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Introduction and Applicant Background

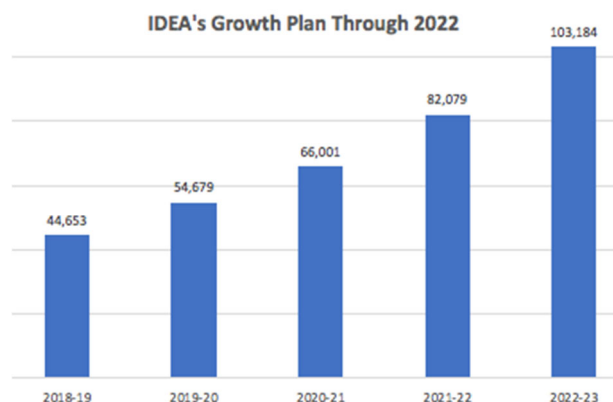
IDEA Public Schools currently serves a student population that is 88.6% economically disadvantaged¹ and 94.7% Black or Hispanic. IDEA will use CSP funding to replicate its proven academic model in the existing Texas regions of the Rio Grande Valley, Austin, San Antonio, El Paso, and Southeastern Louisiana (East Baton Rouge Parish), as well as in the new regions of Tarrant County (Ft.

Worth), Houston, and the Permian Basin of Texas; Tampa Bay, Florida; and in New

Orleans and Jefferson Parishes in Southeastern Louisiana.



Over the next five years, the IDEA network will grow its high-performing CMO from 79 to 199 schools and will increase the number of low-income, high-needs students it serves by 131% from the 44,653 currently enrolled to a projected 125,000 by the end of the CSP funding period in 2023-24. By 2023-24, IDEA will have graduated 14,198 alumni.



While this rate of growth may seem ambitious, it is important to note that **IDEA has grown from one small school with 150 students in 2001 to the nation's fastest-growing network of tuition-free, Pre-K-12 public charter schools with an ongoing track record of academic**

¹ See Appendix F for school demographic breakdowns including low-income/FRL data.

excellence. IDEA has been named **America’s Best Charter School Network** by the Eli and Edythe Broad Foundation, listed by The Washington Post among the **top 1% of America’s Most Challenging High Schools**, and is nationally ranked on U.S. News & World Report’s **best high schools** lists (see **Appendix I.1** for IDEA’s accolades and sources for each). Perhaps most noteworthy: **IDEA is on track to maintain its legacy of sending 100% of its graduates to college.**

Absolute Priority 2: Low-income Demographic

As detailed in Appendix E, **IDEA serves a low-income population at all of its 79 current schools.** The percent of students eligible for free- and reduced-price meals ranges from 66.14% (IDEA Kyle College Preparatory) to 99.41% (IDEA Elsa Academy)—26.14 and 59.41 percentage points, respectively, higher than the 40% CSP threshold.

Competitive Preference Priority 1: IDEA Promotes Diversity

IDEA Public Schools is an open-enrollment charter management organization currently operating 79 schools where students enroll after being chosen by lottery. **No enrollment preference is given to students of any particular race or economic profile, and no race of students is excluded or limited. The student population across all IDEA schools is 89.2% Hispanic, 5.5 % African American, 3.9% white, and 1.4% other races and ethnicities.**

Over 69% of IDEA’s Class of 2018 will be the first in their families to earn a college degree. Not only does this trend fundamentally change the trajectory of lives for students and their families, it also changes the ethnic, racial, and cultural diversity profiles of the colleges to which IDEA sends its many graduates, increasing the rates of academic success and degree completion for low-income minority students nationwide.

Racial and Economic Diversity. IDEA intends to diversify by design, both within existing

regions and as it moves into new regions. For example, some of IDEA’s schools in Austin, TX will work to serve students from mixed-income neighborhoods and will continue to recruit students from different social, economic, ethnic, and racial backgrounds in accordance with the Voluntary Desegregation Plan IDEA developed in 2016 (see **Appendix I.2**), which includes Diversity, Equity, and Inclusion strategies. IDEA is making careful and strategic school siting decisions to achieve diversity and avoid racial isolation, while meeting community demand for IDEA schools. IDEA’s Health Professions campus in Austin is focused on attracting a student population that is 55% Hispanic, 30% white, 10% African American, 5% Asian, and 60% low-income. Due to Austin’ hyper economic and racial segregation along the central I-35 corridor, IDEA seeks to locate at least two future K-12 schools near this highway in order to draw an economically diverse student body—a strategy which is most likely to lead to racial diversity as well. In addition, in 2018, IDEA located its two newest Austin schools in mixed-income neighborhoods in the Kyle and Pflugerville communities near the I-35 highway where segregated socioeconomic groups come together.

Current free- and reduced-price meal eligibility rates in these communities are both below 50% (Kyle: 47.5%; Pflugerville: 42.5%)², but IDEA serves students in these communities with higher levels of poverty than their surrounding public school districts. IDEA’s Kyle schools are 71% FRL-eligible and IDEA’s Pflugerville schools are 83%. Demographics in these schools are also more diverse.

Campus	Hispanic	Black	White	Asian	Other	2+ Races
IDEA Kyle Academy	72.68%	4.79%	19.15%	0.28%	0.56%	2.54%
IDEA Pflugerville Academy	69.71%	16.47%	7.94%	2.94%	0.29%	2.65%
ALL IDEA TEXAS	91.7%	3.6%	3.6%	0.6%	0.1%	0.4%

² Texas Education Agency TAPR Report

IDEA understands that school location is key to serving the broader range of diversity IDEA wishes to attract and is aware of research showing the benefits of racial and economic integration—in particular, the U. S. Department of Education’s Office for Civil Rights’ research stating that the academic achievement of students at racially isolated schools often lags behind their peers at more diverse schools are exactly the statistics IDEA intends to change. IDEA will continue to diversify its school populations in new and existing regions of Texas and Louisiana as well as in a new state, Florida, in alignment with “*Guidance on the Voluntary Use of Race to Achieve Diversity and Avoid Racial Isolation in Elementary and Secondary Schools*”³. (See **Appendix I.3** for IDEA’s growth site selection rubric.) Again, see Appendix E for free- and reduced lunch data by school, which ranges from 66.14% to 99.41% FRL-eligible.

This approach to diversity by design has also seen African American enrollment increase 163% in the past five years from 2.4% to 6.32% at IDEA’s now ten Austin schools. The table at right shows IDEA’s diversity by region.

REGION	Hispanic	Black	White	Other
Austin	85.04%	6.32%	6.59%	2.05%
Lower RGV	96.86%	0.12%	2.39%	0.64%
El Paso	87.17%	3.04%	7.61%	2.17%
Upper RGV	96.06%	0.42%	2.53%	1.00%
San Antonio	80.36%	11.89%	5.44%	2.23%
Southern Louisiana	11.08%	79.98%	8.58%	0.36%
ALL IDEA	89.22%	5.52%	3.89%	1.37%

Across the Fort Worth Independent School District (the largest public school district in Tarrant County), 77.7% of students are eligible for free- and reduced-price meals (2017-18 Texas Education Agency data). IDEA has been **recruiting students from all communities** in Fort Worth by advertising with culturally specific media outlets such as radio stations with large African American audiences, in Baton Rouge by door-knocking in neighborhoods throughout the

³ US Department of Justice, Civil Rights Division and US Department of Education, Office for Civil Rights. <http://www2.ed.gov/about/offices/list/ocr/docs/guidance-ese-201111.pdf>

city and staffing information tables at local Walmart stores and Latino supermarkets, and by holding awareness and recruitment events in all socioeconomic neighborhoods in IDEA cities.

Staff Diversity. Research presented by Frederick Hess and David Leal (1997) indicates that the percentage of minority faculty has a significant positive relationship with overall college matriculation rates in urban school districts across the nation. IDEA strives to have the diversity of its school leadership and teaching staff reflect the diversity of its student population and local communities. To this end, IDEA has recruited and trained a body of principals that is 66.7% Hispanic and 8.3% African American. Principal in Residence (PIR) cohorts from the past five years have also been growing increasingly diverse (recruiting more people of color) each year as IDEA expands its model—from 43% PIRs of color in 2012-13 to 66% in 2018-19. IDEA’s current teaching staff is 75.5% Hispanic, 14.9% white, 8.1% African American, and 1.4% Asian. This, too, will further diversify as IDEA expands into new regions, for example in Southern Louisiana where 79% of students are African American, 77% of the teachers and administrators are African American (**Appendix I.4**).

Diverse Learners: Students with Disabilities. IDEA offers a robust special education program that serves Pre-K-12 students in developmentally appropriate and inclusive instructional groups in accordance with their Individual Education Plans (IEPs), Direct Instruction math and reading groups for Pre-K - 2, individualized Critical Student Intervention (**Appendix 1.5**) supports in math and reading for students in grades 3-7, and core content support for students in grades 8-12 during an individualized instruction/ACT test preparation period known as Catalyst. In addition, IDEA high schools offer a Content Mastery period for students needing additional academic support to pass End-of-Course exams as a graduation requirement. All students with

special education needs at IDEA are served through the RISE⁴ (Reaching Independence through Support and Education) program, the mission of which is to provide services that empower students to become active members of society based on their individual strengths and abilities.. More than 70% of IDEA campuses host RISE programs (see **Appendix I.6** for a list of RISE locations and IDEA’s RISE Playbook). IDEA has also seen an increase in the past few years of autistic, emotionally disturbed (ED), and intellectually disabled students. For example, from 2014-15 to 2018-19, the number of ED students enrolled at IDEA has risen 171%, and the number of students with Autism has risen 209%. (See **Appendix I.7** for examples of programming for this student group and **Appendix 1.8** for 5 years of increasing Special Education students.)

Overall, 5.2% of IDEA students are served by Special Education programs, though this varies widely by region. Outside of the Rio Grande Valley, the percent of students served is 7.51% in Austin and in El Paso, and 7.24% in San Antonio, much closer to the state average of 9.1%. **Several IDEA schools serve Special Education populations that are significantly higher than the state average** (IDEA Eastside College Prep: **10.66%**; IDEA Rundberg College Prep: **11.2%**; IDEA Edgemere College Prep: **11.9%**; IDEA Judson College Prep: **12.22%**; IDEA Walzem College Prep: **12.74%**; IDEA Rio Vista College Prep: **14.29%**; and IDEA Ingram Hills College Prep: **18.58%**). Over the last three years (2016-17 through 2018-19), IDEA’s Special Education population has grown by 65% as the overall student population has grown by 44% (see **Appendix I.9**)—proof that word is spreading about IDEA’s specialized academic programs. As IDEA enters new communities, school leaders and teachers work with families to ensure they have information about available special populations program, which

⁴ Formerly known as Life Skills

generally leads to an increase in program enrollment (see **Appendix I.7 and I.10** for information IDEA supplies to new families with special needs students). **Application Requirement A1.**

Cultural and Language Diversity: English Language Learners. The proportion of IDEA’s Texas-based students served by ELL programs (32.9% in 2017-18) is 14.1 percentage points, or 75%, higher than the percent of ELL students statewide (18.8%). IDEA’s Southeastern Louisiana current ELL population is 12% vs 3.3% for the state (2015), demonstrating greater diversity.

Competitive Preference Priority 2: IDEA will reopen poor-performing public schools as charter schools

(i) IDEA demonstrates past success working with poor-performing schools

IDEA Public Schools has demonstrated experience turning around a poor-performing school inside its own network. In 2006-07, student achievement, financial, and human resources data indicated that IDEA Frontier was significantly lagging behind the IDEA’s high academic and operational standards, and the school was rated as Priority by the Texas Education Agency. In 2007-08 after supports and interventions did not achieve the desired results, the Superintendent exited the principal, turned over the majority of teachers, and installed new leadership and teachers who had new, clear expectation grounded in student achievement results. At the mid-point of 2009-10, the lack of evidence that students, teachers, and school operations were progressing at an aggressive, reform-based pace failed to inspire confidence in the school’s leadership and its direction, and the Superintendent again replaced the school leader and removed the lowest-performing teachers. That last leadership change, together with the rigorous IDEA academic and operational models previously described, provided the structure that the campus needed to reach its intended goals. **IDEA Frontier is now among the highest performing College Prep schools in the IDEA network and is ranked as the 12th best high**

school in Texas (up from 15th), 23rd best among all charter high schools, and 65th best in the nation overall (up from 79th) by the US News and World Report⁵.

(ii) IDEA will reopen poor performing public schools as charter schools

In 2020-21, in partnership with Midland Independent School District Midland ISD (see attached letter of support from the Superintendent in Appendix C), IDEA will open its first schools in Texas’s Permian Basin, or PB (Texas’s Region 18 area), **where the majority of traditional public schools are low-performing**. Midland Superintendent Orlando Riddick notes in his letter that IDEA is committed to “working closely with us in at least one of our persistently struggling schools.” Only 16.1% of PB students take Advanced Placement courses as compared with 100% of IDEA’s students, and of this number, only 39.7% of PB students score at or above criterion on the AP exams as compared with 55.5% of IDEA’s students. Only 41.1% of PB students take the SAT or ACT, and only half of those (22.1%) score at or above criterion (effectively fewer than 10 students out of every 100 who test⁶). All of IDEA’s students take the ACT, and 21.8% of the Class of 2016 scored at or above criterion—effectively 21.8 of every 100 students tested, or 2.23 times the number of students in Midland ISD.

The following graphic shows a snapshot of 2016-17 and 2017-18 data for all grades, all subjects and for ELA/Reading and Math for Midland ISD (“District”) as compared to surrounding districts (“Region 18”) and the State of Texas as a whole. Although the performance of Midland as a district mirrors that of the region, **Midland underperforms the state in every indicator noted**. Please also see **Appendix I.11** for more extensive 2016-17 and

⁵ <https://www.usnews.com/education/best-high-schools/rankings-overview>

⁶ 22.1% score at or above criterion of the 44.1% who are tested = 9.75 students. TEA 2016-17.

2017-18 data for Midland ISD.

In 2021-22, IDEA will partner with Ector County ISD (Odessa, TX) in the same PB region

		State	Region 18	District	African American	Hispanic	White	American Indian	Asian	Pacific Islander	Two or More Races	Special Ed	Econ Disadv	EL (Current & Monitored)
All Grades All Subjects														
At Approaches Grade Level or Above	2018	77%	66%	67%	56%	63%	81%	71%	77%	90%	70%	37%	58%	54%
	2017	75%	65%	67%	58%	63%	80%	58%	72%	*	72%	36%	57%	55%
At Meets Grade Level or Above	2018	48%	35%	38%	26%	33%	54%	29%	49%	55%	44%	22%	28%	25%
	2017	45%	32%	36%	25%	30%	53%	29%	46%	*	41%	22%	25%	22%
At Masters Grade Level	2018	22%	13%	16%	9%	12%	27%	14%	27%	16%	19%	9%	10%	9%
	2017	20%	12%	14%	9%	10%	24%	6%	23%	*	17%	8%	8%	8%

(see letter of support). **On average, only 17% of students in this region complete college as compared with 45% of IDEA's students.** IDEA is excited for the opportunity to bring a rigorous, proven, college-preparatory curriculum to the students of this struggling district.

IDEA will replicate its successful open-enrollment charter school model, including the same curriculum and training, Principal in Residence program, and Teacher in Residence program that exist in all current regions as IDEA expands to its 9th region (Permian Basin).

These programs have already provided significant evidence of success and will be replicated with fidelity. As allowed by Texas law, current students in these schools will be given first lottery access to enroll in the K-6 school and will then open to other students in the community.

Therefore, the student population in the replicated charter schools will likely be demographically similar (or even the same) as was served by the academically poor-performing public schools in Midland ISD, consistent with nondiscrimination requirements contained in the U.S. Constitution and Federal civil rights laws.

In 2017-18, Midland's student population was majority-minority (61.9% Hispanic, 25.8% white 7.6% African American, 4.2% other races/ethnicities) and majority low-income (50.4%). Ector County ISD's student population was 75.5% Hispanic, 18.2% white, 3.9% African American, 2.1% other races/ethnicities, and 51% low-income.

Competitive Preference Priority 3—IDEA Serves High School Students

(i) IDEA serves educationally disadvantaged high school students

New IDEA schools begin with a “Year 0” for planning (as seen the budget), then open with students enrolled in grades K, 1, 2, and 6 and grow by one grade level each year until each campus is fully scaled, PK/K-12⁷. **Application Requirement C2.** IDEA Academy (elementary) schools serve educationally disadvantaged students in grades PK/K-5. IDEA College Preparatory (secondary) schools serve educationally disadvantaged students in grades 6-12. Each school maintains its own separate building (ex: IDEA Donna Academy and IDEA Donna College Prep), and the two buildings together comprise one IDEA campus.

In alignment with its mission to prepare students from underserved communities for college and citizenship, IDEA is committed to serving even more low-income high school students in new communities. **This 2019 CSP grant initiative will create seats at a total of 49 College Preparatory campuses serving 35,930 new high school students in grades 9-12 at full**

enrollment,
maintaining the
same
economically
disadvantaged
rates (as noted in
Appendix E) and
continuing to focus on recruiting student with all educational needs.

Number of New High School Students to be Served with CSP Funding						
REGION	Econ Disadv*	2019-20 Year 1	2020-21 Year 2	2021-22 Year 3	2022-23 Year 4	2023-2 Year 5
Austin	45.5%	0	0	232	464	696
El Paso	74.3%	0	0	232	348	580
Houston	75.0%	0	0	0	0	232
Permian Basin	47.1%	0	0	0	0	0
Rio Gr Valley	85.1%	0	116	348	580	928
San Antonio	59.7%	116	348	464	580	696
Southeastern LA	68.0%	168	168	252	236	222
Tampa Bay	58.1%	56	56	112	112	107
Tarrant County	77.7%	0	0	0	0	0
Total HS Replication Seats		340	688	1,640	2,320	3,461
When fully scaled, these high schools will collectively enroll over 20,800 students. *Econ Disadv rates shown are for the overall regions to be served (some are new to IDEA). Rates for current IDEA schools (and for IDEA schools by region) are much higher as shown in Appendix E.						

(ii) IDEA prepares all students for enrollment in postsecondary education

IDEA deploys a cutting-edge educational model (see Appendix I.12) that moves students from a high-intensity teacher-led instruction to a student-driven program, while

⁷ Some IDEA schools serve Pre-Kindergarten students; others begin with Kindergarten.

enhancing the individualization of instruction with technology-assisted learning. IDEA's philosophy is to design a tight, replicable PreK- or K-12 program model, getting students on-grade level in order to lead them to college preparedness and college graduation. This approach ensures that *every* child receives individualized instruction that prepares them academically for IDEA's rigorous secondary-level college-preparatory environment. **100% of IDEA students have been accepted to a college or university every year for thirteen consecutive years.**

IDEA, together with various regional partners, offers a myriad of **academic readiness, college knowledge, and college-going identity activities for students in grades 6-12 as well as for parents** in order to ensure *all students* are prepared for post-secondary education. Please see **Appendix I.13** for a table illustrating **36 separate categories of activities** (ex: Pre-AP/AP/IB courses, college visits, monthly parent workshops, FAFSA/TASFA completion, college application assistance, college counseling, standardized test prep, career exploration, peer mentoring, etc.) by grade level of participating students and families.

AP for ALL; A one of its kind in the nation college-going curriculum

In 2017 (most recent comparative data available), almost 3 ½ times more IDEA students took AP tests than the state average (90.4% vs. 26.2%), and proportionally more students passed those AP tests than students across the state. For every 100 high school students IDEA enrolls, 90.4 took an AP exam in 2017 and 47.5% (or 42.9 students) passed at least one. Compare this with the state's 26.2 students per hundred who tested and only 49.1% (or 12.8 students) passed. IDEA has adopted an "AP for All" approach that will see *all* students—100%—take 11 AP courses by the time they graduate. On February 22, 2017, Texas Commissioner of Education announced that 36.2% of students nationwide took an AP exam in 2016, while 38.7% of Texas students did. IDEA bests the state rate by over 51

percentage points (134% more students) and exceeds the national rate by over 54 percentage points (150% more students). Of the Class of 2018, 1,050 IDEA students took AP exams; and 85% passed at least one. IDEA focuses on AP for All because peer-reviewed research⁸ by the Educational Testing Service, The College Board, the University of Texas and the U.S. Department of Education all show strong evidence that participation in AP strongly correlates with student achievement, college readiness, and college completion. In addition to AP for All, five IDEA secondary schools also offer International Baccalaureate programming: IDEA McAllen College Prep, IDEA Donna College Prep, IDEA Frontier College Prep, and IDEA Brownsville College Prep (all in the Rio Grande Valley), and IDEA South Flores College Prep (San Antonio).

College counseling at IDEA

In 2005, IDEA's Road to College curriculum was born. This included monthly courses for students in grades 6-8 and quarterly parent workshops. As the network established more secondary schools, IDEA added college counselors, college visits (field lessons) for students and parents, summer learning opportunities.

In 2011, IDEA was awarded a GEAR UP grant and used funds to revamp and rebuild its Road to College curriculum—now called the Road to and Through College; expanded the Duke TIP program by inviting those students to participate in test preparation activities as 11th graders preparing for the Preliminary SAT/National Merit Scholarship Qualifying Test (PSAT/NMSQT); built a College Field Lessons Guide that has been shared with all campuses; offered more robust and innovative summer academic enrichment programming through partnerships with vendors and local colleges; added a program partner to better serve students' needs for ACT and SAT test

⁸ Summarized here: <http://collegeready.rice.edu/ap-and-college-readiness>

preparation; and formed and formalized new external partnerships with Best Delegate, Texas Tech University, and National Hispanic Institute to expand enrichment offerings.

IDEA assists students in the college admissions process

As a result of the work put in to produce its outstanding history of success, IDEA is acutely aware of the indicators that signal a student will be more successful in college. Research has shown that the caliber of a college greatly impacts a student’s propensity to graduate.⁹ Therefore, IDEA’s College Counselors ensure every student applies to and is accepted by an institution of higher education that is a just-right match for his or her academic abilities, career objectives, and personal financial situation. According to the American Enterprise Institute, Hispanic students are especially likely to be “under matched,” or to enroll at a college that is less selective than they are qualified to attend. Given the relationship between selectivity and graduation rates, under matched Hispanic students are more likely to leave college without completing their degrees than if they had attended more selective schools.¹⁰

In 2013-14, 77% of IDEA seniors applied to a Tier I or II school, 22% were accepted, but only 6% matriculated. Since then, IDEA’s HQ-based College and Alumni Success Team (CAST) has focused on helping all juniors and seniors create and refine their college lists to correct under-matching.

In 2016, CAST saw that students’ college lists weren’t taking into consideration match-

⁹ Caroline Hoxby & Sarah Turner, “Expanding College Opportunities for High-Achieving, Low Income Students,” Stanford Institute for Economic Policy Research, March 2013, <http://siepr.stanford.edu/?q=/system/files/shared/pubs/papers/12-014paper.pdf>.

¹⁰ <http://www.aei.org/files/2010/03/18/Rising-to-the-Challenge.pdf>

alignment to the extent they should. CAST began providing Counselors with targeted training to help students refine their lists in their junior and senior years. This resulted in deeper conversations with students about schools, quality financial aid packages, expectations for the average amount of debt for a college degree, and the student loan process.

The 2018-19 school year began with an application boot camp for all new grade 12 College Counselors and those not proficient at the college application process. This year, CAST is focusing on getting ALL high-merit students—those with a 3.25+ GPA and a 21+ ACT—accepted AND matriculated to a Tier I or II school.

IDEA assists students with the financial aid application process support

IDEA has taken care to include high school facilities that are better suited to college preparation activities, namely a Road to and Through College space fitted with accordion walls that can accommodate 60+ parents at a time for FAFSA/TASFA completion. **Since these facilities changes were made, IDEA has had 100% FAFSA/TASFA completion for all its graduating seniors for the past eight years.** As noted on the previous page, College Counselors work in partnership with students, their families, and IDEA's college partners to ensure each student receives the best possible financial aid package, even appealing to colleges to reconsider their initial offering.

In addition to these supports to seek quality financial aid, IDEA operates an annual internal fundraising campaign called “Give Me Five” that provides college scholarships for everything from tuition to transportation to and from college (for students attending out-of-state) to incidentals. Over 90% of *all* IDEA staff—including bus drivers, custodians, teachers, school leaders, and network leaders—participate in Give Me 5 Five, and the most recent campaign raised over \$550,000 to assist students most in need.

IDEA prepares students to take standardized admissions tests

All IDEA juniors and seniors participate in intensive, targeted test preparation and core content support for during Catalyst, IDEA's individualized instruction/ACT test preparation period. Key to IDEA's 100% college acceptance rate is that more than 95% of IDEA students take the ACT exam, compared to only 73.5% of students who do so across the State of Texas.

(iii) IDEA provides support for educationally disadvantaged students to persist in and attain a college degree

Beyond sustaining its record-setting 100% college acceptance and 99.9% college matriculation rates for 12 consecutive years, IDEA takes responsibility for supporting students through *college graduation* as well. The impact of IDEA's work to date can be seen in the

increase of its students
persisting in college.

According to the

Current Persistence Rate by HS Graduating Class	Class of 2014	Class of 2015	Class of 2016	Class of 2017
College Persistence/Graduation	50%	58%	66%	71%
Non-Economically Disadvantaged	61%	70%	73%	87%
Low-income	48%	56%	64%	70%
ELL	31%	38%	47%	60%
Special Education	33%	48%	43%	43%

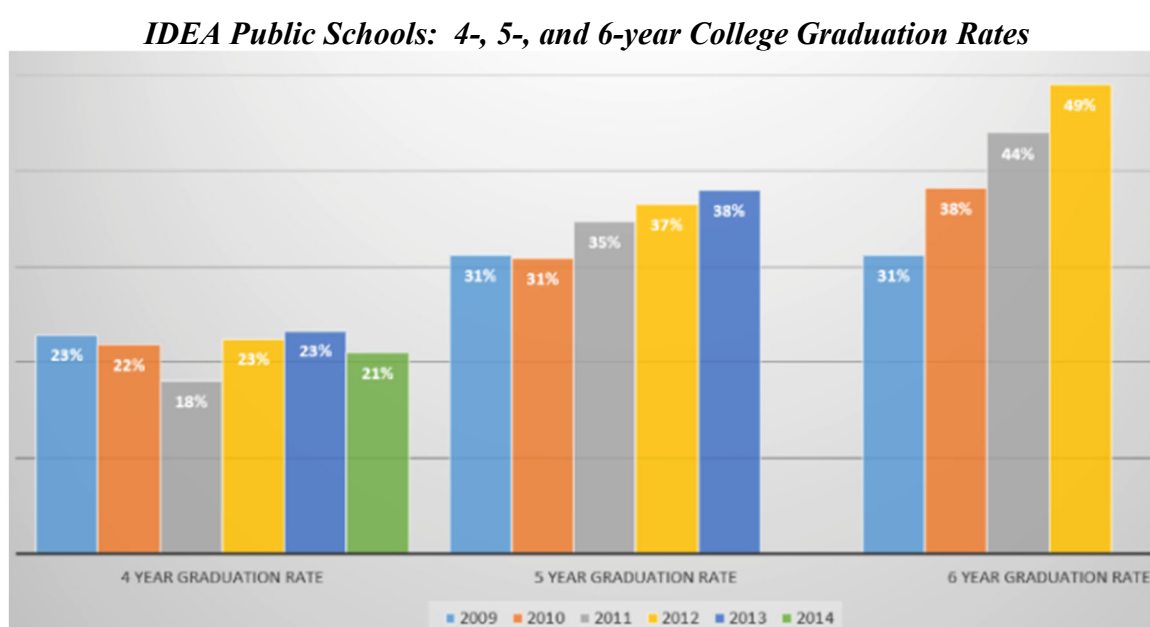
National Student Clearinghouse, 59.6% of IDEA's students (and 58.2% of low-income students) have graduated *or are still enrolled and on track to graduate* from college. College persistence rates have improved every year for the past 3 years with 81% of students enrolled in college the first year after high school returning for a second year (freshman to sophomore persistence—the most critical time for retention). **IDEA students are now graduating from college at a rate that is more than four times the national average for low-income students—45% vs. 9%.¹¹**

¹¹ Article: <https://money.cnn.com/2015/02/04/news/economy/college-graduate-rich-poor/index.html>; Study: <https://files.eric.ed.gov/fulltext/ED555865.pdf>

Forty-five percent of all IDEA alumni complete a college degree within six years of enrollment, compared to only 13% in Texas and 9% of low-income students nationally¹².

The following graphic shows college completion rates IDEA students. (See **Appendix I.14** for more detail on Alumni Support and Results and community college averages where IDEA operates).

The evidence is clear: **IDEA is closing historic achievement gaps by increasing student achievement and sending more low-income, minority students to college.**



As noted in the previous section, in 2013-14, IDEA’s College and Alumni Success Team (CAST) implemented its Theory of Change: **Improve college graduation rates by sending more students to better colleges with proven ability to graduate students in 4-6 years.** An Inside Higher Ed article notes that, “Students from households in the bottom income quartile make up just 3% of enrollment at the nation’s most competitive colleges...but 72% of enrollment at these colleges is comprised of students from the wealthiest quartile.” This challenge persists at

¹² <https://schools.texastribune.org/outcomes/states/tx/>

IDEA as well. Almost 89% of IDEA students are economically disadvantaged and, although 99.9% of seniors matriculated to college last year, only 50% of Tier 1 merit students in the Class of 2018 attended a Tier I college or university.

IDEA simplified Barron's top four college competitiveness rankings, grouping them into "Tier I" and "Tier II", and knew that at least one-third of its students had the academic merit to attend. CAST leaders then set an org-wide goal to significantly increase the percentage of students matriculating to these schools against these ambitious outcomes: 75% of all students will apply to at least one top institution, 50% will be accepted, and 25% will attend.

Over the past four years, IDEA focused on increasing applications and matriculation to Tier I and II universities, going from 6% attending these universities to 18% and are seeing graduation rates rise (from 31% to 49%). However, while 70% of students with Tier I and II merit were accepted to matched schools, only 50% are attending. Therefore, many of IDEA's low-income, minority students are not attending their best-matched school which, research shows, would dramatically increase their likelihood of persisting and graduating from college.

Data shows that for the Class of 2018, 97% of students with Tier I and II merit applied to matched colleges, 70% of them were accepted, but only 50% matriculated. This is drastically improved from the Class of 2014, when 77% applied, 25% were accepted and 12% matriculated. These results show the importance of this org-wide focus and the potential impact on college completion: 52% of Tier I and II merit students that went matched schools *graduated* in four years compared to 35% of students that went to Tier III and IV colleges (a 17 percentage point difference).

IDEA has been hard at work to close this achievement gap since 2011 when it invested in building CAST to fulfill its mission of preparing students for success in college and citizenship.

IDEA is getting closer due to continuously improving its practices through data-driven decisions and reflective practices. As demonstrated previously, IDEA’s focus to significantly increase matriculation to Tier I and II schools has improved over the last five years (from 77% of IDEA seniors applying to Tier I and II, 22% accepted and 6% matriculated in 2014 to 76% applying, 47% accepted and 19% matriculated in 2018) due to IDEA’s continuous improvement practices.

IDEA’s support for college success now extends through the first two years of students’ college experience as students establish themselves as part of their chosen college community. IDEA locates Alumni Team staff on the college campuses where a large proportion of its graduates enroll (for example, University of Texas-Rio Grande Valley and South Texas College, see **Appendix I.14** graphic). Having these team members nearby to create communities of IDEA graduates on college campuses has made a significant difference in getting students to *and through* college. Structures such as one-on-one office hours, small-group sessions, and text “nudges” provide varying levels of support to students, shepherding them through the first three semesters of college when transition points are most difficult (after winter break freshman year, after spring break freshman year, and after the summer prior to sophomore year). IDEA’s current rate of success against these college persistence targets is as follows:

IDEA’S COLLEGE PERSISTENCE METRICS	CURRENT	GOAL
% of Freshmen alumni remaining continuously enrolled (Full-time Class 2017)	78%	85%
% of Sophomores Will Remain Continuously Enrolled (Full-time Class 2017)	52%	75%
% of Sophomores who return for Year 2 (Class of 2017)	75%	80%
% of Freshmen persisting in the spring semester	90%	90%
% of Alumni Graduating in 4 Years (long-term goal 45%)	21%	25%
% of Alumni Graduating in 6 Years (long-term goal 65%)	49%	55%
% of Alumni Will Be Enrolled in or Graduated from College	59.6%	90%

(iv) IDEA’s project-specific performance measures

IDEA consistently sets and relentlessly pursues a number of specific performance measures and indicators that track the success of its high school students’ progress in being prepared for

and persisting in college. In addition to the stated goals for the number of students applying to, being accepted by, and matriculating to a Tier I or II college or university, **please see Goal 1 on page 41 for metrics related to overall college matriculation and enrollment, AP Scholars/IB Diplomas, average ACT score, and 4- and 6-year college graduation.** IDEA assures the USDE that it will provide data that are responsive to the measures, including performance targets, in its annual performance reports to the Department.

(v) IDEA prepares students for success in four-year IHEs

IDEA's Class of 2018, composed of 849 college-bound seniors, 590 of whom will be first-generation college attenders, also accepted invitations to attend Cornell University, Brown University, Columbia University, Rice University, University of Chicago, University of Texas at Austin, University of Texas Rio Grande Valley, George Washington University, among many other four-year institutions, including the ones noted in **Appendix I.14** which shows the top 25 IHEs where IDEA graduates enroll. Collectively, this group won more than \$34 million in grants and scholarships and collected a total of 4,654 college acceptances from 377 universities, including 257 Tier I and 584 Tier II acceptances.

A. IDEA PUBLIC SCHOOLS: A HIGH-QUALITY CSP APPLICANT

(i) IDEA Public Schools demonstrates excellent academic achievement results

Student performance on statewide assessments

IDEA Public Schools has ample evidence (presented by campus in Appendix G) that it succeeds in attaining outstanding student academic achievement for all students as well as for student subgroups—African American, Hispanic, White, Special Education, Economically Disadvantaged, and English-language Learners. The following graphic shows an excerpt of this data, summed across all grades and subjects and all levels of achievement

(Approaches/Meets/Masters), for 2016-17 and 2017-18 and denotes district-wide data as well as state comparison subgroups (all students, SPED, economically disadvantaged, and ELL).

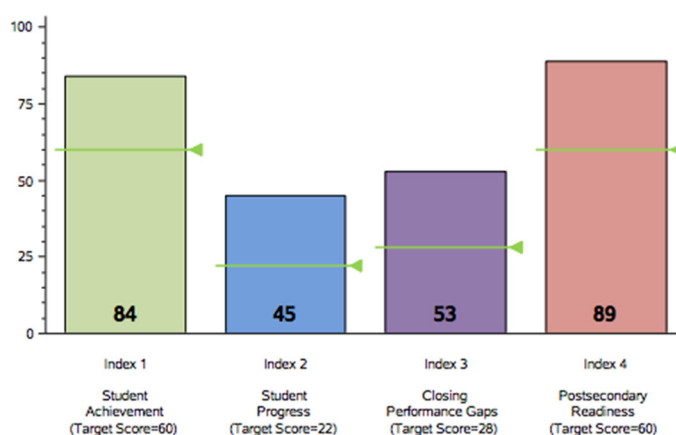
IDEA vs. State of Texas: Performance Rates by Tested Grade, Subject and Performance Levels									
All Grades, All Subjects	Year	IDEA All St.	STATE (TX) All St.	IDEA Econ Disadv	State Econ Disadv	IDEA ELL	State ELL	IDEA Sp Ed	State SpEd
At Approaches Grade Level or Above	2018	84%	77%	83%	70%	81%	69%	59%	45%
	2017	83%	75%	82%	68%	80%	66%	54%	41%
At Meets Grade Level or Above	2018	55%	48%	53%	38%	49%	36%	34%	24%
	2017	53%	45%	51%	34%	46%	33%	29%	21%
At Masters Grade Level	2018	26%	22%	25%	14%	22%	14%	14%	8%
	2017	23%	20%	22%	12%	19%	13%	11%	7%

Note: IDEA economically disadvantaged and IDEA ELL students outperformed the state passing rate for all students at each STAAR performance level as noted in the bolded boxes

Also in Appendix G, see comparisons between IDEA and each of four regions (1: Rio Grande Valley, 13: Austin, 19: El Paso, and 20: San Antonio)¹³. Shaded cells with **bold print** %s indicate that IDEA's student performance is higher than the comparative group in the next column (ex: IDEA Special Ed vs. state Special Ed). **For IDEA vs. the state (preceding graphic), IDEA's student achievement for all subjects and across all testing levels (approaches/meets/ masters grade level) is higher than state averages for students from all backgrounds.** This is also true for every comparison group in every region with only one exception (IDEA vs. Region 19, Special Education). Again, it is important to keep in mind that **IDEA serves a population that is significantly more educationally and economically disadvantaged (89.5%) than that of the entire state (Texas low-income: 58.8%), yet its academic results are stronger overall.**

¹³ Data for IDEA's El Paso and Southeastern Louisiana regions will be available July 2019.

In addition to this outstanding achievement, the district as a whole and each individual school receive annual scores on four indices—1) Student Achievement; 2) Student Progress (academic growth); 3) Closing Performance Gaps; and 4) Post-Secondary Readiness—that combine to determine their overall accountability rating. As a district, IDEA’s scores across all four indices demonstrate significant achievement above and beyond the targets set by the state (shown by the green line in each bar).



Annual student attendance rates

The State of Texas tracks attendance rates at the state, region, and district levels and for all student subpopulations. The following graphic (most recent comparison data available) shows IDEA maintains higher attendance rates than the region and state and that these rates are universally high across all student subgroups. Application Requirement B3

	State	Region 01	District	African American	Hispanic	White	Special Ed	Econ Disadv	EL (Current)
Attendance Rate 2016-17	95.7%	95.7%	97.8%	97.7%	97.8%	97.1%	97.2%	97.7%	98.0%
2015-16	95.8%	95.6%	97.6%	96.8%	97.6%	96.9%	96.9%	97.6%	97.9%

Annual student retention rates

The State of Texas does not track student retention rates, but IDEA Public Schools does, couched in terms of student persistence (defined as year-over-year enrollment) which includes all student movers regardless of reason (e.g. moving out of state, parent change of employment).

IDEA's org-wide goal is 90% (red line). In 2017-18, IDEA achieved 86.7% student persistence (retention). As of Dec 28,

2018, five of IDEA's six existing regions have persistence levels greater than 93%. **Application**

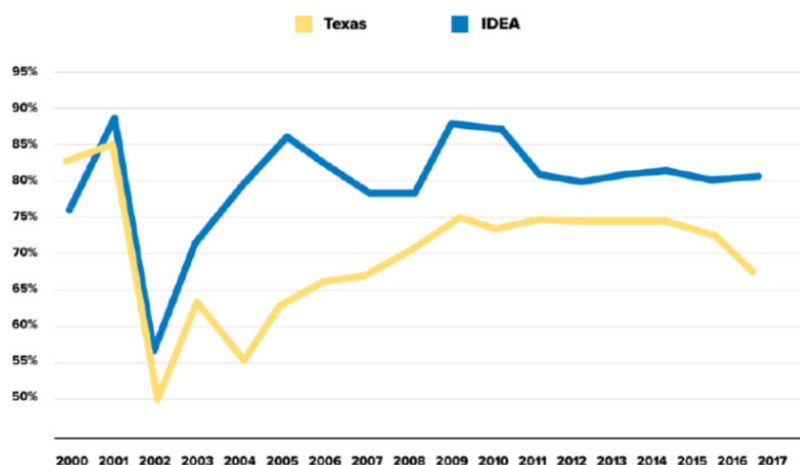
Requirement B3. The

State does track the annual drop-out rate for grades 7-12 and in the most recent data available (2016-17), IDEA reported 0% of students dropped out vs. 2.2% in Texas (see **Appendix G** for full report).

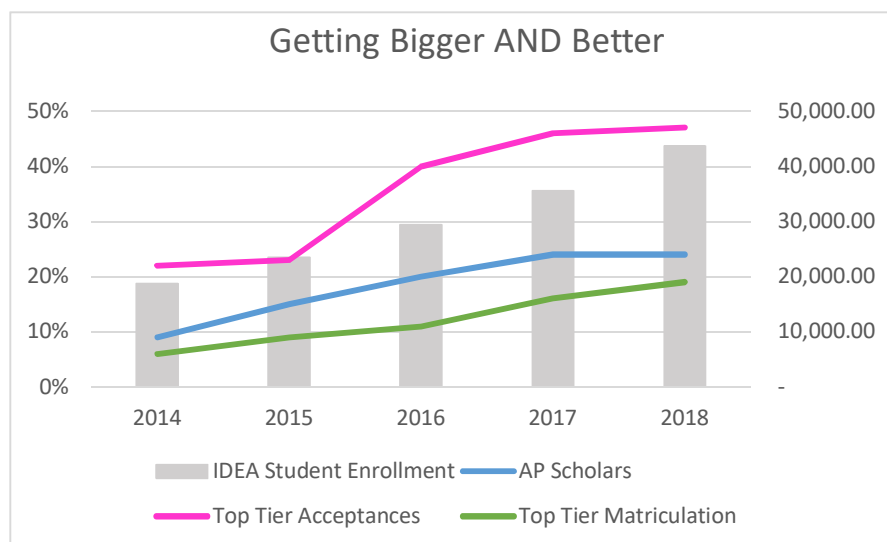
Student academic growth

The detailed graphics on page 20 and **Appendix G** show that IDEA has maintained and even increased student performance on the STAAR exam year over year for all subjects and at all performance levels (Approaches, Meets, and Masters Grade Level) as well as for every educationally disadvantaged group (economically disadvantaged, Special Education, and ELL). The next graph shows 18 years of state testing data for all students as compared with the state.

BETTER & BIGGER: 18 YEARS OF STATE TESTING DATA



IDEA also tracks additional measures that show a depth of academic growth not measured by the state exam. The graphic at right illustrates that IDEA continues to increase the number of AP Scholars (IDEA’s designation for students earning scores of 3 or higher on at least 3 Advanced Placement course exams) as well as the percent of students that are accepted at and



matriculate to the most highly selected colleges and universities¹⁴ even while increasing the number of students it serves.

High school graduation rates

The following table details the most recent comparative data available for 4- and 5-year longitudinal high school graduation rates as tracked by the state for 2016-17 and 2017-18¹⁵.

IDEA students—all students and students by subgroup—outperform the region and state¹⁶ on these metrics as well.

¹⁴ Please also see page 17 for more detail on these Tier I and Tier II schools.

¹⁵ 2017-18 is the first year 6-year graduation data has been available.

¹⁶ IDEA does not yet have high school students in any state other than Texas.

	State	Region 01	District	African American	Hispanic	White	Special Ed	Econ Disadv	EL (Current)
4-Year Longitudinal Rate (Gr 9-12)									
Class of 2017									
Graduated	89.7%	90.3%	98.4%	-	98.5%	93.8%	100.0%	98.4%	96.6%
Received TxCHSE	0.4%	0.2%	0.3%	-	0.3%	0.0%	0.0%	0.3%	0.0%
Continued HS	4.0%	4.0%	1.0%	-	0.9%	6.3%	0.0%	1.0%	3.4%
Dropped Out	5.9%	5.4%	0.3%	-	0.3%	0.0%	0.0%	0.3%	0.0%
Graduates and TxCHSE	90.1%	90.5%	98.7%	-	98.8%	93.8%	100.0%	98.7%	96.6%
Graduates, TxCHSE, and Continuers	94.1%	94.6%	99.7%	-	99.7%	100.0%	100.0%	99.7%	100.0%
Class of 2016									
Graduated	89.1%	89.7%	99.8%	*	99.8%	100.0%	100.0%	99.8%	100.0%
Received TxCHSE	0.5%	0.2%	0.0%	*	0.0%	0.0%	0.0%	0.0%	0.0%
Continued HS	4.2%	4.3%	0.2%	*	0.2%	0.0%	0.0%	0.2%	0.0%
Dropped Out	6.2%	5.8%	0.0%	*	0.0%	0.0%	0.0%	0.0%	0.0%
Graduates and TxCHSE	89.6%	89.9%	99.8%	*	99.8%	100.0%	100.0%	99.8%	100.0%
Graduates, TxCHSE, and Continuers	93.8%	94.2%	100.0%	*	100.0%	100.0%	100.0%	100.0%	100.0%
	State	Region 01	District	African American	Hispanic	White	Special Ed	Econ Disadv	EL (Current)
5-Year Extended Longitudinal Rate (Gr 9-12)									
Class of 2016									
Graduated	91.6%	92.1%	100.0%	*	100.0%	100.0%	100.0%	100.0%	100.0%
Received TxCHSE	0.7%	0.3%	0.0%	*	0.0%	0.0%	0.0%	0.0%	0.0%
Continued HS	1.2%	1.4%	0.0%	*	0.0%	0.0%	0.0%	0.0%	0.0%
Dropped Out	6.6%	6.2%	0.0%	*	0.0%	0.0%	0.0%	0.0%	0.0%
Graduates and TxCHSE	92.2%	92.5%	100.0%	*	100.0%	100.0%	100.0%	100.0%	100.0%
Graduates, TxCHSE, and Continuers	93.4%	93.8%	100.0%	*	100.0%	100.0%	100.0%	100.0%	100.0%
Class of 2015									
Graduated	91.3%	91.0%	99.6%	*	99.6%	100.0%	100.0%	99.6%	97.4%
Received TxCHSE	0.8%	0.5%	0.2%	*	0.2%	0.0%	0.0%	0.2%	0.0%
Continued HS	1.2%	1.6%	0.0%	*	0.0%	0.0%	0.0%	0.0%	0.0%
Dropped Out	6.7%	7.0%	0.2%	*	0.2%	0.0%	0.0%	0.2%	2.6%
Graduates and TxCHSE	92.1%	91.4%	99.8%	*	99.8%	100.0%	100.0%	99.8%	97.4%
Graduates, TxCHSE, and Continuers	93.3%	93.0%	99.8%	*	99.8%	100.0%	100.0%	99.8%	97.4%

College attendance rates

Beyond demand for IDEA's academic model and student achievement results, several data points compelled IDEA's senior leadership team and board of directors to pursue continued ambitious growth plans, including Texas's rapidly growing Hispanic student population, for which IDEA's model has proven successful year after year; the high poverty rate among Hispanic and African American students; the low rate of college completion for low-income students overall (10%); and the staggering college readiness achievement gap (a 23- to 25-point gap between white and Hispanic students in 4th and 8th grade math and 4th and 8th grade reading)¹⁷. Of all Texas high school graduates, only 54.2% are college, career, and/or military

¹⁷ Source: https://www.nationsreportcard.gov/reading_math_2015/#?grade=4

ready, and only 47% are college-ready alone. These figures for IDEA, as calculated by the Texas Education Agency, are 82.2%

on both indicators—28 and 35.2

percentage points higher,

respectively, than the state.

	State	Region 01	District
College, Career, and Military Ready Graduates (Student Achievement)			
College, Career, and Military Ready (Annual Graduates) 2016-17	54.2%	60.9%	82.2%
College Ready Graduates			
College Ready (Annual Graduates) 2016-17	47.0%	51.0%	82.2%

IDEA goes above and beyond getting its graduates *ready for* college and even beyond getting them *to* college. IDEA Public Schools also takes responsibility for seeing its students *well matched with* and *securely established in* the colleges of their choice so they can *complete college* within six years of matriculation.

According to the American Enterprise Institute, Hispanic students are especially likely to be “under matched,” or to enroll at a college that is less selective than they are qualified to attend. Given the relationship between selectivity and graduation rates, under matched Hispanic students are more likely to leave college without completing their degrees than if they had attended more selective schools.¹⁸ Please see page 17 for a description of how IDEA has worked to improve the student/college match, which has improved matriculation to highly selective institutions with the intention of improving six-year college graduation rates over the long term.

The graphic at right shows the percent of IDEA graduates (as compared with the region and state) who are enrolled in a Texas institution of higher education as tracked by the Texas Education Agency. TEA only tracks college matriculation for those students who enroll in a Texas college

	State	Region 01	District
Graduates Enrolled in Texas Institution of Higher Education (TX IHE)			
2015-16	51.8%	54.4%	83.6%
2014-15	56.1%	59.5%	89.2%
2013-14	57.5%	61.6%	91.4%

¹⁸ <http://www.aei.org/publication/rising-to-the-challenge/>

as indicated above, not nationwide¹⁹, and this data is not available by student subgroup.

Therefore, a declining percentage of IDEA students enrolling in a Texas IHE does not mean *fewer* IDEA students are going to college—just that fewer are going to college *in Texas*.

State-level data show that 83.6% of IDEA’s Class of 2016 (the most recent comparison data available) enrolled in **public Texas institutions of higher education**—31.8 percentage points higher than the state’s enrollment rate of 51.8% for all students. This data does not track how many of the remaining students in the state or region attended private Texas IHEs or those *outside* the State of Texas. As IDEA has a 100% college acceptance and 99.9% college matriculation rate, the remaining portion of IDEA’s students (16.4%) are enrolled in **private Texas IHEs** as well as Tier I and II colleges and universities located **out of state** (see **Appendix I.14** for analysis on IHE attended by type and by IDEA graduating class).

College persistence rates

In the regions that IDEA currently serves, the **Rio Grande Valley** as a whole had 15% of low-income students graduate from college in six years for the high school class of 2010 as compared with 32% of students who are *not* low-income. The data for the same class in **San Antonio** and **Austin** is even direr: 13% and 8.3% of these regions’ low-income students, respectively, will graduate from college as compared with 29% and 28% of students who are *not*

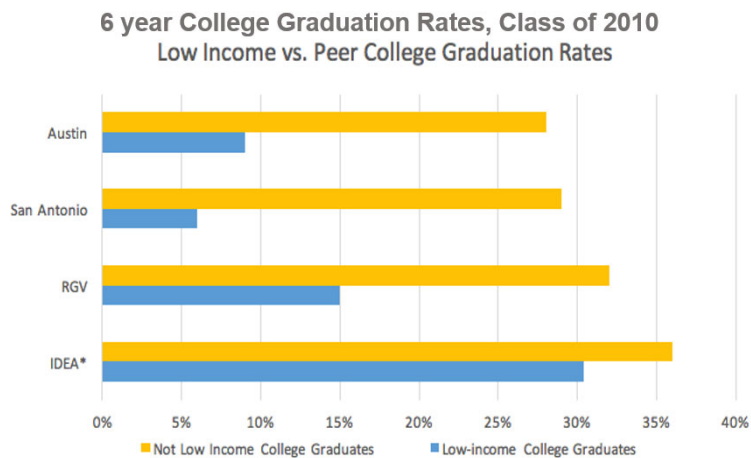
¹⁹ The National Student Clearinghouse provides data for all participating colleges and universities that agree to share their enrollment data. On a student-level, undocumented students are excluded from the data, as are any students who may have opted out. IDEA conducts its own audit to verify and confirm that 100% of students have matriculated to college.

low-income.²⁰ IDEA students are overcoming these odds with 36% of IDEA’s class of 2010 graduating college in six years. With CSP funding support, IDEA can be an even bigger part of the student achievement solution by scaling its high-performing charter model to serve more low-income students and families in Texas.²¹

IDEA is also increasing the number of students who enroll in and graduate from college.

IDEA’s majority-educationally disadvantaged students are dramatically outperforming the state

average for college graduation for students from any socio-economic or academic background. Please refer to the table on page 18 for IDEA’s college persistence rates by graduating class.



(ii) IDEA Public Schools’ is a high-quality charter management organization

In its 18-year history, IDEA Public Schools has had **no school closures**²², **no charter revocations** for any reason, including noncompliance with statutory or regulatory requirements, and **no affiliations revoked or terminated**, including voluntarily. This is true for IDEA’s three

²⁰ <https://www.texastribune.org/education/public-education/8th-grade-cohorts/about/>

²¹ Texas enrolls 5,037,016 students, but only 247,236 of them (4.9%) attend an open-enrollment charter school. Source: <https://rptsvr1.tea.texas.gov/perfreport/snapshot/2016/state.html>

²² **Application Requirement O—NA: IDEA has not had any schools closed.**

charters authorized by the State of Texas and two in the State of Louisiana (authorized by East Baton Rouge Parish and Orleans Parish School Board). Although unforeseen at this time, should IDEA have issues in the future that result in IDEA schools being in danger of closing, IDEA leadership will work closely with parents and families to enroll their children in the nearest IDEA school that has no statutory or regulatory issues. (**Application Requirements B3 and E.**)

(iii) IDEA Public Schools manages its finances and operations with integrity

IDEA Public Schools has had **no significant issues in the area of financial or operational management or student safety** or other problems with statutory or regulatory compliance of any kind that could lead to revocation of the school’s charter. (See **Appendix I.15** for IDEA’s safety procedures and samples of operation oversight and centralized school supports.)

IDEA has also met the high bar of accessing the Permanent School Fund (PSF) bond program each year it has been available to public charter schools. To obtain access to this annual program, schools must show at least three consecutive years of financial audits with unqualified or unmodified opinions, receive an investment grade credit rating from a national agency, and maintain an academic rating of “Met Standard” from the Texas Education Agency. **Only 10% of Texas charter schools have met this bar**²³. As further proof of IDEA’s fitness to manage, the Texas Education Agency (TEA) has approved IDEA to expand its charter with additional schools (see **Appendix E**) every year for the past 13 years. As noted, IDEA received an unmodified opinion on the financial statements as a whole from independent auditors has a BBB+ investment grade credit rating from Standard & Poor’s (one out of only six charter

²³http://tea.texas.gov/Finance_and_Grants/Texas_Permanent_School_Fund/Texas_Permanent_School_Fund_-_Annual_Report/

schools in the U.S. to receive this high-rating), and received a 89% B grade for academic results from the Texas Education Agency. Additionally, TEA gave IDEA a rating of A: Superior under the Charter Financial Integrity Rating System (FIRST) of Texas and (see **Appendix H** for IDEA's FIRST report and full audited financials, **Application Requirement N**). IDEA's record of sound financial strength is further proven by its continued ability to issue debt in the bond market to secure facilities funding to support network growth.

B. IDEA SERVES EDUCATIONALLY DISADVANTAGED STUDENTS

(i) IDEA serves educationally disadvantaged students at comparable or higher rates than surrounding districts

IDEA's student population is 88.6% low-income and 36% ELL—a highly educationally disadvantaged student body. In addition, over half—50.7%—of all IDEA's students are considered at-risk of dropping out of school due to one or more social, economic, or academic factors. The following table shows data from the regions in which IDEA operates that draw students from the same neighborhoods as IDEA schools in those areas.

Indicator <small>Source: TEA TAPR reports 17 18</small>	Hispanic	White	Afr Amer	Econ Disadv	Special Ed	ELL
State of Texas	52.4%	27.8%	12.6%	58.8%	9.1%	18.8%
IDEA Public Schools – ALL	89.2%	3.9%	5.5%	88.6%	5.2%	36.0%
Region 1 (Rio Grande Valley)	97.4%	1.7%	0.4%	85.1%	7.7%	36.9%
Region 13 (Austin)	47.6%	37.0%	6.9%	45.5%	9.8%	17.3%
Region 19 (El Paso)	90.2%	5.6%	2.3%	74.3%	10.0%	26.8%
Region 20 (San Antonio)	69.3%	20.3%	6.0%	59.7%	9.8%	11.7%

Louisiana schools do not have comparable state data

As noted on page 6 and in **Appendix I.8**, over time, IDEA's Special Education population has increased at a higher rate than its overall enrollment, meaning IDEA continues to serve proportionally *more* Special Education students as the network grows. IDEA also believes that its comparably low numbers across all schools is due to the fact that IDEA's early interventions, individualized blended-learning approach, and overall high-quality programming and teacher

training has met students where they are and provided them with interventions that have actually *decreased* the rates at which they need intensive Special Education supports. In Austin, for example, IDEA has worked to exit students from Special Education, when warranted, based on the improvements they have demonstrated as a result of IDEA’s highly effective Critical Student Interventions (CSI) program

As is evident from data supplied on pages 22-27, IDEA’s contribution in assisting educationally disadvantaged students to graduate high school, matriculate to college and graduate from college career-ready is notable and impressive and includes multiple additional supports such as CSI, Catalyst, and Content Mastery (described on page 5, **Application Requirement L**). Again, see **Appendix I.7** for more detail on IDEA’s Special Education program.

The addresses of campuses in Schools Operated by the Applicant (**Appendix E**) verifies that IDEA has previously located its schools in low-income communities in order to improve outcomes for the most educationally disadvantaged—majority-minority populations, first-generation college attenders, and those living in poverty—yet welcomes students from all racial, educational, and economic backgrounds in alignment with its open-enrollment policy and future site selection plans.

(ii) IDEA recruits, enrolls, and effectively serves educationally disadvantaged students

Recruit. IDEA accepts all students through an **open-enrollment lottery** process (**Application Requirement J**; see also **Appendix I.16** for student **recruitment, selection, lottery, and admissions** policies) and **excludes no student due to emotional, physical, or learning disability or linguistic need** (**Application Requirement A1**).

Enroll. IDEA has been actively providing parents and caregivers with information about its specialized programs at its annual “Welcome to IDEA” events for new enrollees—one per year per school (see **Appendix I.17**). New IDEA parents are expressly invited to these on-campus events to learn about the IDEA instructional model, college-preparatory environment, school transportation, the district’s uniform policy, and the services IDEA provides for its special needs students (Special Education and ELL). Special Education teachers meet with incoming students and their families, and parents learn about how IDEA supports students with a variety of disabilities ranging from autism to cerebral palsy in its RISE (formerly Life Skills) classrooms (**Application Requirement K**), the number of which IDEA has expanded as more in-need students enroll. Those in need of occupational or physical therapy (provided at no charge) receive pull-out services as they do in all IDEA grade levels. Overall, IDEA has also seen a marked increase in its population of Special Education students qualifying for IEPs for emotional disorders and autism (**Appendix I.9**). The parents of students receiving life skills support have become vocal advocates for the IDEA special education program within the special needs communities and communicate with new life skills parents at Welcome to IDEA events, report card nights, and other school gatherings, creating a strong community within IDEA.

These events noted increased public access to information about the district’s special education program and parent coalition as does distribution of IDEA’s IMPACT magazine, produced in English and Spanish and mailed to 30,000 IDEA households. (See **Appendix I.18** for a recent article on a multi-day college field lesson for IDEA’s RISE students that includes testimonials from the students themselves. Articles like this one, also promoted on the IDEA website, provide valuable information for current and future parents. See also **Appendix I.19** for a highlight on one of IDEA’s RISE teachers.) IDEA publicizes its Special Education program by

highlighting students on social media as well as working with media to showcase this student group (see **Appendix I.20** for an article from The Monitor).

Effectively serve. Pre-K-2 students participate in the Direct Instruction program, which meets students where they are performing academically and works to quickly close their individual gaps while teaching to mastery. This approach brings students up to grade level, with a goal of advancing each student 1.5 years from where they begin and results in fewer Pre-K-2 students requiring Special Education services.

IDEA's ELL population is 36%—almost twice the ELL population across the entire state. To ensure all parents get adequate communication, IDEA sends printed information home, puts it online on the district/school websites, makes prerecorded calls, and/or emails families. **All materials sent to parents in print (for families without Internet access), online, or via email are offered in both English and Spanish.** See **Appendix I.21** for examples of information for families and screenshots of IDEA's online multilingual application system. **IDEA will continue to execute these tactics in each of the new regions proposed in this application.**

IDEA's Projected Educationally Disadvantaged Population at New Sites

For 2018-19, there are 40,691 students on IDEA waitlists across all regions²⁴ (see **Appendix I.22**). This unprecedented number means IDEA must continue to launch open-enrollment lottery charter schools to ensure that families in all target communities, from all backgrounds, have access to a high-quality public education. As an overall approach to expansion, IDEA meticulously researches community demographics including poverty rates, population growth patterns, and evidence of low performing neighborhood schools, giving these students the opportunity to attend a high-performing IDEA charter school. Once selected, the

²⁴ IDEA's lottery for fall 2018 enrollment was held on January 28, 2018.

IDEA teams sets to work to launch the new region (additional information in **Appendix I.3** details the process and milestones).

For this CSP grant, **IDEA will add 56 expansion schools and 38 replication schools.** This will add a total of 30,886 high-quality, open-enrollment charter school seats during the grant period (56,400 seats at full scale), which will dramatically increase the number of low-income college graduates from traditionally underserved communities in Texas, Louisiana, and Florida. The table below shows how IDEA will phase in these schools over the life of the CSP grant.

New Seats by Region	
Rio Grande Valley	5,286
San Antonio	5,842
Austin	4,380
EL Paso	3,938
SE Louisiana	2,016
Tarrant County	2,438
Permian Basin	1,996
Houston	2,994
Tampa	1,996
TOTAL	30,886

Number of Replication Schools of Each Type Per Grant Year							
Phase	School Type	2019-20	2020-21	2021-22	2022-23	2023-24	SCHOOLS
Year 0	Secondary	4	15				19
	Primary	4	15				19
Year 1	Secondary		4	15			19
	Primary		4	15			19
Year 2	Secondary			4	15		19
	Primary			4	15		19
Year 3	Secondary				4	15	19
	Primary				4	15	19
Total		8	38	38	30	30	

Number of Expansion Schools of Each Type Per Grant Year							
Phase	School Type	2019-20	2020-21	2021-22	2022-23	2023-24	SCHOOLS
Year 2	Secondary						0
	Primary		7				7
Year 3	Secondary		12	7	7		26
	Primary		5	14	7		26
Year 4	Secondary			14	7	7	28
	Primary			7	7	7	21
Year 5	Secondary				2		2
	Primary				2		2
Total		0	24	42	32	14	

By the end of this CSP funding period (2018-19 through 2022-23), IDEA will operate 199 schools in these nine regions as indicated:

Regions	SY 18-19	SY 19-20	SY 20-21	SY 21-22	SY 22-23
Lower RGV	16	18	22	22	24
Upper RGV	23	25	27	29	33
SA	22	24	29	33	37
Austin	10	14	18	22	26
El Paso	4	6	9	13	17
South Louisiana	4	6	10	14	16
Tarrant County	0	4	6	8	12
Houston	0	0	4	6	10
Permian	0	0	0	4	6
Tampa Bay	0	0	0	4	6
TBD	0	0	0	0	4
TBD	0	0	0	0	4
TBD	0	0	0	0	4
Number of Schools Grand Total	79	97	125	155	199

IDEA has always made it a priority to recruit and enroll educationally disadvantaged students, and it will continue to do so as the network expands to new regions and within existing ones. As IDEA expands into Tarrant County, Houston, and Tampa Bay it is hard at work in finding specific neighborhoods that experience low college-going rates, low academic performance, and high poverty levels. Wherever existing public schools are failing is an opportunity for new IDEA schools to make an impact. See **Appendix I.3** for examples of “heatmapping” IDEA has executed in new regions in order to serve educationally disadvantaged students. Further evidence of IDEA’s intention to serve disadvantaged students is the consistency of its demographics even as it has rapidly scaled and expanded. The table below provides “snapshots” every three years to illustrate trends²⁵.

Demographic Snapshot (Every 3 School Years)	2003-04	2006-07	2009-10	2012-13	2015-16	2018-19
Total Enrollment	499	2,073	5,515	12,567	23,525	44,653
African American	0.0%	0.5%	0.6%	1.1%	2.6%	5.5%
Hispanic	94.0%	91.9%	93.9%	95.4%	93.6%	89.2%
Economically Disadvantaged	82.2%	68.0%	77.6%	83.5%	89.1%	88.6%
English-language Learners	13.8%	31.2%	22.9%	26.4%	34.9%	32.9%
Special Education	5.2%	5.2%	3.9%	4.3%	4.7%	5.2%
At-risk	DNA	47.1%	40.5%	41.5%	49.4%	45.9%

That IDEA can grow at this rate while continuing to provide educationally disadvantaged students—100% of whom are accepted to college each year—with a high-quality, free public education is proof that IDEA’s carefully honed instructional and financial models work and should be expanded and replicated into new regions.

²⁵ Data sources are the Academic Excellence Indicator System (AEIS) Reports, recorded 2003-04 through 2011-12, and the Texas Academic Performance Reports (TAPR), recorded 2012-13 through the present. Data is collected the previous year and reported in the year indicated in the table header.

C. EVALUATION PLAN

Logic Model

The following graphic shows the resources and inputs, outputs, outcomes, and IDEA's ultimate long-term goal. For the complete logic model, including additional context for the need and demand for IDEA schools, please see **Appendix I.24**.

Resources and Inputs	Outputs	Outcomes	Long-term Goal
<p>Cutting-edge, consistent program model across schools enables rapid scaling</p> <p>Unprecedented programming to support students to and through college</p> <p>Partnership with local school district to reopen failing public schools as charters (Midland ISD, Ector County ISD)</p> <p>Human capital pathways develop and support great teachers and leaders</p> <p>Deep engagement with highest-need communities</p> <p>Performance management ensures organizational and individual goals aligned</p> <p>Strong operational and financial management with 6 years expanding at a 20% growth rate</p> <p>Feedback loop from evaluation team on growth impact in seven current communities</p>	<p>Achieve the mission at scale:</p> <ul style="list-style-type: none"> 79 schools with 44,653 students enrolled in 2018-19, growing to 199 schools with 103,184 students enrolled by 2022-23 <ul style="list-style-type: none"> 38 replication, 56 expansion schools and 30,886 students through 2019 CSP added over the 2019-2023 grant period (27k + students added outside of CSP) Diverse student population, including 88.6% of students with low socio-economic status 100% of students matriculate to an institution of higher education <p>Build a strong and sustainable organization:</p> <ul style="list-style-type: none"> 80% teacher retention 80% employee retention 97.5% average daily attendance 90% annual student persistence Superior FIRST rating on financials 	<p>Student growth:</p> <ul style="list-style-type: none"> An increase in percent of students who met or exceeded "student progress" measure as defined by the state 90% of students end the year on or above grade level in reading 90% of students end the year on or above grade level in language 90% of students end the year on or above grade level in math <p>Student achievement:</p> <ul style="list-style-type: none"> IDEA receives a grade of 93% from the state of Texas IDEA receives a grade of 80% from the state of Louisiana Average ACT score of 21.35 34% of graduates named AP Scholars <p>College matriculation and college success:</p> <ul style="list-style-type: none"> 100% of graduates accepted to a 4-year college or university 99% of graduates matriculate to college/university 37% of students graduate college in 4 years and 47% graduate in 6 years 	<p>IDEA becomes the largest educator of low-income college graduates in the state of Texas by producing 1,625 college graduates annually by 2024, as compared to the largest public school district in Texas producing approximately 1,500 college graduates</p> <p>Create transformational change for educationally disadvantaged students and underserved communities; IDEA alumni will earn approximated \$1M more over their lifetimes than the non-college going peers</p>

High-quality Evaluation Team and Evaluation Design

The aim of the evaluation plan is twofold: **1) To research and understand whether the supports in place for new schools are effective; and 2) To evaluate whether school model adaptations are implemented with fidelity to the IDEA core values.**

Previous experience. IDEA Public Schools is a seasoned veteran implementer of CSP grant projects, and the district continues to leverage learnings from previous (and current) CSP evaluations. From prior partnerships with outside evaluation firms, SRI (2014-2018) and Copia Consulting (2016-present) the following learnings were uncovered:

- These partnerships have helped IDEA Research and Analysis (R&A) personnel understand

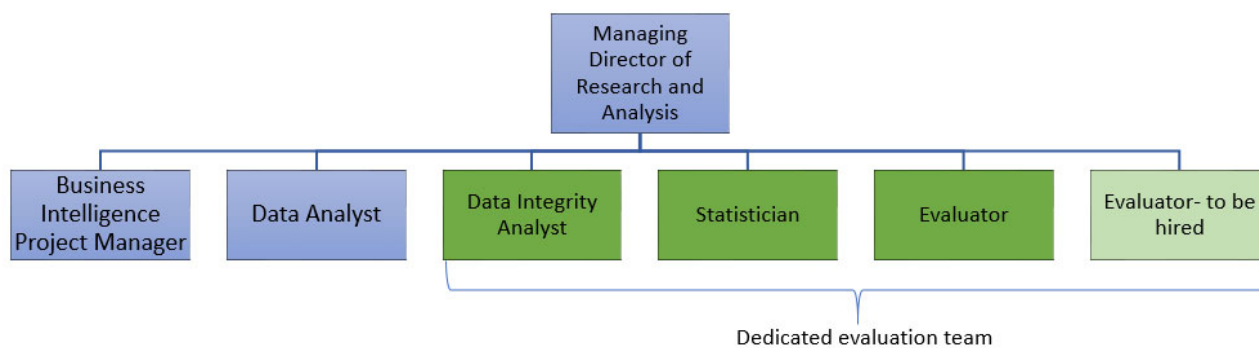
areas that require additional investigation, including such topics as staff satisfaction, staff development, and promotion; and

- These partnerships have deepened IDEA's understanding of areas of weakness in its growth strategy (e.g., staff satisfaction), helping IDEA revisit its replication and expansion strategy.

Given the findings of the evaluations' impact on the entirety of IDEA's model and growth, IDEA has developed a seasoned internal evaluation team (R&A) to scale rigorous, high quality evaluation within the organization. IDEA's R&A team, which reports to the Chief Program Officer, will make meaningful and useful recommendations determined by rigorous, evidence-based evaluation practices and use of institutional knowledge so that IDEA can iterate on its model to increase student academic achievement in increasingly diverse communities. IDEA continually seeks to better understand whether and how new replication schools implement the IDEA model and factors that facilitate or impede progress.

IDEA's high-quality Research & Analysis team. IDEA is creating a sustainable evaluation model by conducting evaluation work in-house and has made an organizational commitment to continue rigorous, high-quality program evaluation by expanding the network's **dedicated R&A team. The greatest benefit to using an internal evaluation team is IDEA's increased and ongoing access to real-time, actionable recommendations to inform program iterations and improve its model, thereby continuing to increase academic performance for students.** The following graphic depicts the org chart for this key internal department²⁶:

²⁶ Re: Business Intelligence Project Manager: IDEA's goal is to operationalize its recommendations for dashboard information. For example, if the R&A team recommends that campuses track results a certain way, the BI Manager will help manage and act as the



The lead investigator for this CSP project will be Danny McClain, who has served as IDEA’s Managing Director of Research and Analysis since 2012. In this role, Danny manages student achievement, state accountability, and program reporting for IDEA. He has developed State Accountability Projection Models and tracking tools, standardized student achievement reporting across all assessments, and realized a decrease in per-student costs every year. Danny also designed and developed the Principal Dashboard (a roll-up of school-based metrics for leaders to make data-informed academic decisions, such as prioritized teacher coaching), which saved IDEA over \$600,000 in personnel time spent collecting data in its first year alone. This huge savings in time meant IDEA’s leaders were able to focus more on producing data-driven outcomes than on the task of collecting and aggregating the data itself. Please see **Appendix B** for all R&A team member resumes.

Over the past year the R&A team has added two team members, both of whom are Harvard

stakeholder advocate with the software development team, making sure the operationalized solutions meet the recommendation requirement and stakeholder needs.

Strategic Data Project (SDP) Fellows²⁷ based out of the Center for Education Policy Research at Harvard University. **Rodrigo San Miguel** holds a Bachelor's degree in economics, a diploma in Applied Statistics, a Data Science Specialization, and a Master of Science in Systems Engineering. He is currently working as **Statistician** for IDEA Public Schools where he develops and executes statistical models and algorithms for all projects, disseminates research and evaluation findings via journals and other professional writing, shares learning with network leaders, and conducts analytical projects applying scientific methods and reasoning. Previous positions in other organizations include Data Science Consultant, Category Analyst, Teaching and Research Assistant, and a variety of additional analyst roles. **Dr. Lydia Killos** is an **Evaluator** on the R&A team with over 15 years of experience in high-quality program evaluation. Her individual responsibilities include leading the R&A team in evaluation design and methods and collaborating with IDEA leaders to design and develop an evidence-based, rigorous evaluation practice that is responsive to key questions and provides clear, specific and meaningful recommendations to meet organizational goals. Lydia has taught Research Methods and Evaluation Design at the university level and has extensive training in quantitative and qualitative methods. She has a strong record of peer-reviewed evaluation publications and is an Institute of Education Sciences (IES) Fellow. Please see her attached resume for a list of selected publications and presentations.

The R&A team is further rounded out by the following staff: Edison Coronado is IDEA's

²⁷ The SDP Fellowship is a highly competitive two-year professional development program that places data strategists in education agencies to immediately impact policy decisions that affect student outcomes.

Data Integrity Analyst. In this crucial role, Edison assists in evaluating IDEA’s organizational growth in order to ensure quality; designs, develops and implements data cleaning solutions for the network; and performs data extraction, transforming, and loading, then translating the data into analytics. His main focus is to evaluate programs and circumstances to bring insight to the IDEA network overall. Two additional **Evaluators** (to be hired—see **Appendix B** for job description), one of which will prioritize evaluation of growth in new regions (funded by this CSP grant), and one will prioritize evaluation of college success (a position already budgeted, but yet to be filled). When fully staffed, the evaluation arm of the R&A team will have three Evaluators, one Statistician and one Data Integrity Analyst, thereby providing a breadth and depth of capacity to continuously evaluate and improve the quality of results from ongoing expansion efforts.

As a veteran of several large-scale federal grant projects, IDEA has gradually been bringing the evaluation work in-house in order to benefit from full-time professional study of all aspects of data collection, analysis, and progress monitoring. Examples of evaluation projects completed or in progress include Healthy Kids Here ²⁸(IDEA’s innovative farm-to-school program funded by a 2013 Carol M. White Physical Education grant, for which R&A constructed a quasi-experimental design), and the School Culture project, an organization-wide initiative to map key student and school-level outcomes against a clear behavioral definition of IDEA school climate and culture, which can be measured along a standardized rubric. This evaluation project includes

²⁸ See <https://stories.chartergrowthfund.org/crossfit-and-kale-idea-public-schools-quest-to-improve-the-health-of-its-kids-852dc3bbbed>) and <https://www.ideapublicschools.org/news-events/the-revolutionary-idea-of-farm-to-school-programs>.

both qualitative and quantitative evaluation and a matched sample design. IDEA's in-house R&A team was also written into and is leading the work on its 2018 CSP grant.

The R&A team collects data on org-wide metrics (see page 41) on a quarterly basis and compares performance across each region (case studies, quasi-experimental designs) so network leaders can highlight best practices and offer support where it is needed. The team already has evidence-based evaluation plans and methods in place to measure and report on the following: **Student achievement, growth, and persistence** (year-over-year enrollment at IDEA and IHE); **Programmatic impact** (How do we structure new programs to measure impact? How do we use evidence-based practices and research in program design and development?); **Staff performance, training, skill assessment, and satisfaction, and retention/attrition** (What are the critical factors of teacher and staff selection? How can we reduce staff attrition?); and **Family experience and persistence** (What are the risk factors for families? How do the experiences of first year students and families factor into persistence? What is the role of family engagement in IDEA?). As a result, IDEA is able to constantly connect existing (and future) CSP evaluation work to other priority evaluation projects.

The 2019 CSP evaluation will accomplish the following: 1) Describe the replication of the IDEA school model in the new regions of Tarrant County/Fort Worth, Houston, the Permian Basin, Southeastern Louisiana, and Tampa Bay; 2) Identify and compare strategic elements of the network's expansion and sustainability with that of other regions; and 3) Compare and contrast teacher and student retention and college readiness outcomes between regions, as guided by the research questions (see following graphic).

Research Questions	
1)	To what extent do replication and expansion schools consistently implement key model elements as defined by IDEA leadership? How, if at all, does implementation of noted elements differ between Academy and College Prep campuses, by school maturity (years in operation) and region?
2)	What are replication and expansion schools' greatest needs for support? In what ways are challenges different based on regional differences?
3)	Which supports provided by IDEA HQ or regional offices facilitate the implementation of the IDEA model and in what ways? To what extent do the supports meet schools' needs? To what extent do the supports provided by IDEA HQ grow and expand both in capacity and focus as new schools and new regions become part of the organization?
4)	To what extent do replication and expansion schools build in sustainability strategies, and what is the nature of those strategies?
5)	To what extent are IDEA schools retaining students and ensuring college readiness? To what extent do these measures of progress vary by school, school maturity, and region?
6)	To what extent is the IDEA model dependent upon a specific school culture, and how does this vary from region to region? What are the determining factors of school culture?
7)	To what extent does IDEA's initiative to establish an internal evaluation/quality control team facilitate and improve growth and expansion?

Metrics

To achieve IDEA's theory of change (see corresponding **Logic Model**, page 35), replication efforts must be executed with incredible fidelity to the proven IDEA model and with an intentional focus on key organizational priorities. As it has done since 2005, the Senior Leadership Team (SLT) will track the following **organization-wide goals and targets, which also include the program performance measures (GPRA)** over the five-year project period; all tied to the individual goals of every IDEA professional²⁹:

GOAL 1: ACHIEVE COLLEGE-READY STUDENT RESULTS						
<i>Strategies: Replicate proven academic model; continuously gather and analyze quantitative data; provide individualized instruction and supports; provide AVID and ACT test preparation; all high school students take 11 AP courses; provide robust "to and through" college counseling and preparation activities</i>						
Objective Performance Measure	Baseline	2019-20	2020-21	2021-22	2022-23	2023-24
% of PK/K students on/above grade level in reading language math	90 90 90	90 90 90	90 90 90	90 90 90	90 90 90	90 90 90
District grade rating from the respective state	TX: 89% LA: 76.1%	TX: 90% LA: 76.3%	TX: 91% LA: 76.5%	TX: 92% LA: 76.7 %	TX: 92% LA: 76.9 %	TX: 93% LA: 80%
Average ACT score	21	21	21.05	21.15	21.25	21.35
% of graduates named AP scholars (3 scores of 3 or +)	24	26	28	30	32	34
% of graduates who are accepted to a college or univ.	100	100	100	100	100	100
% of graduates who matriculate to a college or univ.	99.88	99	99	99	99	99
% of students graduating college in 4 6 years	21 49	22 50.5	23 51.5	24 52.5	25 53.5	25 55
As required, IDEA will report annually on % of 4 and 8 grade charter schools students performing at or above the state level in mathematics and reading. Benchmark: 4 th - Math 81%, Reading 75%; 8 th - Math (Algebra 1) 92%, Reading 85%						

²⁹ Re: District grade ratings—IDEA will add benchmarks for FL schools when they open.

GOAL 2: BUILD A STRONG AND SUSTAINABLE ORGANIZATION						
<i>Strategies: Provide well-articulated Teacher Career Pathway; recognize and reward teaching excellence; measure and monitor staff satisfaction; implement a proven, tested financial and operational model; Focus on attendance to drive academic results so students are in the classroom</i>						
Objective Performance Measure	Baseline	2019-20	2020-21	2021-22	2022-23	2023-24
% Employee Retention	87	80	80	80	80	80
% Average Daily Attendance	97.7	97.5	97.5	97.5	97.5	97.5
Annual Surplus (in millions) to support financial strength and access to facilities funding	\$20	\$20	\$32	\$41	\$59	\$75
% Student Persistence (all students)	93.9	90	90	90	90	90
Will report annually on the federal cost/student for schools in operation 3+ years. Benchmark: \$1,301						

GOAL 3: ACHIEVE THE MISSION AT SCALE						
<i>Strategies: Replicate successes from prior expansion efforts and prior CSP grant awards. Use evaluation findings to iterate and improve from each launch. Place schools in neighborhoods that are mission-aligned.</i>						
Objective Performance Measure	Baseline	2019-20	2020-21	2021-22	2022-23	2023-24
Enrollment (increase by 58,520 students)	44,480	53,100	66,000	82,000	103,000	125,100
CSP-funded schools in operation (56 expansion/38 replication schools opened)	--	0 8	24 38	42 38	32 30	14 30
Total schools in operation	79	97	125	155	199	233
% of students with low socio-economic status	88.6	80	80	80	80	80

Data types, instruments and systems, and frequency of data analysis as follows:

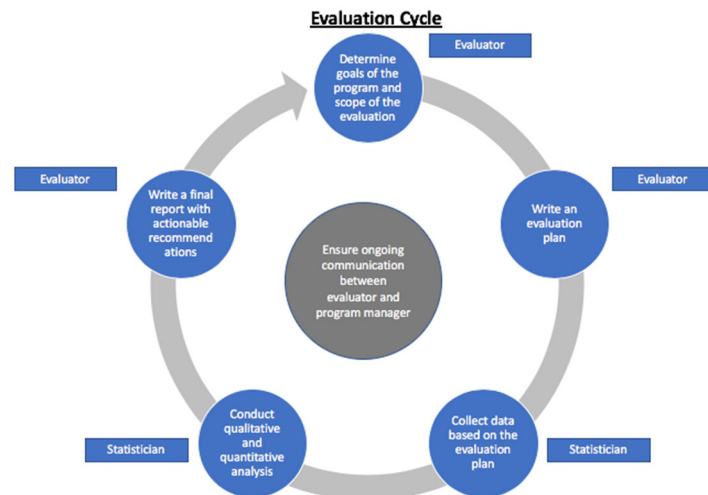
Goal/Metrics	Data Type	Instruments/Systems	Frequency
Goal 1, all metrics	Student achievement data, including college readiness	Diagnostics for Math and ELA Reading Level Interim Assessments ACT, AP, STAAR and EOC tests	BOY, MOY, EOY Weekly Quarterly Annually
Goal 1, all metrics	College application, financial aid, enrollment, matriculation, persistence	Naviance, National Clearinghouse	Weekly for high school juniors, seniors, each semester for alumni
Goals 1 and 2, all metrics	School and district achievement: State rating, AP Scholars, teacher retention, attendance, student persistence	Public Education Information Management System (PEIMS); College Board (AP); HR records; student enrollment	Daily (attendance); annually (all other metrics); also regular check-ins on progress toward annual goals
Goals 2 and 3, all metrics	School and district operations, including staffing, facilities, Child Nutrition Program fund balance, and transportation	Inventory; financial health; organizational health; HR records	Monthly (budget vs. actuals); annually (all other metrics)

The timeline for producing reports is as follows: **Quarterly:** Collect formative data to facilitate decision-making; **Annually:** Produce an annual evaluation report on all project components, including preliminary and key findings, an explanation of changes in goals, objectives, and methodology; and planned products or publications; and **End of Grant Period:** Cumulative final report summarizing the results of the entire CSP expansion project. The team's dissemination plan for sharing learning includes Charter School Growth Fund convenings, webinars, practitioner briefs, and policy briefs as well as through annual Project Director

meetings and site visits hosted in IDEA’s various regions. IDEA will also share information through its Scaling Up Institute (see **Appendix I.25**), an experiential professional development program designed to accelerate the growth and academic impact of charters across the country. The six-month program is open to charter schools and traditional public schools and convenes cohorts of 5-6 executive teams at three in-person workshops centered around an Action Learning Project (ALP) - a transformative, mission critical initiative that increases student outcomes. At IDEA, the ALP model has launched over 75 initiatives in the last 7 years.

Research Design Overview

Evaluation cycle and data to be collected. In order to continue to learn through growth in new markets, IDEA will follow a robust evaluation cycle as depicted in the graphic at right. IDEA will use mixed qualitative and quantitative methods that produce an in-depth



understanding of IDEA’s growth strategy, lessons learned in replicating the IDEA model, and descriptive analyses of IDEA student outcomes. Qualitative research methods will include surveys, focus groups, interviews involving IDEA leadership, teachers, parents and students, as well as observations of key program activities such as teacher training, classroom instruction and parent engagement activities. Descriptions of key research components follow.

Case Study of IDEA Centralized Supports. Annual interviews with IDEA leadership and regional office staff and a review of strategic and planning documents will contribute to a

longitudinal case study examining how central and regional functions (described on page 48) evolve in response to specific replication and expansion schools' needs. The 2019 study will also illuminate issues of scale as IDEA increases from 79 to 199 schools during the grant period. IDEA will utilize data and interview information collected from the 2014, 2016, and 2018 CSP studies so as not to be redundant.

Site Visits of Replication, Expansion, and Mature Schools. IDEA's internal evaluation team will conduct site visits to mature, expansion and replication schools in years 2-5, expanding the sample as new schools are established while the R&A team ensures there is no overlap with existing studies to enable the widest scope of review and recommendations so that IDEA can iterate on its model, ever increasing student academic achievement in growingly diverse communities. Site visit activities will include interviews and focus groups with key school stakeholders [i.e., leadership, teachers, students, and parents] and classroom walkthroughs to better understand whether and how the replication schools implement the IDEA model, and the factors that facilitate or impede their progress.

Teacher and Student Surveys. IDEA will continue to develop and iterate on survey items measuring key constructs related to the IDEA school model and growth strategy for new campuses and will compare information gathered to that from other campuses established earlier, with the goal of determining whether the new schools are having a more positive experience and encountering fewer obstacles to navigate. To minimize burden on IDEA, survey items will be integrated with IDEA's annual teacher and student surveys in years 2, 3, and 4. R&A staff will identify relevant valid and reliable teacher survey scales such as school leadership, instructional practices, teacher-student relationship, and school and district culture, and student survey scales such as their sense of college preparedness, school climate, and academic orientation from

existing surveys. The team will then utilize these tools to analyze descriptive statistics of the survey scales and other applicable items by school maturity, elementary/secondary levels, and region in the current project's study.

Descriptive Student Outcomes Analysis. In years 3, 4, and 5, once the earliest replication sites under the grant have been operating for two years, IDEA's R&A team will analyze teacher retention and efficacy metrics, student attendance, persistence, and performance on benchmark exams. They will also analyze test data by school maturity, region, and student subpopulations to compare school-level results to schools serving similar students in the IDEA regions.

Performance feedback and periodic assessment of progress towards outcomes. The R&A team will provide formative feedback after completing site visits and surveys in years 2-5 to inform IDEA's expansion strategies, as well as summative reports describing implementation and performance data. Data collection, analysis and delivery will be conducted in several "rapid-cycle" sessions, in which the qualitative data collection, analysis and formative reporting all occur within a 30-day period. Because growth will continue beyond the CSP grant period, it is important that IDEA build systems that provide a rapid cycle of both qualitative and quantitative data collection and analysis so they can respond to and resolve issues quickly, duplicate best practices across regions, and ensure that all IDEA schools meet IDEA standards.

Each report will include implementation findings, descriptive statistics associated with the proposed measures and the impact analysis for the student and teacher cohorts. In the last year of the grant, the cumulative findings on lessons learned about charter school expansion and replication will be shared with practitioners, school and district leaders, and policymakers through a range of accessible products and in-person opportunities as noted on page 42.

IDEA's successful project evaluation experience demonstrates a commitment to

implementing programs with fidelity, improving its practice, and documenting the results such that others can learn from IDEA’s experiences. The continued investment in the R&A team also signifies the value IDEA places on data-driven decision-making and on conducting high-quality, systematic research that will produce high quality data to inform CMO-wide decision making and, ultimately, improve academic outcomes for its students.

D. MANAGEMENT PLAN AND PERSONNEL

(i) IDEA plan for sustaining the expanded charter schools after the grant period

IDEA Public Schools is a fiscally sound and responsible local education agency (LEA) with sufficient management capability—including a senior leadership team to support the rapid growth of its highly successful charter school model while steadily and simultaneously increasing student achievement. To meet its goals of scale (199 schools total by the 2022-223 school year) and quality (closing historic achievement gaps by increasing student achievement and outperforming state averages) the CMO provides schools with critical operational support during the start-up phase as summarized below.

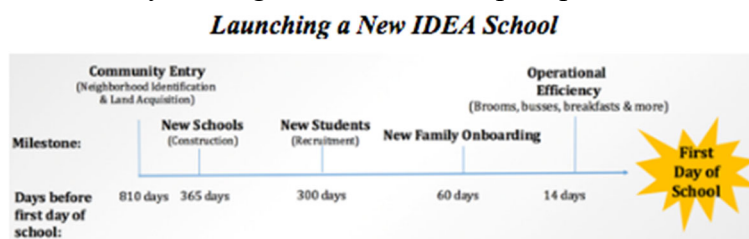
New School Start-Up Services. Successfully starting a school is a complex process, the success of which is contingent

upon the coordination of diverse

efforts. Each new school is

officially approved by the IDEA senior leadership team and the IDEA Board of Directors and authorized by the state charter authorizer 18 months in advance of scheduled opening. For new regions, IDEA begins laying the foundation with business, community, and philanthropic leaders up to 30 months in advance. (See page 54 for a detailed month-by-month launch schedule.)

Before approving the opening of additional schools, IDEA assesses the performance of



existing schools, the need/demand for future schools, and the capacity of the organization to support growth. Once that approval occurs with final sign-off by the Board of Directors, IDEA's Beginning of Year project team, a cross-functional team with a leader from every functional area, prepares and plans for the start of school to create a seamless launch of all schools. Please see **Appendix I.26** for Operations Checklist of new school start up tasks. **Application**

Requirement H.

With 79 schools currently in operation, IDEA has learned what things are necessary when launching schools and has created a "School in a Box" that has the tools and resources an Assistant Principal of Operations (APO) needs to successfully open a school (see **Appendix I.27** for Beginning of Year framework and plan). This kit contains these lessons learned and planning tools to help circumvent past mistakes and plan for a smooth launch. Likewise, IDEA's Principals in Residence (PIRs) work through a series of deliverables during their Rhodes Fellowship (see **Appendix I.28** for a sample plan) that are designed to articulate their academic and cultural school vision for the school they will soon lead. These activities, together with marketing support for teacher and student recruitment, stimulate community support by educating the community about IDEA and about school choice, initiate the student enrollment process, and prepare staff for operating the school. Community support takes many forms, including but not limited to engaging with neighborhood organizations, chambers, local movements (such as neighborhood revitalization efforts), and local leaders.

Facilities Acquisition

Due to lower labor cost and availability of land in the Valley, IDEA prefers to build its campuses from the ground up (greenfield) to control the quality of construction and the safety of its staff and students. In other regions, IDEA has and will continue to assume the same

approach, while being opportunistic when considering repurposing existing buildings (i.e., using existing schools that Louisiana districts are closing, converting a bowling alley into a school), as it is roughly 25% less expensive than building from the ground up in these regions.

IDEA's Chief Operating Officer oversees the acquisition and construction process, working with the regional Executive Directors and a third-party construction management consultant to assess locations for suitability for a school as well as the community to align with IDEA's mission. After a site is secured, the COO leads the public bid process for construction and contracts with a reputable construction firm after public bids.

Once the school is opened, IDEA's Director of Facilities (a member of the COO's team) is responsible for school maintenance. Each campus also has a Facilities Manager who manages custodial staff, interfaces with site-based contractors, and troubleshoots related issues. The Facilities Manager and custodial staff all have performance goals related to cleanliness of campus and the cost to maintain the campus per square foot, thus tying their performance reviews to specific, measurable goals and objectives. (See **Appendix I.29** for more detail on how IDEA efficiently manages its facilities.)

Strong, Supportive Regional and Central Offices

There are three strategic economic drivers that permit IDEA to operate efficiently while achieving unprecedented student achievement results: **1) We Invest in Teaching:** IDEA believes in investing more staff with direct teaching responsibility than in central office, administrative, and clerical and other support staff positions and seeks to be one of the top-paying districts in each of the regions it serves. **2) We Keep CMO Costs Down:** IDEA charges its Texas schools 8% in CMO fees annually (15% in Louisiana due to higher start-up costs and support, but this will decrease as IDEA adds more schools in this state and they build capacity to

self-sustain). **3) We Manage to High Standards:** A lean organizational structure, low CMO fee, and rigorous and specific performance goals at every level of the organization mean that IDEA gets excellent academic results with considerably less overhead than many other school districts.

Regional Support Structure. In 2012, IDEA created a regional support structure led by staff who report to IDEA’s Co-Founder and Superintendent, JoAnn Gama. New regions are led by an Executive Director until they grow large enough to justify the addition of a Senior Vice President of Schools position. Regional leaders work closely with IDEA HQ leaders to provide academic, financial, and operational support to all schools.

Managing the Quality and Consistency of the Academic Program. IDEA’s program and data team provides system-wide tools to measure academic achievement and overall school effectiveness to ensure quality control. IDEA’s VPs of Schools manage and work with the Executive Directors and Superintendent to ensure course-corrections are implemented when needed. The CMO provides a common curricular framework, student assessment system, and the training needed for effective implementation of the IDEA model; the academic counseling team provides detailed analysis of interim assessment data and training on how to use this data to inform classroom instruction and individual student intervention/remediation when necessary; the college counseling and college success teams provide training and monitor implementation of the college placement and college counseling model, and sees graduates through college in a truly Pre-K-16 program model.

Operational Support. Unlike standalone charters, IDEA schools benefit from the support of

being in a system. The CMO provides services for cafeteria, transportation³⁰, textbooks, materials and equipment purchasing, information technology infrastructure, and information management systems. This minimizes administrative bureaucracy for principals and teachers. CMO staff provides support to the schools in areas of their functional expertise. The operations team also oversees an in house software development team and a wellness team focused on making IDEA one of the healthiest and most sustainable school districts in the country. IDEA's cafeteria program generates a surplus of revenue at mature campuses allowing them to support the funding of cafeteria equipment and startup costs at new IDEA schools. See **Appendix I.30** for information on IDEA's unique cafeteria funding program.

It is important to note that operational efficiencies in IDEA's operation of its Child Nutrition Program have enabled it to support a school-based farm program (three farms in the Rio Grande Valley and one in Central Texas) that grows over 12,000 pounds of produce (currently kale, tomatoes, onions, potatoes, cabbage, and peppers) that go directly to IDEA's school cafeterias, providing students with locally grown organic vegetables. Please see the "Operations Efficiency Meets Innovation" in **Appendix I.31** for more information on this innovative program and how it is impacting student instruction as well.

Financial Support and Oversight. All budgets are approved and salary schedules are set by the CMO, though school leaders are given a degree of flexibility and autonomy to ensure they can recruit and retain the best teaching talent. The CMO provides the financial accounting software (Tyler Munis) used by each campus, which directly rolls up to the central system to

³⁰ IDEA provides transportation for students who live more than two miles from their enrolled school. **Application Requirement A2.**

monitor and advise on campus budgets. The CMO ensures that school budgets are modified and adjusted as specific conditions warrant. To the extent that schools are not meeting financial and academic performance targets, the central office will take an assertive role to make changes necessary to ensure school success.

The Finance Committee meets monthly and reviews IDEA's monthly financials. Closing occurs on the 10th business day of each month. The Board reviews financial reporting on a quarterly basis. The Board and Finance Committee also review the proposed budget in depth at Board "early-look" meetings each year. IDEA's internal audit team includes an Audit Manager and Auditor who report directly to the Board and provide interim updates and full reports upon the completion of each internal audit. Internal auditing is continuous with federal grant audits always concluding by the end of April. External audit starts last Monday in July and end on August 31st. The Board accepts the audit at the September board meeting.

Ensuring Effective Governance and Oversight

Because IDEA Public Schools is both a nonprofit and a public school system, the board's role is a hybrid of a traditional nonprofit board and the compliance requirements associated with a traditional public school board. The governing board has fiduciary responsibility for the organization and provides oversight and governance to ensure that IDEA Public Schools is achieving its organizational goals and priorities, thereby ultimately ensuring that IDEA is effectively preparing students for college success. The regional boards also play an important role in community engagement and fundraising. (See **Appendix I.32.**)

Currently, there is one governing board to perform the fiduciary and governance functions for the organization as a whole and oversee the Senior Leadership team and the Chief Executive Officer directly. However, it has always been incredibly important that IDEA board members

provide the local context needed for IDEA to be impactful in multiple communities. For this reason, IDEA also builds high-quality regional boards for each Texas and Florida region. The regional advisory boards lead community engagement, the development of local partnerships, and fundraising. A representative from each regional board sits on the governing board to provide regional context. In Louisiana, IDEA will have a board for each parish in which it establishes schools (in Baton Rouge and New Orleans), and those boards will create Resource Committees to identify and provide similar supports.

Parent Input and Voice. IDEA regularly solicits and considers input from parents on the implementation and operations of each school through surveys, focus groups, informal interviews, and feedback gathered from school-based events. (**Application Requirement I.** See **Appendix I.33**, Parent Engagement Plan.) When IDEA enters a new community, leaders also make special efforts to inform parents with community-specific marketing materials (see **Appendix I.34**). Additionally, IDEA establishes a Parent Advisory Council (PAC) per region (**Application Requirement I**; see also **Appendix I.35**) composed of one parent representative from each school in that region (example: 22 schools in San Antonio = one regional PAC with 22 parent representatives). Parents are self-nominated or can be nominated by a member of their campus. Meetings occur at least twice annually, and childcare is provided. Across all regions, IDEA received more than 300 applications from prospective PAC reps. The purpose of these PACs is to build a small, region-based community of parents with whom IDEA can consult on a variety of different parent-facing solutions prior to their launch. With the input of these representative partners, IDEA can better align its organizational decisions with the needs of this key stakeholder group. Lastly, a teacher’s evaluation also includes a family survey component to ensure all teachers are working with parents for the benefit of each child.

IDEA's financial and operating model; stakeholder commitment and support

IDEA's business office manages financial operations, which are critical to the day-to-day function of network schools and the sustainability of the organization itself. The business office maintains a dual focus on 1) customer satisfaction by attaining highly satisfied customers through a proactive response to customer needs; and 2) efficiency through an effective and systematic financial management approach.

IDEA is one of only six charter schools in the nation to have received an investment grade credit rating of BBB+ Stable Outlook with Standard & Poor's. IDEA's Texas Permanent School Fund (PSF) Guarantee application for \$200 million in new money and refunding was approved in the spring 2018 by the State of Texas. IDEA funds construction costs by issuing bonds, and this guarantee and PSF's AAA rating, backed by the state, will save IDEA roughly \$15 million over the life of the bond due to lower interest costs. IDEA's 2017-18 FIRST rating (Financial Integrity Rating System of Texas) from TEA was "A-Superior" with a score of 92 (passing score was 60). See **Appendix H** for IDEA's FIRST Rating report.

IDEA has a proven model that is effective and efficient. **On average, each IDEA campus achieves public funding solvency in its third year after opening.** For details regarding the total funding gap and phase-in process, see the Budget Narrative. See also **Appendix H**.

FUNDING GAP* FOR REPLICATION AND EXPANSION SCHOOLS BY SCHOOL TYPE AND BY GRANT YEAR								
Phase	School Type	Annual Gap	Annual Gap for Schools of Each Type					Total Gap
		Per School	Grant Year 1	Grant Year 2	Grant Year 3	Grant Year 4	Grant Year 5	
Year 0	Secondary	-\$573,804	-\$2,295,215	-\$8,607,056	\$0	\$0	\$0	-\$10,902,271
	Primary	-\$1,721,411	-\$6,885,645	-\$25,821,169	\$0	\$0	\$0	-\$32,706,814
Year 1	Secondary	-\$220,591	\$0	-\$882,364	-\$3,308,865	\$0	\$0	-\$4,191,229
	Primary	-\$661,773	\$0	-\$2,647,092	-\$9,926,595	\$0	\$0	-\$12,573,687
Year 2	Secondary	-\$63,189	\$0	\$0	-\$252,756	-\$947,835	\$0	-\$1,200,591
	Primary	-\$189,567	\$0	\$0	-\$758,268	-\$2,843,505	\$0	-\$3,601,773
Total			-\$9,180,860	-\$37,957,681	-\$14,246,484	-\$3,791,340	\$0	-\$65,176,365

*This gap also includes support services provided to schools managed at the regional level.

Demonstrated Commitment of Current and Future Partners

Over the past eighteen years, IDEA has consistently outperformed state and district averages

on objective measures of student achievement, drawing regional, state, and national attention and awards. These honors have afforded IDEA the ability to enlist strong stakeholder support from individuals, corporations, and foundations locally, regionally and nationally. In addition to the CSP grants awarded in 2010, 2014, 2016, and 2017, IDEA has raised over \$118M from the following investors, all of whom are energized and inspired by the growth and achievement of IDEA Public Schools and many of whom have renewed their commitments with IDEA to fund the 2022 expansion. Top lifetime gifts are as follows: Texas Education Agency—competitive grants to fund program innovation: \$12,798,255; Charter School Growth Fund: \$22,500,000; Ewing Halsell Foundation: \$15,505,000; Laura and John Arnold: \$10,000,000; Michael and Susan Dell: \$7,750,000; Sid Richardson Foundation: \$7,000,000; Kleinheinz Capital Partners: \$7,000,000; Council on Regional Economic Expansion and Educational Development (CREEED): \$7,000,000; Walton Family Foundation: \$5,000,000; Bill and Melinda Gates: \$4,298,721; Brown Foundation: \$1,505,000; Rainwater Charitable Foundation: \$1,500,000; George W. Brackenridge Foundation: \$1,005,000; KLE Foundation: \$17,932,400. Please see letters of support from selected donors, community leaders, and elected officials in **Appendix C**.

(ii) IDEA’s CSP project management plan, key personnel responsibilities, and timelines and milestones for accomplishing project tasks

IDEA will achieve the objectives of the proposed project on time and on budget with established processes and an experienced management team. Please see the table provided in **Appendix I.36** that illustrates the timeline of key **project management activities** and positions responsible. See also the following graphic for a complete timeline of **major school launch activities** by month (beginning 30 months prior to launch) and by team responsible. For additional activities and information on IDEA’s audit dates, please see page 50.

Deadline (Year based on months from launch)	# Months from Launch	Major Launch Activity	Team Responsible
JAN 31	30	New Region Approved by Chiefs	Growth
		1/3 Philanthropy Committed	Advancement
FEB 28	29	Board Confirms New Region	Growth
		Executive Director (ED) Hired for New Region	Human Assets
MAR 31	28	Board Members Recruited	Local ED
		Board Meets to Incorporate	Local ED
APR 30	27	Land Identified for All New Schools	Operations
MAY 31	26	PR Announcement for New Region	Operations
		Principals in Residence (PIRs) Identified for New Region	Human Assets
JUL 31	24	PIRs Begin as Full-time Staff	Human Assets
SEP 30	22	Founding Teacher Fellows Recruitment Begins	Human Assets
NOV 30	20	Land Closed	Operations
DEC 31	19	PIRs Selected as Principals for schools set to open next school-year	Human Assets
JAN 31	18	2/3 Philanthropy Committed	Advancement
		Auxiliary Plan for Transportation Services	Operations
		Design Begins	Operations
FEB 28	17	Auxiliary Plan for Health Services	Operations
MAR 31	16	100% Funds Committed	Advancement
		Auxiliary Plan for Child Nutrition Services	Operations
		Texas Charter Amendment Submissions	Finance
		Zoning and Entitlement Process Begins	Operations
MAY 31	14	Auxiliary Plan for Beginning of Year Projects Initiated (see Appendix I.27 for project plan)	Operations
		Auxiliary Plan for Logistics Services Initiated	Operations
		Next Cohort of PIRs Identified	Human Assets
JUN 30	13	All Funds from New Regions Deposited for Operating Budget	Finance
JUL 31	12	Regional School Operations Staff Hired	Operations
		Construction Begins	Operations
		Texas Financing Secured	Finance
		Founding Teacher Fellows Begin	Human Assets
		Human Assets Regional Staff Begin	Human Assets
AUG 31	11	Marketing Begins Recruitment Campaigns	Operations
SEP 30	10	Teacher Recruitment Launches	Human Assets
		Financial Model Update	Finance
		Student Recruitment Plan Initiated (7 Month Campaign)	Operations
DEC 31	7	PIRs Selected as Principals for next round of school openings (year 2 of grant)	Human Assets
JAN 31	6	Teacher Interviews Begin	Human Assets
		Principals Launching New Schools Become Rhodes Fellows to Plan School Vision via Training/ Professional Development Cohort	Human Assets
FEB 28	5	Lottery Held	Operations
MAY 31	2	Teachers Hired	Human Assets
		Welcome to IDEA Event	Operations
		6 th Grade Culture Camp Program Completed	Achievement
JUN 30	1	Student Registration	Operations

Deadline (Year based on months from launch)	# Months from Launch	Major Launch Activity	Team Responsible
		New Employee Onboarding Begins for All New Regional Staff	Human Assets
AUG 15	0	SCHOOL OPENS	

To facilitate program evaluation, the Project Director, in partnership with the Research and Evaluation Team will communicate with the district’s Senior Leadership Team and others in supporting roles to gather, analyze, and report on data to measure **progress toward project goals, objectives, and outcomes.**

(iii) IDEA’s highly qualified, experienced project team

IDEA’s **Budget Analyst, Armando Perez**, will serve as the 2019 CSP Project Director. Armando has extensive experience overseeing and reporting on multi-million dollar, multi-year federal, state, and philanthropic grants awarded to IDEA and works closely with IDEA’s Growth Team. Armando will report directly to the **VP of Financial Planning, Leanne Hernandez**, who has overseen the successful management of the 2014, 2016, and 2018 CSP grants, lead by Armando, as well as IDEA’s bond issuance and financial planning for the IDEA network. In his role, Armando oversees more than \$100 million in grant funds and is responsible for ensuring the proper stewardship of federal funds which can be seen, for example, in last year’s audit where no findings were found on any federal grants. Through strategies like internal audits of grant expenses, procurement procedures, creating of annual budgets and attending federal grant director meetings, Armando will continue to manage the 2019 CSP grant with fidelity as he has previously. IDEA’s highly qualified Research and Evaluation team will provide comprehensive evaluation services for this CSP initiative. Please see Section C for this team’s qualifications, and see **Appendix B** for bios and resumes of all key program and network staff.

Unique to IDEA and its grant management model is the **GrantEd Team**, which seeks to ensure that all grant managers at IDEA Public Schools have the tools, resources, and knowledge to ensure fidelity of program implementation and financial management of grant funded projects across the district. GrantEd is a team of nine grant managers who meet quarterly to problem-solve, share best practices in grant management, and learn from one another's projects and efforts. Led and coached by IDEA's Grants Director and supported by IDEA's Business Office leaders, this group has been highlighted multiple times at US Dept. of Education conferences. GrantEd also teaches grant managers ethics in decision-making, strategic budget planning, and navigating partnerships. Together, the GrantEd Team supports the management and implementation of 14 state, federal competitive, and federal formula grants totaling \$130M in awarded funds.

At all stages of project implementation and management, the Project Director will oversee adherence to all policies and procedures relating to the following: maintaining fiduciary and financial responsibility for all grant activities; keeping accurate accounting data, records, and archiving of supporting documentation for all charges; preparing and submitting written expenditure reports in coordination with the project manager; certifying expenses are true and correct; classifying and reporting the accounting transactions properly; and procurement records. The Project Director will maintain membership on the GrantEd Team for grant management-related professional development.

The Project Director will be supported by the following key staff at IDEA:

JoAnn Gama, IDEA Co-founder and Superintendent, supports the leadership teams in all IDEA schools as they implement the instructional program by managing regional Executive Directors. This team is responsible for creating a strategy to ensure school-level goals are met

and for training school personnel to ensure they are on track to reach their goals. JoAnn received the prestigious Peter Jennings Award for Civic Leadership in 2009, was appointed to President Barack Obama’s White House Commission on Educational Excellence for Hispanics in 2010 and was inducted into the National Charter School Hall of Fame in 2018. As cofounder, JoAnn has served IDEA for 18 years and has held the role of superintendent for the past six years.

IDEA has a robust **Program Team** managed by the **Chief Program Officer, Dolores Gonzales**, which works directly with campus leadership teams as well as classroom teachers and provides curriculum, assessment, instructional resources, instructional coaching, and support for all students, with a focus on improving services to special populations. Dolores was recently recognized by Education Week (2017 Leaders to Learn From) for “Leadership in Preparing All Students for College.” She has served IDEA for 13 years, including 7 years in her current role.

Irma Muñoz is the Chief Operating Officer and her team oversees several functions: marketing and communications, student recruitment, information technology, data management, transportation, child nutrition, facilities maintenance, school operations and construction. This team drives strategic development centrally for these functions and supports execution at the school level. They negotiate contracts, provide technical training, and build management capacity to ensure efficiency and allow the school teams to invest more time on instruction. Irma has held leadership positions at the Fannie Mae, GMAC Financial, and the World Bank, where her projects involved the development of a securitization platform, housing finance, and policy in a variety of Latin American countries and led to the issuance of those countries’ first mortgage-backed securities and, ultimately, the establishment of a secondary mortgage market. Irma has served IDEA for 10 years, including 9 years in her current role, she is a graduate of the Kennedy school at Harvard.

Jamey Roberts, Chief Human Assets Officer, leads IDEA’s human capital strategy and work. This includes hiring the highest quality staff members, supporting employee professional growth, and retaining IDEA’s talented staff, including overseeing its innovative Teacher Career Pathway which recognizes and rewards IDEA’s most effective teachers. Jamey is a graduate Northwestern University and Oxford University. Prior to joining IDEA, Jamey served as the Vice President of Talent & Engagement at the National Association of Charter School Authorizers (NACSA), where he led the organization’s human capital strategy to recruit, train, and develop new and current high-potential leaders in charter school authorizing. He also oversaw NACSA’s membership program, annual conference, and engagement strategy to improve authorizing practices across the country. Jamey started in education reform at The New Teacher Project, where he worked in a variety of roles, including five years as a Partner overseeing multiple engagements focused on improving teacher effectiveness in some of the nation’s largest urban school districts, including Chicago, Denver, Miami, and Indianapolis. Jamey has served IDEA for 4 years, all of them in his current role.

Wyatt Truscheit, the Chief Financial Officer, oversees the business office. In this role, Wyatt is responsible for all aspects of IDEA’s financial operations, including capital markets, banking and treasury, financial and management accounting, financial reporting, budgeting, payroll, benefits administration, procurement, risk management, human resources administration, and financial regulatory compliance. As CFO, Wyatt is charged with managing public offerings in excess of \$300,000,000 in bond financing and maintaining IDEA’s bond rating based on the Permanent School Fund to secure facilities funding since this is not accessible via the State. He also chairs the Budget and Finance Committee of the IDEA Board of Directors. Wyatt has served IDEA for 10 years, all of them in his current role.

Dr. Sam Goessling, Chief Advancement Officer, leads private and public fundraising and donor relations. Sam is a previous IDEA teacher and high school principal, he received his Master's in education leadership from Harvard and his Doctorate from the University of Texas at Austin. This team identifies mission-aligned communities for expansion, raises private philanthropic support, manages external and community relations with donors, elected officials, government agencies, and is ultimately charged with funding the growth of the network of schools to 199 schools by 2022-23. Sam oversees more than \$180M in grant funds awarded to IDEA in recent years. Sam has served IDEA for 12 years, including six years in his current role.

Phillip Garza, Chief College and Diversity Officer, sets the vision and strategy for everything IDEA does to send its diverse student body to and through college while consciously growing a diverse organization reflective of the communities IDEA serves. Phillip has served IDEA for 7 years, including 3 years in his current role.

In addition to these senior leaders, this CSP project is supported by high-quality **Executive Directors** in each region. Please see **Appendix B** for the Executive Director job description as well as for their resumes and an organizational chart detailing regional support at scale.