruction. (II.D.)
* The application states that the school will initially hire two teachers possessing a special education license and a third in the fourth year of operation, and that these teachers will be supervised by the network's director of English language development and special education, who has a special education license. (II.D.)
* Students in need of special education services will be identified during the intake process, when staff members will review any available paperwork related to special education services. Students who enter the school without an individualized education program (IEP) and who are later identified by staff members as potentially in need of services will be evaluated using a quarter-long process in which a team of staff members will identify and implement interventions prior to making a recommendation for a special education evaluation. (II.D.)
* The application states that the English Language Development and special education programs will be evaluated annually by the network's director of English language development and special education, who will draft a report for each program highlighting successes and areas for improvement in the coming year. The reports will draw on student assessment and indicator data and survey feedback from stakeholders. (II.D.)
 | * The application described a proposed English Language Development program which did not accurately reflect Department guidance within “Guidance on Identification, Assessment, Placement and Reclassification of English Learners.” In particular, the application did not accurately describe the identification of potential English Learners (ELs) or former ELs, the qualifications of ESL teachers, and an ESL curriculum that will guide the ESL instruction to meet the linguistic and academic needs of ELs at all proficiency and grade levels. During the interview, the applicant group indicated that this section of the application was reviewed but not developed by the network’s director of English language development and special education. During the interview, network administrators clarified that the school will hire a licensed ESL teacher, and described a range of ESL curriculum resources and processes used to ensure curriculum alignment with WIDA standards. (II.D.)
* It is unclear whether proposed English language development staffing levels (one ESL teacher for the first three years of operation) will be sufficient to provide required ESL services. The application indicates that approximately 20-25 percent of students will be English learners. During the interview, the applicant group expressed a willingness to add additional staff members as needed. (II.D.)
* The network’s capacity and the school’s capacity to oversee and support the English language development and special education programs is potentially limited by the proposed staffing model. The network’s director of English language development and special education is responsible for supervising teachers, monitoring compliance, and evaluating programs at all three network schools. (II.D.)
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| **Culture and Family Engagement (II.E.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application states that academic urgency and relentless support will be hallmarks of the school's culture. Academic urgency will be fostered in the classroom context and promoted through displays of college paraphernalia, public acknowledgement of student academic achievement, and the work of the college services coordinator. Relentless support will be informed by the relationships staff members build with students, and will be provided in classroom contexts as well as in advisory and community meetings. The student support team and social workers will monitor students' progress and will ensure each student is connected with needed support services. As described elsewhere in the application, the development of meta-cognitive and social-emotional skills will be incorporated into the curriculum and assessed through the use of non-instructional competencies. (II.E.)
* The application states that the school's student support team will connect students with services outside the school, with the school's social worker serving as the primary liaison. (II.E.)
* The application describes the school's philosophy and plans regarding student behavior and discipline. Teachers will use a system of merits and demerits in the classroom, and the school will seek to maximize student learning time by supporting teachers in successfully implementing behavior management tools. The school will employ restorative practices and will work individually with students, included students with disabilities, to create individualized plans for achieving behavior goals. (II.E.)
* The application describes ways in which the school intends to involve students' adult supporters, whether they are parents, social workers, grandparents, or other family members. The school will provide orientations for adult supporters. School staff members will frequently contact adult supporters by phone to provide updates and may conduct home visits. Adult supporters will be invited to the school for progress reports, exhibitions, and other meetings as applicable. (II.E.)
* The application describes a number of ways in which the school will gauge the satisfaction of school stakeholders. School staff members will have opportunities to provide feedback at dinners with the network chief executive officer and during weekly meetings with their supervisors. Student supporters will have opportunities to provide feedback through a parent advisory council and during one on one meetings with staff members. Students will have opportunities to provide feedback through focus groups when larger policy changes are being considered. All three groups will also be surveyed periodically. (II.E.)
* The application includes 12 letters of support, including several from community agencies and organizations pledged to support the school's educational program and serve the youth who attend the school. (II.E.)
 | * The application describes plans to have one nurse serve all three schools in the network. It is unclear how a nurse whose time is split between different schools would be able to adequately address students’ health-related needs. During the interview, the network chief executive officer, Beth Anderson, indicated interest in establishing a network level role for a full-time nurse with part-time nurses at each of the three charter schools. Ms. Anderson expressed the intent to develop local partnerships with healthcare providers to supplement the work conducted by the nurse at the network level. (II.E.)
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| **Capacity and Governance (III.A. and III.B.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application summarizes the experience and qualifications of the 12 current Phoenix board members, including the network chief executive officer. Board members have expertise in the areas of finance, fundraising and development, law, organizational development, non-profit and public governance, and management. During the interview, board members described connections they have in each of the communities served by Phoenix schools and ongoing efforts to increase the diversity of trustees to ensure varied perspectives reflective of the needs of the communities served by the network. The board reported that three candidates currently being vetted are community members. (III.A.)
* Phoenix network staff will provide oversight and/or support to the proposed school in the areas of curriculum and instruction, supports for diverse learners, operations, finance, marketing, development, and human resources. (III.A.)
* The application indicates that the proposed school will largely be staffed by current staff members at Phoenix Academy Lawrence (PAL). This includes the proposed school leader, Tamara Soraluz, who currently serves as the leader at PAL. Tamara joined the school in 2013 as a social worker and also served as the director of school culture prior to assuming her current role at the beginning of the 2017-2018 school year. The proposed director of curriculum and instruction, Rachel Aierstuck, currently serves as the director of curriculum and instruction at PAL. (III.A.)
* The application lists four organizations that are supporting the network's strategic planning (Phoenix Forward design) process: Springpoint Schools, The Bridgespan Group, the Barr Foundation, and reDesign. During the interview, members of the applicant group elaborated on the nature of the support provided by the different organizations. Board members reported that the process has benefited the Phoenix organization by providing opportunities for staff members to observe and adopt best practices from student-centered programs in other schools. (III.A.)
* The application states that the board decided to submit a charter application for the proposed school in order to extend the reach of the school to Haverhill and Methuen and serve a greater number of students. The application further states that the shift from the current partnership with the district to a Commonwealth charter is supported by the Lawrence Public School District. (III.B.)
* The application describes the board's goal of establishing college-preparatory schools serving at-risk students in gateway communities across the state. As part of the current strategic planning (Phoenix Forward design) process, the network is seeking ways of tailoring the program at each school to be responsive to the unique needs of the community. (III.B.)
* The application describes the primary anticipated challenges to achieving the board's desired outcomes. These include the challenges of retaining network leaders, providing appropriate support to school leaders, and supporting staff during the transition to the new school. The board also anticipates fundraising challenges and challenges related to the current political climate surrounding charter schools. The application expresses confidence that the board has the capacity to address identified challenges, citing the qualifications of existing board members (especially in the area of management) and describing existing board governance structures. (III.B.)
* The application cites the board's prior experience opening schools in Lawrence and Springfield as evidence of capacity to implement the proposed plan. (III.B.)
* The application states that the board will be effective in overseeing the proposed school because it has structures in place for overseeing two charter schools, and is already familiar with the current in-district school in Lawrence. (III.B.)
* The application states that the board's organizational structure and decision-making processes will remain unchanged. The application describes the work performed by three standing committees: the executive committee, the finance committee, and the development committee. The application also describes the work performed by a couple of ad hoc committees formed for specific projects in recent years: a facilities and operations committee that supported facilities planning in Chelsea and Springfield and a growth committee that explored ideas for expanding the Phoenix network. (III.B.)
* The application describes processes related to the board's oversight of the school. In addition to the work performed by committees, the full board regularly reviews dashboard data aligned with the Charter School Performance Criteria and Phoenix goals and discusses areas of concern. The board also reviews financial data at each meeting. Since 2016 the board has devoted one meeting a year to strategic planning. (III.B.)
* The application describes the systems in place to ensure clear decision making and processes that facilitate and ensure public accountability. The full board votes on the annual operational budget and any significant change to policy or strategy. The board's meeting schedule is posted, as are meeting agendas, and minutes are kept for committee meetings and meetings of the full board. (III.B.)
* According to the application, the executive committee of the board monitors individual board members' contributions to the work of the board, and the board chair communicates concerns to individual board members as needed. The application states that the executive committee of the board is developing a more formal self-evaluation process. (III.B.)
* The application describes the process by which the board of trustees develops policies and makes decisions. Board members or network staff members may propose policy changes, which are then discussed and voted on by the full board. The application provides as an example the decision to change the end of the school day from 5 p.m. to 4 p.m. The network chief executive officer reported the use of surveys of students and staff to develop a proposal which was brought to the board; board members discussed the benefits and disadvantages of the proposed change and then voted. (III.B.)
* The application describes the process for seeking input from school staff, parents, and the larger community when setting policy. In addition to the structures used at each school to gather input from various stakeholders, the board rotates meeting locations between school campuses and board members have breakfast with school staff and students to gather input informally. (III.B.)
* The application describes the recruitment and selection processes for new board members. The executive committee of the board oversees the process. The board is seeking to increase racial diversity in the composition of the board, and is working to identify a board member from the communities to be served by the school in Lawrence. The application also describes the orientation and development process for new board members. (III.B.)
* The application states that the board has been successful over the past five years in recruiting and retaining qualified and effective new board members, and lists specific current members added during that time period. (III.B.)
* The application describes succession planning for board officers and notes that two members who joined the board in 2015 are now members of the executive committee, including one who became board president. (III.B.)
 | * No primary concerns noted.
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| **Management (III.C.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application includes a school organizational chart for first year of operation and at full student enrollment beginning in the fourth year of operation. The school leader will report directly to the network's chief academic officer and will oversee the other members of the school's leadership team (a director of school culture, a director of curriculum and instruction, an operations manager, and a director of childcare center) as well as a recruitment and community engagement specialist. The structure is the same as that used at the other two Phoenix schools. The application includes a narrative that clearly explains the reporting structures among the school leader, administrators, and other staff members. (III.C.)
* The application includes a network organizational chart that encompasses the two existing schools and the proposed school, and describes the board's plan to continue managing the network through the existing organizational structure. During the interview, the network chief executive officer described the development of the network structure as “iterative” and indicated that the structure and roles will continue to shift as needed to ensure network effectiveness in supporting all three charter schools. (III.C.)
* The application describes the plan for how the school will make key organizational decisions about curriculum and instruction, student achievement, fiscal planning, and operations. (III.C.)
* As noted in the *Capacity* section, the application indicates that the proposed school will largely be staffed by current staff members at Phoenix Academy Lawrence (PAL). This includes the proposed school leader, director of curriculum and instruction, director of school support, operations manager, and director of the childcare center. During the interview, the PAL school leader reported that she is having conversations with current teachers about next year. The school will use the recommitment process used at other Phoenix schools to identify staff for the following year. The school leader reported that any open positions to replace departing staff will also pose an opportunity to prioritize the recruitment and employment of staff reflective of the school’s community. (III.C.)
* The application describes how specific network staff will support the school leader and director of curriculum and instruction during the transition to operating a charter school. During the interview, network staff further elaborated on these plans, including the goals of the various supports provided by the network staff to the school leadership team during the first year of operation as a Commonwealth charter school. (III.C.)
* The application describes how administrators will be evaluated and by whom. The evaluation process is adapted from the Department's system for educator evaluation. (III.C.)
* The application describes the plan for how the network will make key organizational decisions about curriculum and instruction, student achievement, professional development, culture, staffing, fiscal planning, and operations. The application stresses the importance of making decisions based on data and following a process for engaging relevant stakeholders. (III.C.)
* The application describes steps taken over the past few years to build the network's capacity to facilitate the work being done by staff members at each of the schools in the Phoenix network. One key step was the addition of a team of network managing directors: managing director of AmeriCorps, managing director of human capital, managing director of finance and human resources, managing director of operations and strategic initiatives, managing director of development, and managing director of curriculum and instruction. (III.C.)
* The application states that the task of ensuring that the school model is implemented with fidelity in the proposed school will be facilitated by the fact that the proposed school will largely be staffed by employees of Phoenix Academy Lawrence. (III.C.)
* The application states that the current chief executive officer of the network, Beth Anderson, will continue in that role. (III.C.)
* The application describes the school’s plan for staff recruitment, advancement, and retention. The network employs a managing director of human capital who oversees recruitment and retention strategies. The network partners with AmeriCorp, and the application states that numerous AmeriCorp volunteers have transitioned into other positions at Phoenix schools. The application states that the network is currently developing strategies for recruiting staff members from the communities served by Phoenix schools. (III.C.)
* The application describes the qualifications and attributes of an ideal teacher for the proposed school. These include being reflective, resilient, flexible, receptive to feedback, interested in developing cultural competency, and possessing strong organizational skills, a growth mindset, and a commitment to the mission of the school. (III.C.)
* The application includes a staffing chart and narrative staffing plan for each year of the proposed charter school within the five-year term of the charter. The plan appears generally viable and adequate for the effective implementation of the proposed educational program. (III.C.)
 | * No primary concerns noted.
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| **Facilities, Student Transportation and Finances (III.D. and III.E.)**

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| **Identified Evidence** | **Limited Evidence**  |
| * The application states that the proposed school plans to continue occupying the space currently occupied by Phoenix Academy Lawrence, at 15 Union Street in Lawrence. The facility is large enough to accommodate the school when it reaches its maximum enrollment, is handicap accessible, and does not require any significant renovations. The school plans to lease the space. (III.D.)
* The application states that transportation will be provided using a combination of local bus services provided by the Merrimack Valley Regional Transit Authority (MVRTA) and contracted services for students beyond the routes of the MVRTA or who require special transportation services. (III.D.)
* The application explains the systems and procedures for managing finances for individual Phoenix schools as well as for the Phoenix network. In fiscal year (FY) 2015 the network shifted most financial operations to the network office. The network's chief operating officer, chief executive officer, and the treasurer of the board of trustees are responsible for oversight at the network level, while the head of school and manager of operations at each school are responsible for overseeing day to day financial operations. (III.E.)
* The application describes the board’s and school leadership’s track record of effective financial management over the past five years. The application explains areas of moderate and potentially high risk identified in the Massachusetts Charter School Financial Dashboard as being related to expansion efforts over the past five years and the increased numbers of network staff. The application states that network staffing levels are now adequate for overseeing three schools. (III.E.)
* The application describes how the network has increased efficiency by hiring network staff members who are able to oversee certain human resource, operational, and financial management functions at all three network schools. (III.E.)
* The application describes the fiscal controls and financial management policies the board of trustees employs to remain informed of the school’s financial position and how the school will track finances in its daily business operations in order to maintain needed cash-flow. (III.E.)
* The network's contingency plan consists of having a line of credit and having the board raise additional funds. The application states that neither of the existing schools in the network has ever needed to use their lines of credit. (III.E.)
* The application explains how the budget and cash flow projections were developed using the network's experience opening and operating existing schools. The application also summarizes financial forecasts from the school’s start-up phase through its fifth year of operation, drawing on the network's experience opening and operating existing schools. (III.E.)
* The application includes a cash flow projection for the first year of operation and a multi-year budget from the school's start-up phase through its fifth year of operation. The budget and cash flow projections are generally realistic and generally reflect the expenses related to commitments proposed in the application. (III.E.)
* The application states that the Phoenix Foundation will provide start-up support, and includes evidence of the foundation's track record of fundraising over the past five years. (III.E.)
 | * No primary concerns noted.
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