

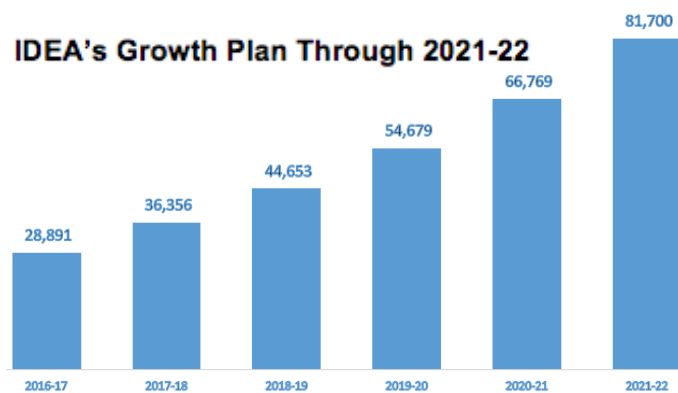
## Table of Contents

<b>Absolute Priority 1—Low-income Demographic .....</b>	<b>1</b>
<b>Competitive Preference Priority 1—IDEA Promotes Diversity .....</b>	<b>3</b>
<b>A. IDEA PUBLIC SCHOOLS: A HIGH-QUALITY CSP APPLICANT .....</b>	<b>9</b>
(1) IDEA increases academic achievement and graduation for all students .....	20
(2) IDEA produces outstanding results for educationally disadvantaged students.....	23
(3) IDEA has had no financial, operational, statutory, regulatory, or safety issues .....	26
<b>B. IDEA SERVES EDUCATIONALLY DISADVANTAGED STUDENTS .....</b>	<b>27</b>
(1) IDEA Serves Educationally Disadvantaged Students at Comparable or Higher Rates Than Surrounding Districts.....	27
(2) IDEA Recruits and Enrolls Educationally Disadvantaged Students .....	28
IDEA’s Projected Educationally Disadvantaged Population at New Sites .....	30
IDEA Individualizes Instruction for Educationally Disadvantaged Students .....	33
IDEA Gets Educationally Disadvantaged Students College and Career Ready .....	35
<b>C. EVALUATION PLAN .....</b>	<b>36</b>
Metrics.....	36
Internal Evaluation Staff and External, Independent Evaluation Contractors .....	37
Research Design Overview .....	40
<b>D. MANAGEMENT PLAN AND PERSONNEL .....</b>	<b>43</b>
(i) IDEA’s CSP project management responsibilities, timelines, and milestones .....	44
(ii) IDEA’s highly qualified, experienced project team .....	46
(iii) IDEA’s business plan for improving, sustaining, and ensuring the quality and performance of charter schools beyond the initial period of Federal funding .....	49
IDEA’s financial and operating model; stakeholder commitment and support .....	59
Demonstrated Commitment of Current and Future Partners.....	60

## Absolute Priority 1—Low-income Demographic

**IDEA Public Schools, which currently serves a student population across Texas that is 88.6% economically disadvantaged<sup>1</sup>, will use CSP funding to further expand in Austin, the Rio Grande Valley, and San Antonio and will replicate its model in a new Texas region: Tarrant County/Fort Worth<sup>2</sup>.** Over the next five years, the IDEA network will grow its high-performing CMO from 51 to 143 schools and will increase the number of low-income, high-needs students it serves from the 29,334 currently enrolled to a projected 81,700 by the end of the CSP funding period in 2021-22.

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 fastest-growing network of tuition-free, Pre-K-12 public charter schools in the United States.** 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.2 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.** IDEA's big goal is to serve 100,000 students by 2022. CSP funding provides key support in fulfilling IDEA's strategic plan and will help it grow to 81,700 students by 2021.

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

<sup>2</sup> IDEA schools in Baton Rouge, LA are being funded by a 2016 CSP grant.

Austin, TX was IDEA Public Schools' first expansion city outside of the Rio Grande Valley where IDEA was founded. Educational attainment is relatively low in the east side of Austin, particularly for students from low income backgrounds. Only 5.5% of Austin students from low income backgrounds graduate from college<sup>3</sup>, and 90% of IDEA students in Austin receive free or reduced price meals, a number that mirrors nearby local schools.

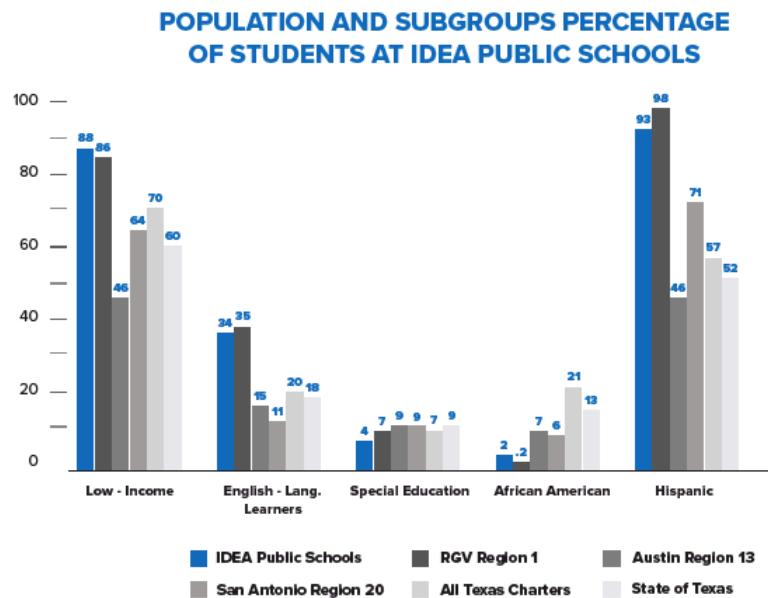
IDEA has intentionally and strategically located its schools in low-income, primarily minority communities and sends 100% of its graduates to college every year, 2/3 of whom will be the first in their families to earn a college degree. Not only does this fundamentally change the trajectory of lives for 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. IDEA also intends to diversify by design, both within existing regions and as it moves into new regions as well. For example, IDEA's Austin schools 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.3), which includes Diversity, Equity, and Inclusion strategies. IDEA will apply these strategies, and activities across all new regions as well. IDEA understands that school location is key to serving the broader range of diversity IDEA wishes to attract.

---

<sup>3</sup> "Higher Ed Outcomes: Travis County" Texas Tribune.

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

In keeping with this vision, IDEA will locate its schools in high-need communities as it expands to Tarrant County/ Fort Worth (see Appendix I.4 for IDEA’s growth site selection rubric), maintaining a low-income student population that is significantly higher than the 60% threshold required by CSP guidelines.



### Competitive Preference Priority 1—IDEA Promotes Diversity

IDEA Public Schools is an open-enrollment charter management organization, currently operating 51 schools where students enroll after being chosen by lottery. **IDEA is a high-quality CMO** as evidenced by its strong academic results, including student growth (see page 20); its strong safety, financial, and operational history (see page 26); its demonstrated success in increasing student achievement, including graduation rates (see page 23); and its demonstrated success in increasing student academic achievement by subgroup (see page 25). 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 93% Hispanic, 3.2% African American, 2.9% white, and 1% other races and ethnicities.

**Racial and Economic Diversity.** IDEA’s student populations reflect the demographics of the communities in which they are located. Additionally, IDEA 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, particularly in new schools, in alignment with *“Guidance on the Voluntary Use of Race to Achieve Diversity and Avoid Racial Isolation in Elementary and Secondary Schools”*<sup>4</sup>.

As IDEA expands in existing regions and adds a fifth region in Tarrant County/Fort Worth, it will diversify by design—strategically locating new schools to attract a racially and economically diverse student body. In Austin, for example, IDEA is making careful and strategic school siting decisions to achieve diversity and avoid racial isolation, while meeting community demand for IDEA schools. In 2016, more than three students applied for every one available seat at IDEA Rundberg and at a faster rate than any new IDEA campus opened in 2015. IDEA Allan, the flagship campus in Austin, received more applications (~2,000) than any school in IDEA’s Rio Grande Valley region. **As of May 1, 2016 IDEA Austin had a waiting list of 3,000 students, and according to research conducted by the Texas Tribune, at least 11,000 students are waiting for a high-quality charter school seat to open in the city of Austin.** Due to this city’s hyper economic and racial segregation along the central I-35 corridor, IDEA seeks to locate at least three 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 2018, IDEA will locate two new Austin schools in mixed-income neighborhoods in the Kyle and Pflugerville communities near the I-35 highway where segregated socioeconomic groups come together. Current FRL rates in these communities are both at 50%<sup>5</sup> with IDEA

---

<sup>4</sup> 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>

<sup>5</sup> (Texas Education Agency TAPR Report)

schools being placed in locations with slightly higher levels of poverty than the districts. **This approach to diversity by design has also seen African American enrollment increase 113% in the past three years** from 2.4% to 5.1% at IDEA’s now six Austin schools.

IDEA’s research on neighborhoods most in need of new high-quality charter choices have yielded data on the number of low-income students currently enrolled in struggling schools. This coupled with trends in demographic movement will influence where IDEA schools are placed. **Across the Fort Worth Independent School District (the largest public school district in Tarrant County), 85% of students are eligible for Free and Reduced-price Meals.** IDEA will **recruit students from all communities** in Fort Worth by advertising with culturally specific media outlets such as radio stations with large African American audiences and by holding awareness and recruitment events in all socioeconomic neighborhoods of the city—all without giving admission preference to students of any particular race, ethnicity, or economic background.

As previously noted, IDEA Public Schools has a long history of serving students in high-needs communities, and the combination of IDEA’s reputation, the location of IDEA schools, and IDEA’s recruiting strategy will ensure that this critical population of minority and low-socioeconomic students is also present at each IDEA school. In the paper, “What’s Past is Prologue: How Precollege Exposure to Racial Diversity Shapes the Impact of College Interracial Interactions” (available here: <http://link.springer.com/article/10.1007/s11162-011-9235-2>) researchers Bowman and Denson build off of a consistent body of research proving that pre-college exposure to race leads to positive mixed race experiences post-graduation. They found that students who have had more pre-college exposure to diversity have an easier time adjusting to—and actually enjoying—diversity in college. Additionally, students who had more pre-

college exposure to diversity experience higher levels of college satisfaction and satisfaction with intrapersonal relationships. Given IDEA's strong belief in preparing its students for the academics and cultural life at college, this research is important and compelling. IDEA uses this insight to consider where to place schools in communities so as to best serve students from low-income backgrounds as well as building a more all-around diverse student environment. IDEA's recent siting of two new schools in San Antonio shows this belief in action. IDEA Judson Academy and IDEA Judson College Prep, are two examples of ethnically diverse IDEA schools whose demographics fit its ethnically and economically diverse surroundings: Judson Academy: 61.7% Hispanic; 19.9% African American; 15.8% White; 0.8% Asian; 1.5% two or more races; 69.9% low-income; and Judson College Prep: 72.7% Hispanic; 13.1% African American; 14.1% white; 75.8% low-income.

**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 59% Hispanic and 12% 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 74% in 2016-17.

Lastly, IDEA's teaching staff is 79% Hispanic, 15% white, 5% African American, and 1% Asian. This, too, will further diversify as IDEA expands into Tarrant County and recruits a faculty that closely mirrors the student population it will serve. The Fort Worth Independent School District (ISD)—the largest traditional public school district in the area—is 62.5%

Hispanic, 22.9% African American, 11.2% white, and 1.9% Asian, and IDEA will strive to have a similarly diverse student body and faculty/staff.

**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 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 support to pass End-of-Course exams as a graduation requirement. The majority of IDEA schools offer life skills classes, and IDEA has also seen an increase in the past few years of autistic, emotionally disturbed, and intellectually disabled students (See Appendix I.5 for examples of programming for this student group). **Overall, 4.8% of IDEA students are served by Special Education programs, but *IDEA dedicates 6.8% of its teaching force to ensure these students' Individual Education Plans (IEPs) are met and that all students are served in the least-restrictive educational environment.*** Some IDEA schools serve Special Education populations that are *higher* than the state average of 8.6% (IDEA Allen College Prep: 10.5% and IDEA South Flores College Prep: 9.1%). Over the last three years, IDEA's Special Education population has grown by 230% as our overall student population has grown by 133%—proof that word is spreading about IDEA's program. As IDEA enters new communities, school leaders and teachers work with families to ensure they have information about available special populations program, which generally leads to an increase in program enrollment. IDEA works to help students build reading and math levels through the differentiated Direct Instruction (DI)



curriculum in grades PK-2. Oftentimes, this level of early support for new Kindergarten students leads to some students being exited from Special Education by third grade, thereby lowering IDEA's overall Special Education population.

**Cultural and Language Diversity: English Language Learners.** The proportion of IDEA students served by ELL programs (34.9% in 2015-16) is 16.4 percentage points, or 89%, higher than the percent of ELL students statewide (18.5%). IDEA serves a greater percentage of ELL students than the region of Austin (11.4%), and it is anticipated that IDEA's Tarrant County replication schools will serve a population that is at least 31% ELL (Fort Worth ISD's 2015-16 ELL population).

The following graphic compares the various populations and subgroups of students at IDEA as a whole, the Education Service Center (ESC) Regions IDEA serves, (Regions 1, 13, and 20—3 of 20 such ESCs in the state of Texas, each serving dozens of districts within its region), all Texas charter schools, and the entire state of Texas including charters.

***Evidence of Diverse Populations Served<sup>6</sup>***

INDICATOR (2015 DATA)	IDEA	All TX Charters	State of TX	RGV Reg. 1	Austin Reg. 13	San Antonio Reg. 20
% Low-income	86.1	69.1	58.8	83.7	47.3	62.1
% English-lang. Learners	34.9	21.7	18.2	36.6	16.0	11.4
% Special Education	4.7	6.5	8.5	8.1	9.7	9.5
% African American	2.6	20.1	12.6	0.3	7.0	6.1
% Hispanic	93.6	57.8	52.0	97.5	46.9	71.1
% White	2.6	15.6	28.9	1.6	38.6	18.7

<sup>6</sup> Sources: 2015-16 Texas Academic Performance Report (IDEA Public Schools) and Texas Education Agency 2015 Snapshot (all other columns).

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

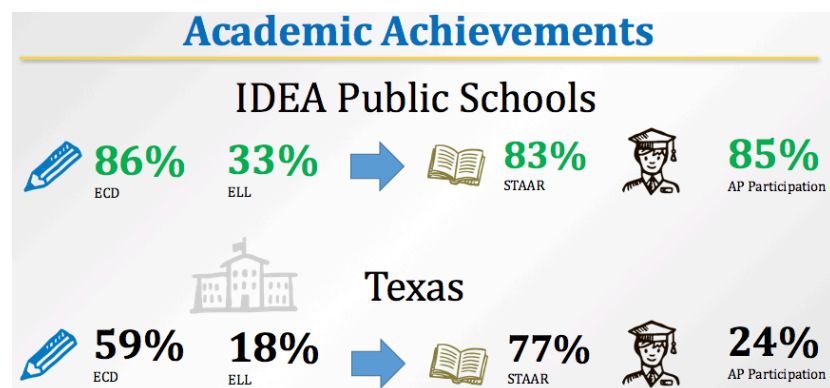
IDEA deploys a cutting-edge elementary-educational model (see Appendix I.6) that moves students from a high-intensity teacher-led instruction to a student-driven program, while enhancing the individualization of instruction with technology-assisted learning.

IDEA's philosophy is to **design** a tight, replicable Pre-K-12 program model, getting students on-grade level in order to lead them to **college preparedness and graduation**. Beginning schools with **Pre-K** leads students to **higher academic readiness and success** in the upper grades. As IDEA expands, it will continue to prioritize the most **academically at-risk students** (those at risk of failing due to one or more socio-economic barriers).

This approach ensures that *every* child receives individualized instruction that prepares them academically for IDEA's rigorous secondary-level college-preparatory environment where **100% of IDEA students have been accepted to a college or university every year for ten consecutive years**.

Since its founding in 2000, IDEA has replicated and expanded its impact in low-income communities across the state, first in Texas' Rio Grande Valley, and then in Austin and San Antonio. **IDEA has managed, executed, and is planning to continue a 37% annual compound growth rate in the number of students enrolled while continuing to increase academic growth**. The

graphic at right shows 2015-15 data proving that IDEA serves a more economically/educationally disadvantaged population



than does the State of Texas, but gets significantly higher results, thus proving that **IDEA can**

**rapidly replicate while maintaining a high level of academic quality.**

**IDEA’s tightly managed operational and efficient financial model ensures its schools are self-funding in year three of operations**, freeing human, facilities, and financial resources to focus on the ultimate goal: **getting a diverse student body prepared for, accepted to, enrolled in, and graduated from college.** 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.<sup>7</sup> At IDEA, 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 career objectives and personal financial situation, as evidenced by 38% of the class of 2016 being selected to Tier I or II colleges<sup>8</sup>. As of this month, 32% of the Class of 2017 has already been accepted to at least one Tier I / II college.

### ***History and Expansion of IDEA***

IDEA Academy was conceived in 1999 by Tom Torkelson and JoAnn Gama, who continue to lead the district as CEO and President/Superintendent, respectively. All the stakeholders in IDEA Academy were unified from the beginning by the belief that there were no quick, easy methods to enhance student achievement; high quality instruction from teachers and intense

---

<sup>7</sup> <http://www.aei.org/files/2010/03/18/Rising-to-the-Challenge.pdf>

<sup>8</sup> Tiered breakdown is composed of Barron’s Most Competitive, Highly Competitive and Very Competitive (+) rankings. <http://barronseduc.com/1438006896.html>. See also Appendix I.7 for a list of Tier I and II colleges and IDEA’s college partnerships.

effort from students were the only ways to achieve sustained improvement.

In August of 2000 the IDEA Academy became an independent state charter school, was renamed IDEA Public Schools, and began serving students in grades 4-7. The campus scaled over time to serve grades K-12 and graduated its first senior class in 2007. **IDEA students are now graduating from college at a rate that is more than three times the national average for low-income students—36% vs. 10%.<sup>9</sup>** In fact, 23% of the flagship campus teaching staff (see Appendix I.8) were once IDEA students who came back to teach in the community that helped them succeed.

### ***The Need for IDEA's Model is Great***

In 2004 IDEA Public Schools' senior leadership team and board of directors embarked on an ambitious expansion plan to scale from two schools serving 1,000 students to a network of 22 schools serving 15,000 students across the Rio Grande Valley region of South Texas. The last of the schools planned during the **first phase of expansion** opened in 2012-13, and IDEA actually exceeded its goal by six schools (total of 28). The 2012 plan forecasted serving 13,440 students at scale, but these schools serve 21,229 students—again exceeding the goal. In 2012, IDEA began its **second phase of expansion**, which included growing beyond the Rio Grande Valley into San Antonio and Austin for a total of 42 schools in 2015-16; instead, IDEA operated 44 schools that year and is on track to operate 61 schools by 2017-18 rather than the 56 originally proposed by this deadline. Likewise, the 2017 plan forecasted 39,536 students, but IDEA will actually serve 48,990 students when this phase of the plan is complete. As noted in the

---

<sup>9</sup> Source: [http://www.pellinstitute.org/publications-Indicators\\_of\\_Higher\\_Education\\_Equity\\_in\\_the\\_United\\_States\\_2016\\_Historical\\_Trend\\_Report.shtml](http://www.pellinstitute.org/publications-Indicators_of_Higher_Education_Equity_in_the_United_States_2016_Historical_Trend_Report.shtml)

following graphic, IDEA now operates 51 schools across three regions with plans to increase its impact to 143 schools, by the end of this CSP project period.

*Total Number of Schools in Operation (Cumulative)*

School Year	Lower RGV	Upper RGV	San Antonio	Austin	El Paso	Southern Louisiana	Tarrant County	TBD Region 8	TBD Region 9	District
16-17	15	16	14	6						51
17-18	15	20	20	6						61
18-19	17	22	22	10	4	4				79
19-20	19	24	24	14	6	6	4			97
20-21	21	26	26	18	8	8	6	4		117
21-22	23	28	28	22	12	12	8	6	4	143

IDEA's approach to growth is to cluster schools regionally to leverage efficiencies of scale and centralized school support. Adding eight or more schools within a region also allows IDEA to significantly increase the percentage of low-income, minority college graduates in each of its launch communities. Again, please see Appendix I.4 for IDEA's site selection rubric.

**IDEA's current growth plan is ambitious but achievable, and past successes scaling up schools with quality are evidence of this.** In seeking to educate over 100,000 students by 2023 in communities that demand high-quality options, **IDEA will be the 3rd-largest district in Texas** (out of 1,031 traditional districts and 189 charter districts) **and one of the largest and most successful national CMOs in the country with the potential to generate academic achievement for first-generation college students at a scale not seen before.**

**IDEA simply cannot build schools fast enough to accommodate the growing demand.** In 2014-15, there were 15,604 applications for 4,810 open seats, leaving 10,794 students on waiting lists, and demand continues to grow even as new schools open. In 2015-16, IDEA saw 20,832 applicants for 7,129 open seats, and the waiting list grew to 13,702. **For 2016-17 (year to date), 31,465 applicants for 7,757 seats meant 23,708 students could not get into IDEA's high-performing network despite the fact that the number of available seats had almost doubled in the past two years, and this number will only grow as the school year progresses.** In light of high demand throughout these regions and continued poor relative

performance of surrounding school districts, IDEA will grow to serve even more students in Austin, the Rio Grande Valley, and San Antonio and is now ready to expand north to Tarrant County. Also crucial to IDEA's ability to grow to scale with quality is its ability to identify, recruit, hire, and retain great teachers. Please see page 53 for how IDEA has been recognized for building capacity in its human capital pipeline, even as the demand for great teachers and leaders increases.

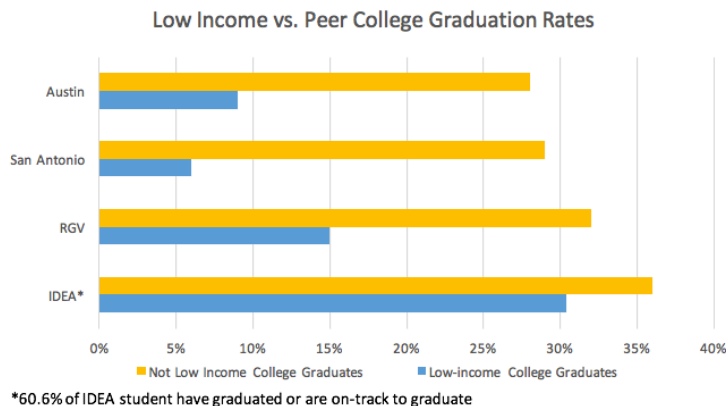
Beyond demand, several data points compelled IDEA's senior leadership team and board of directors to pursue continued ambitious growth plans, including Texas's rapidly growing Hispanic student population, for which IDEA's model has proven successful year after year; the high poverty rate among Hispanic 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 4<sup>th</sup> and 8<sup>th</sup> grade math and 4<sup>th</sup> and 8<sup>th</sup> grade reading)<sup>10</sup>. Of Texas high school graduates, only 26% meet college readiness benchmarks in all four core subjects (math, reading, science, social science), and only 14% of Hispanic graduates meet these benchmarks.<sup>11</sup> In the regions that IDEA currently serves, the **Rio Grande Valley** had 15% of low-income students graduate from college as compared with 32% of students who are *not* low-income. The data for **San Antonio** and **Austin** is even direr: 6% and 9% of these regions' low-income students, respectively, will graduate from

---

<sup>10</sup> Source: [https://www.nationsreportcard.gov/reading\\_math\\_2015/#?grade=4](https://www.nationsreportcard.gov/reading_math_2015/#?grade=4)

<sup>11</sup> From the ACT's reports on the Condition of College and Career Readiness: [https://www.act.org/content/dam/act/unsecured/documents/state44\\_Texas\\_Web\\_Secured.pdf](https://www.act.org/content/dam/act/unsecured/documents/state44_Texas_Web_Secured.pdf) and <http://www.act.org/content/dam/act/unsecured/documents/CCCR-2014-Hispanic.pdf>

college as compared with 29% and 28% of students who are *not* low-income.<sup>12</sup> **However, according to the National Student Clearinghouse, 60.6% of IDEA’s students (and 30.4% of low-**



**income students) have graduated or on track to graduate from college.** 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.<sup>13</sup> **As IDEA grows to scale with quality, so does the demand for a high-quality IDEA seat, which compels IDEA to grow even more, thus creating an upward spiral of achievement in every community IDEA serves.** IDEA’s focused college preparatory curriculum coupled with outstanding instruction and school leadership will ensure that IDEA continues its 16-year tradition of preparing students for college and citizenship.

### IDEA Produces Evidence of Student Success

The Texas Education Agency data provided in the table below (as well as more extensive data provided in Appendix G) are discussed in subsequent subheadings referring to **increasing achievement and attainment for all students** and IDEA’s outstanding results for low-income and minority students.

<sup>12</sup> <https://www.texastribune.org/education/public-education/8th-grade-cohorts/about/>

<sup>13</sup> Texas enrolls 5,215,282 students, but only 227,827 of them (4.4%) attend an open-enrollment charter school. Source: <https://rptsvr1.tea.texas.gov/perfreport/snapshot/2015/state.html>

Of particular note is the similarity in demographics between IDEA Public Schools and Region 1 (Rio Grande Valley) Educational Service Center (see table on page 8) yet the vast difference in student achievement for these two comparison groups. The IDEA network serves a subset of students from Regions 1 (Rio Grande Valley, or RGV), 13 (Austin), and 20 (San Antonio) yet achieves significantly better results across the board than each of these regions' averages (see each column below). The following table shows data for Tarrant County Region (Region 11, Fort Worth) as well, which IDEA also outperforms, indicating a need to expand IDEA's proven academic and operating model here.

INDICATOR	IDEA	State of TX	RGV	Austin	San Antonio	Fort Worth
Annual Dropout Rate Gr 9-12 (2014-15)	0.1	2.1	2.0	1.5	2.3	2.3
4-year Longitud Grad Rate (Class of '15)	99.1	89.0	88.2	92.3	88.3	89.3
% COLLEGE-READY GRADUATES (Class of 2015)						
College and Career-Ready Graduates	95.8	74.5	83.2	75.6	70.9	72.2
AP/IB RESULTS (Class of 2015)						
% Tested	86.7	24.9	27.8	31.5	26.9	28.0
% At or Above Criterion	58.1	49.1	35.2	60.3	42.7	53.1
ACT PERFORMANCE (Class of 2015)						
% Tested	100	68.3	65.9	69.3	67.8	69.4
% At or Above Criterion	18.3	24.3	10.5	36.8	20.5	30.8
ACT Average Composite	19.6	20.6	18.0	22.3	20.3	21.9
COLLEGE SUCCESS (2013-14) <i>Most recent comparative data available</i>						
% Graduates Enrolled in a TX IHE	91.4	57.5	61.6	56.4	55.6	57.6

### *Indicators of College Readiness*

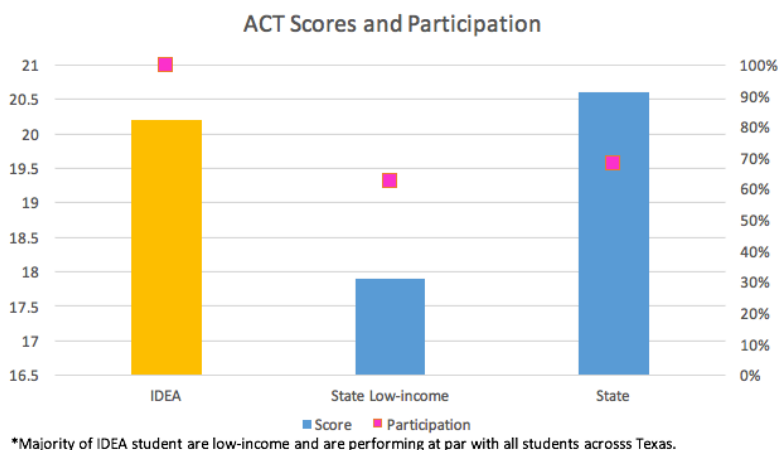
More students in Texas are taking the ACT, but as more students take the exam, scores are dropping (see the ACT report on College and Career Readiness in Texas, Appendix I.9). **IDEA is an outlier: it has tested more students *while* it expands its network, and the composite score continues to increase<sup>14</sup>.**

**Every student at IDEA takes the ACT**, and scores are comparable to the state average where just over 2/3 (68.3%) of students are tested—the same relative proportion in all the

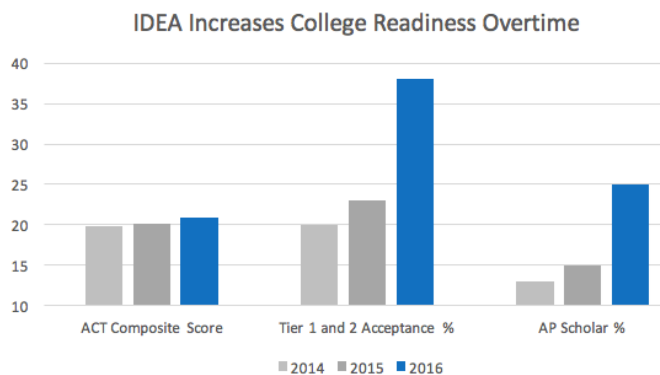
<sup>14</sup> From 18.6 for the Class of 2011, for example, to 20.9 for the Class of 2016.



comparison regions as well. (Please also see similar trends for AP results, discussed further on page 21.) As shown in the table on page 15, in 2014-15 IDEA students performed 1.6 points ahead of all students in the Rio Grande Valley and only 1 point below the state ACT average, which (unlike IDEA) excludes almost one-third (31.7%) of all students—and 37.4% of low-income students—from SAT/ACT testing<sup>15</sup>.



**Even as IDEA has continued to expand, college readiness indicators have only gotten better.** In 2016, four of IDEA’s seven high schools achieved an average ACT composite of 21 or higher. IDEA’s Class of 2017 ACT average was 20.9 (higher than the 2015-16 state average of 20.6), with 31% of students scoring above 23. The average ACT score for all students across the state (Class of 2015- most recent comparative data available) is 20.6. For low-income students across the state, the average ACT score is 17.9. It bears repeating that across Texas, only 68.3% of all students and 62.6% of low-income students were tested. Of these numbers, only 24.3% of all students and a mere 9.5% of low-



<sup>15</sup> Texas Education Agency data for 2015-16: All students taking SAT or ACT—68.3%; low-income students taking SAT or ACT—62.6%.

income students in Texas scored at or above criterion. The graphic at right shows three years of data. (“AP Scholars” is IDEA’s designation for students earning scores of 3 or higher on at least 3 AP course exams.)

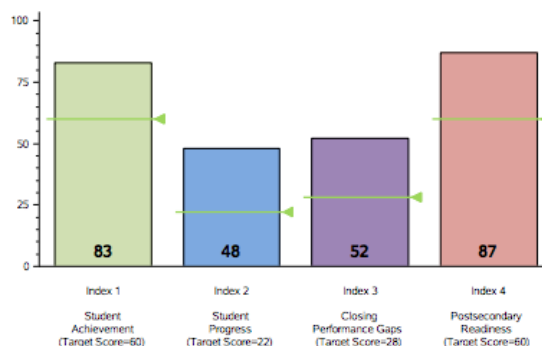
**Program Performance Measure-4<sup>th</sup> & 8<sup>th</sup> Grade Achievement**—By 4<sup>th</sup> grade, low-income students are typically two years behind their wealthier peers, and by 8<sup>th</sup> grade, low-income students have often slipped three years behind grade level. These statistics do not bear out at IDEA where, **in 2015-16, both 4<sup>th</sup> and 8<sup>th</sup> graders outperformed the state in reading (grade 4: 83% vs. 75%; grade 8: 93% vs. 87%) and math (grade 4: 78% vs. 75%; grade 8: 100% vs. 82%),** proving demographics are not destiny (see Appendix G). Please see the objectives table on page 37 for IDEA’s high performance standards in all core subjects. In accordance with required performance measures, IDEA will report on 4<sup>th</sup> and 8<sup>th</sup> grade student data annually.

The following graphic shows three years of data for all students at IDEA, three comparison regions, and the state as a whole. **In every subject for every year, IDEA outperformed all.** Please also see Appendix G for three years of IDEA and state-level data disaggregated by grade level, subject area, and subpopulation (African American, Hispanic, white, Asian, economically disadvantaged, ELL, and Special Education) for proof that **IDEA’s model increases achievement for all students, regardless of educational or economic disadvantage.**

***STAAR Percent at Phase-in Satisfactory Standard (Passing) or Above—All Students***

Subject	IDEA			STATE			RGV			San Antonio			Austin		
	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016	2014	2015	2016
All Subjects	82	83	83	77	77	75	71	73	77	75	76	72	80	81	78
Reading	81	82	82	78	77	73	68	71	76	75	76	71	81	81	77
Mathematics	83	88	84	79	81	76	75	79	78	75	79	73	81	85	79
Writing	78	78	76	63	72	69	70	71	72	69	69	65	74	74	72
Science	86	86	90	82	78	79	74	75	81	77	78	77	83	82	81
Social Studies	85	86	85	76	78	77	69	72	80	75	76	75	81	82	81

In addition to this outstanding achievement, the district as a whole and each individual school receive annual scores on four indices—Student Achievement, Student Progress, Closing Performance Gaps and 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).**



The State of Texas has recently instituted a system of letter grades for each school and each district as a whole. The current iteration of this assigns grades to each one of four domains as noted in the graphic above. The table below compares IDEA Public Schools with the major districts in which IDEA operates, including its intended expansion region of Tarrant County.

*District Letter Grade Results by Domain*

District	I	II	III	IV
<b>IDEA Public Schools</b>	<b>B</b>	<b>A</b>	<b>A</b>	<b>A</b>
Brownsville ISD	C	A	A	C
Austin ISD	B	B	C	D
San Antonio ISD	F	C	D	F
Fort Worth ISD (Tarrant County)	D	D	C	D

**Out of over 1,240 public school districts, open-enrollment charter schools, and juvenile justice districts in Texas, only 2 districts scored all As and only 15 districts, including IDEA, scored three As and one B.** Of the 16 other districts earning the highest grades across all four domains, **IDEA is the largest district and serves the most minority students of them all.** Please see Appendix I.10 (Scaling with Quality) for a list of these highest rated districts and their comparative student populations. Please also see Appendix I.11 for letter grades assigned to each individual IDEA campus as well as for grades assigned to Texas’ largest charters.

The State of Texas tracks **attendance** and **high school graduation rates** at the school,

district, region, and state levels for all students and for subpopulations. Four years of data are presented in this table for IDEA and three years for Texas; because comparative state-level data reports lag one year behind, 2015 data is not available for Texas as a whole. For three years of attendance, dropout, and graduation data by district and for the State of Texas as a whole, broken down by subpopulations, please see Appendix I.12.

**IDEA continues to outperform the state in each indicator and for every comparative year despite a compounded growth rate of 37%, year over year.** It is important to keep in mind that, although IDEA’s attendance dipped slightly from 2012-13 to 2015-16 (-0.62 point), so did that of the state average, yet IDEA served 87.2% *more students*, whereas state enrollment only increased by 4.4% in that same time period.

IDEA vs. Texas Results	IDEA	State <sup>1</sup>	IDEA	State	IDEA	State	IDEA	State
	2012-13	2012-13	2013-14	2013-14	2014-15	2014-15	2015-16	2015-16
Attendance—All	<b>98.2%</b>	95.8%	<b>98.0%</b>	95.9%	<b>97.5%</b>	95.7%	<b>97.6%</b>	DNA
— Low-income	<b>98.8%</b>	95.4%	<b>97.9%</b>	95.5%	<b>97.6%</b>	95.4%	<b>97.5%</b>	DNA
— ELL	<b>98.50</b>	96.6%	<b>98.2%</b>	96.6%	<b>97.8%</b>	96.4%	<b>98.0%</b>	DNA
— Special Education	<b>97.7%</b>	94.5%	<b>97.5%</b>	94.6%	<b>96.9%</b>	94.4%	<b>97.1%</b>	DNA
Retention <sup>2</sup>	<b>92.3%</b>	82.9%	<b>92.8%</b>	83.1%	<b>91.5%</b>	DNA	<b>91.5%</b>	DNA
Class of:	<b>2013</b>	<b>2012</b>	<b>2014</b>	<b>2013</b>	<b>2015</b>	<b>2014</b>	<b>2016</b>	<b>2015</b>
HS Graduation—All <sup>3</sup>	<b>96.2%</b>	93.7%	<b>97.1%</b>	93.4%	<b>98.1%</b>	93.4%	<b>95.6%</b>	93.7%
— Low-income	<b>96.1%</b>	90.2%	<b>96.7%</b>	91.5%	<b>98.0%</b>	91.0%	<b>95.3%</b>	91.3%
— ELL	<b>96.3%</b>	75.0%	<b>93.0%</b>	76.3%	<b>97.0%</b>	74.3%	<b>88.2%</b>	82.0%
— Special Education	<b>84.6%</b>	88.8%	<b>90.6%</b>	88.9%	<b>93.3%</b>	88.8%	<b>68.8%</b>	89.6%

*For additional information on table (1, 2, 3), see footnotes below<sup>16</sup>.*

<sup>16</sup> (1) State data for 2015-16 attendance and Class of 2016 graduation will not be available until November 2017. IDEA data for 2015-16 attendance and Class of 2015 graduation are from IDEA’s Data Analysis Team. (2) Calculated as 100% - mobility rate. A student is considered to be “mobile” if s/he has been enrolled in the school for less than 83% of the school year. Texas does not report by sub-group. (3) Excludes students who were retained and continued with

Finally, please see Appendix I.13 for three years of **suspension and expulsion** data that show IDEA's rates for each are low. In 2015-16, IDEA only suspended 3.24% of its students and expelled less than .01%. Data for these indicators are also available by subpopulation.

**(1) IDEA increases academic achievement and graduation for all students**

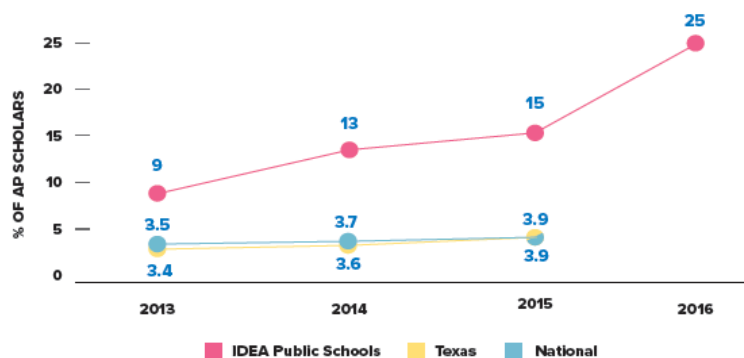
As previously stated, IDEA Public Schools serves a student population that reflects the cities and communities in which IDEA locates its schools. This means the student body is majority economically disadvantaged (88.6%), and English-language Learners (34.9%)—populations traditionally underserved by public education. Therefore, **virtually *all* IDEA students are educationally disadvantaged**. This combination of obstacles to success in a rigorous college-preparatory program located in the Rio Grande Valley of Texas and the inner cities of San Antonio and Austin seems daunting, if not impossible, to many educators and the public at large. **However, the committed teachers and leaders of IDEA Public Schools welcome the challenge to do what other districts in the area believe cannot be done: exceed expectations and actual academic performance without excuse for student background, family educational attainment, or socio-economic level.**

The table on page 15 shows evidence of high performance and results for all children. IDEA has **more college and career-ready graduates** (97.3%) than any of the comparison groups. **Most notably in 2015, almost 3 ½ times more IDEA students took AP tests than the state average (86.7% vs. 24.9%), yet proportionally more students passed those AP tests than students across the state. For every 100 high school students IDEA enrolls, 86.7 took an AP**

---

IDEA, such as students with severe disabilities who will stay at IDEA until age 21 when they transition out.

exam in 2015 and 58.1% (or 50.37 students) passed (up from 42.2% the year before). Compare this with the state’s 24.9 students per hundred who tested and only 49.1% (or 12.2 students) who 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 61 percentage points (158% more students) and exceeds the national rate by almost 34 percentage points (176% more students).** IDEA’s long-range goal is to have 35% of high school students (up from 2016’s rate of 25%) become IDEA AP Scholars (IDEA’s designation for students earning scores of 3 or higher on at least 3 AP course exams). In 2016, 25% of IDEA students were AP Scholars (see graph at right), and data indicates IDEA is on track to reach 30% this year. **In 2015-16, 2,611 IDEA students took AP exams; 1,027 of**



**them (39.33%) passed at least one.** IDEA focuses on AP for All because peer-reviewed research<sup>17</sup> 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.

IDEA is also increasing the number of students who enroll in and graduate from college. **IDEA’s majority-minority, high-needs, low-income students enroll in public Texas institutions of higher education (see table below) at a rate of 91.4%—33.9 percentage**

<sup>17</sup> Summarized here: <http://collegeready.rice.edu/ap-and-college-readiness>

points (59%) higher than the state enrollment rate of 57.5% for all students and 29.8 points (48%) higher than the Region I (RGV) enrollment rate of 61.6% for all Region 1 students.<sup>18</sup> IDEA’s educationally disadvantaged students are dramatically outperforming the state average for college matriculation for students from any socio-economic or academic background. IDEA’s closure of achievement gaps is also evident in its results on the Texas Index 3 “Closing Performance Gaps” measure. IDEA’s students in aggregate across economically disadvantaged, African American, and Hispanic subpopulations achieved a score of 52 on Index 3, 24 points ahead of the state target score of 28 (see bar graph on page 18). Again, please see Appendix E for detailed information regarding three years of evidence of increasing student performance by subgroups (excerpted on page 25), and see the following table for three+ years of data showing IDEA sends more of its students to college<sup>19</sup>.

Graduates Enrolled in a Texas Institution of Higher Education (IHE)	IDEA			STATE		
	2011-12	2012-13	2013-14	2011-12	2012-13	2013-14
	89.5%	91.6%	91.4%	58.3%	56.9%	57.5%

The next table shows indicators that are available for IDEA only and demonstrates that IDEA is closing the college achievement gap between income classes. The Texas Education Agency does not track rates of **college persistence**, and it only tracks **college matriculation** for those students who enroll in a Texas college as indicated above, not nationwide<sup>20</sup>.

<sup>18</sup> Texas Academic Performance Report 2015-16.

<sup>19</sup> The Texas Education Agency does not track this indicator by subpopulation, and available data lags two years behind the year in which it is reported, hence the older years of data provided.

<sup>20</sup> 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

IDEA Results Only	IDEA		
	2013-14	2014-15	2015-16
<b>College Persistence/Graduated</b>	60.6%	87.4%	88.8%
— Non-Economically Disadvantaged	72.2%	87.3%	88.5%
— Low-income	59.1%	87.4%	88.8%
— ELL	36.4%	79.0%	76.5%
— Special Education	55.6%	82.6%	59.4%

Regarding matriculation rates for students served by Special Education, students in Life Skills classes stay at IDEA as long as age 21 (see Appendix I.14 for student transition plan). For other students with disabilities who do matriculate to college right after graduation, they continue to persist in this path—proof that IDEA is doing better preparing them academically as well as helping them find the best match and fit.

## ***(2) IDEA produces outstanding results for educationally disadvantaged students***

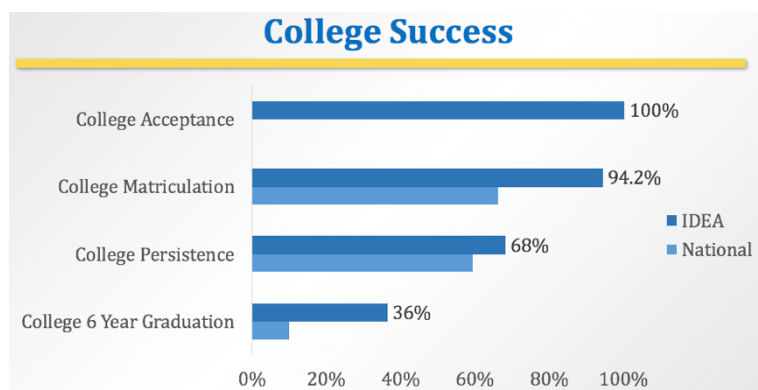
IDEA staff and students have worked diligently to achieve impressive **high school graduation rates, college attendance rates, and college persistence rates** for students from low income backgrounds, which match rates for students overall (see Appendix I.15). Beyond IDEA’s 4-year **high school graduation** rate of 99.1% (state rate: 89.6%) and in addition to multiple examples of IDEA’s students post-secondary readiness (see table on page 15 and bar graphs on page 16), the following graphic shows **college acceptance, matriculation,**

---

audit to verify and confirm that 100% of students have matriculated to college. For 9 out of the last 11 years of graduating classes, 100% of students have matriculated to college. (A few have entered military service instead.)



**persistence, and 6-year college graduation rates for IDEA alumni vs. all low-income students**

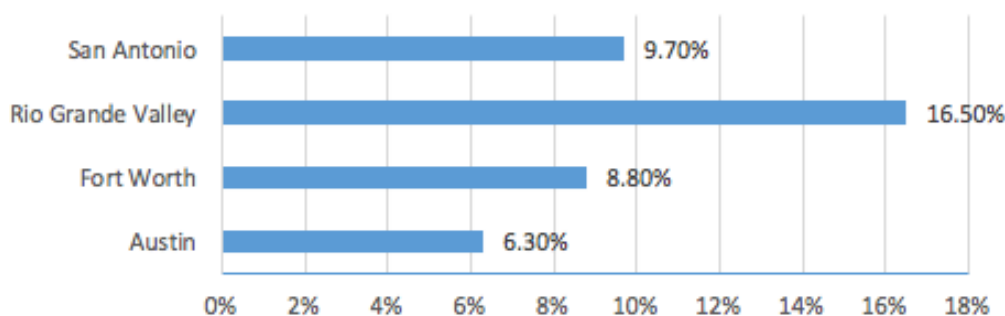


nationally.<sup>21</sup>

**Most notably, an outstanding 100% of IDEA graduates have enrolled in college for eleven years in a row<sup>22</sup>. Thirty-six**

**percent of all IDEA alumni complete a college degree within six years of enrollment, compared to only 22% in Texas and 10% of low-income students nationally.** The following graphic shows college completion rates for all students in the communities in which IDEA operates (not IDEA students, specifically) and includes the new planned region of Tarrant County/Fort Worth. (See Appendix I.37 for more detail on Alumni Support and Results).

#### *Local College Completion (All Students in IDEA Regions)*



**Source:** Texas Tribune; Students from low-income backgrounds.

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

<sup>21</sup> IDEA data based on Clearinghouse report from April 2016 and Class of 2016 applications/matriculation. National benchmarks from NCES and Texas Tribune.

<sup>22</sup> For one of these eleven years, the figure was 99.9%. 100% excludes the few students who joined the military.

IDEA Public Schools has ample evidence (presented in three years of additional detail in Appendix G) that it has significantly increased student academic achievement and attainment for all students as well as for student subgroups—African American, Hispanic, White, American Indian, Asian, Pacific Islander, Two or More Races, Special Education, Economically Disadvantaged, and English-language Learners. The following graphic shows an excerpt of this data, summed across all grades and subjects, for 2015-16 (most recent comparative data available) and denotes district-wide data as well as comparisons to the State of Texas and to Region 1 (Rio Grande Valley). Please note that **academic achievement for economically disadvantaged students** (88.6% of IDEA’s population) **across all grades and subjects is as high as the district average for all students** (82% and 83%, respectively); **both averages are higher than the region and state.**

### *IDEA Public Schools*

		State	Region 01	District	African American	Hispanic	White	American Indian	Asian	Pacific Islander	Two or More Races	Special Ed	Econ Disadv	ELL <sup>^</sup>
STAAR Percent at Level II Satisfactory Standard or Above														
All Grades														
All Subjects	2016	75%	73%	83%	79%	83%	87%	79%	98%	96%	89%	50%	82%	75%
Reading	2016	73%	68%	82%	77%	82%	86%	83%	100%	89%	93%	44%	81%	73%
Mathematics	2016	76%	77%	84%	79%	84%	88%	70%	97%	100%	71%	58%	83%	80%
Writing	2016	69%	69%	76%	77%	76%	85%	*	96%	*	*	34%	75%	65%
Science	2016	79%	78%	90%	87%	89%	94%	88%	100%	*	*	59%	89%	81%
Social Studies	2016	77%	74%	85%	94%	85%	84%	*	93%	-	*	48%	85%	69%

### *State of Texas*

		State	African American	Hispanic	White	American Indian	Asian	Pacific Islander	Two or More Races	Special Ed	Econ Disadv	ELL <sup>^</sup>
STAAR Percent at Level II Satisfactory Standard or Above												
All Grades												
All Subjects	2016	75%	64%	70%	85%	74%	92%	78%	82%	39%	67%	57%
Reading	2016	73%	63%	68%	84%	72%	91%	75%	82%	35%	65%	52%
Mathematics	2016	76%	64%	73%	85%	75%	94%	79%	82%	43%	70%	65%
Writing	2016	69%	60%	64%	80%	67%	90%	74%	77%	32%	60%	50%
Science	2016	79%	68%	75%	88%	79%	94%	81%	85%	44%	72%	58%
Social Studies	2016	77%	70%	73%	86%	79%	92%	81%	84%	42%	69%	47%

On the state-mandated, criterion-referenced STAAR exam, **IDEA’s students outperformed both the state and region for all grades and all subjects combined in almost every single**

**comparison subgroup**<sup>23</sup>. When comparing across most subgroups (ex: IDEA’s ELL students vs. the State of Texas’s ELL students; IDEA’s Special Education students vs. those across the state), the more detailed subpopulation data in Appendix G show that IDEA’s students outperform almost universally. Again, it is important to keep in mind that **IDEA serves a population that is significantly more educationally and economically disadvantaged than that of the entire state (see graphic on page 3), yet its academic results are stronger overall.**

**(3) IDEA has had no significant financial, operational, statutory, regulatory, or safety issues.** IDEA Public Schools currently operates charter schools in three regions of Texas (Rio Grande Valley, Austin, and San Antonio) under the authority of the Commissioner of the Texas Education Agency (charter authorizer) and has never had any schools closed, had its charter revoked, had any statutory or regulatory compliance issues, had any student safety violations or issues (see Appendix I.16 for related safety documents), or had any operational mismanagement.

IDEA’s financial and operational soundness is supported by its School FIRST (Financial Integrity Rating System of Texas) rating of “A – Superior” and its related passing score of 96 (a score of 31 is considered “Passing”). 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

---

<sup>23</sup> In 2014, students with IEPs took modified (below grade-level) state exams in order to graduate. Now all students take the regular EOC exam, so lower scores is attributable to the change to the more rigorous exam. An \* means fewer than 30 students tested in that subject.

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<sup>24</sup>**. 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.

## B. IDEA SERVES EDUCATIONALLY DISADVANTAGED STUDENTS

### *(1) IDEA Serves Educationally Disadvantaged Students at Comparable or Higher Rates Than Surrounding Districts*

IDEA’s student population is 88.6% low-income and 34.9% ELL—a highly educationally disadvantaged student body. In addition, 49.4% 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 as well as representative traditional public (independent) school districts (or ISDs) that draw students from the same neighborhoods as IDEA.

Comparison Entity	Afr Amer	Hispanic	At-Risk	Econ Disadv	Special Ed	ELL
State of Texas	12.6%	52.2%	50.1%	59.0%	8.6%	18.5%
IDEA Public Schools--ALL	2.6%	93.6%	49.4%	88.6%	4.9%	34.9%
Region 1 (Rio Grande Valley)	0.3%	97.4%	64.7%	85.0%	7.5%	36.9%
IDEA RGV Schools	0.5%	96.5%	52.5%	89.3%	4.2%	37.4%
Brownsville ISD	0.1%	98.7%	66.6%	94.7%	10.5%	33.1%
McAllen ISD	0.4%	93.5%	58.0%	72.9%	8.4%	31.0%
Region 13 (Austin)	6.8%	47.1%	44.5%	46.1%	9.5%	16.4%
IDEA Austin Schools	5.3%	90.9%	67.2%	94.4%	7.4%	58.2%
Austin ISD	7.8%	58.8%	55.1%	57.4%	10.0%	28.0%
Region 20 (San Antonio)	6.1%	71.0%	52.1%	61.8%	9.6%	11.7%
IDEA San Antonio Schools	2.5%	80.3%	25.3%	85.6%	6.4%	11.4%
San Antonio ISD	6.4%	90.8%	68.8%	92.2%	10.2%	19.1%

<sup>24</sup>[http://tea.texas.gov/Finance\\_and\\_Grants/Texas\\_Permanent\\_School\\_Fund/Texas\\_Permanent\\_School\\_Fund\\_-\\_Annual\\_Report/](http://tea.texas.gov/Finance_and_Grants/Texas_Permanent_School_Fund/Texas_Permanent_School_Fund_-_Annual_Report/)

As is evident from data supplied on pages 23-25, 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 Critical Student Interventions, Catalyst, and Content Mastery (described on page 7). Again, see Appendix I.4 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 and economic backgrounds in alignment with its open-enrollment policy and future site selection plans as described on page 5.

## ***(2) IDEA Recruits and Enrolls Educationally Disadvantaged Students***

IDEA accepts all students through an **open-enrollment lottery** process (See Appendix I.17 for student **recruitment, selection, lottery, and admissions** policies, **Application Requirement I**) and **excludes no student due to emotional, physical, or learning disability or linguistic need**. To the contrary, IDEA has been actively providing parents and caregivers with information about its special education program at its annual Welcome Events—one per year per school. 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 also meet with incoming students and their families before the academic year begins at each school’s “Welcome to IDEA” events for new enrollees. Parents also learn about how IDEA supports students in **life skills classrooms** with a variety of

disabilities ranging from autism to cerebral palsy. IDEA has continued to add life skills classrooms as more in-need students enroll. 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.

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. 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.18). These events noted increase 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.19 for a recent article on IDEA's life skills students. Articles like this one, also promoted on the IDEA website, provide valuable information for parents. See also Appendix I.20 for a highlight on one of IDEA's life skills 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.21 for an article from The Monitor).

IDEA's ELL population is 34.9%. The ELL population across the entire state, including charter schools, is 18.5%, and **when compared with other charters throughout the state,**

**IDEA serves 71% more ELL students by proportion** (34.9% vs. 18.5%). These data prove that IDEA serves a diverse and high-need population, eschewing reasons why students “can’t” succeed in favor of results that say they *can*.

The tables below show performance by regional and District average, broken down by Educationally Disadvantaged populations for each. **Note that IDEA’s student performance across the district is higher than each of the three regional averages in almost every comparative group.**

*Comparative STAAR Exam Results—Percent Passing or Above*

Content Area	District				Region 1				Region 13				Region 20			
	ALL	SpE	ED	ELL	ALL	SpE	ED	ELL	ALL	SpE	ED	ELL	ALL	SpE	ED	ELL
<b>All Subjects</b>																
2016	83	50	82	75	73	38	70	57	78	41	65	55	72	38	65	54
2015	83	47	82	71	73	38	70	54	81	47	69	55	76	44	68	54
2014	82	66	81	67	71	54	69	54	80	60	69	57	75	56	67	55
<b>Reading</b>																
2016	82	44	81	73	68	32	65	50	77	38	63	51	71	34	63	50
2015	82	46	82	72	71	37	69	54	81	49	69	57	76	44	69	56
2014	81	66	80	62	68	50	66	49	81	61	69	56	75	57	68	54
<b>Mathematics</b>																
2016	84	58	83	80	77	45	75	67	79	44	67	63	73	41	66	62
2015	88	48	88	80	79	46	77	61	85	50	77	64	79	46	73	57
2014	83	65	81	74	75	60	73	63	81	62	71	64	75	58	68	62

Trends to note are as follows: **Overall** and in **Reading**, IDEA’s performance steadily increased while all comparison regions except for the RGV (Region 1) declined last year. In **Math**, scores for IDEA students served by Special Education rose 10 points. Scores for all IDEA students across all subjects remained constant even as IDEA added 10 schools. Please see additional data disaggregated by ethnic groups as well as these subpopulations provided in Appendix G.

### **IDEA’s Projected Educationally Disadvantaged Population at New Sites**

For 2015-16, there were 22,683 students on IDEA waitlists across all regions. For 2016-17, despite opening eight new schools and adding at least one grade to 14 more, IDEA had even more applicants than previous years—more than four for every open seat.

With the most recent waitlist reaching an unprecedented 31,465 students<sup>25</sup>, 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. (See additional information in Appendix I.3 for the process IDEA uses to determine new IDEA regions.)

For this CSP grant, **IDEA will expand or add (replicate) 16 schools in Austin, 23 in the Rio Grande Valley, 21 in San Antonio, and 6 schools in Tarrant County/Fort Worth.** This will add a total of 26,473 high-quality, open-enrollment charter school seats (53,889 seats at full scale), which will dramatically increase the number of low-income college graduates from traditionally underserved communities in Texas. The table below shows the plan to fund 20 expansion and 46 replication schools, noting only year 1 of their operation.

***Replication and Expansion Sites by Region***

<b>REGION</b>	<b>2017-18 Year 1</b>	<b>2018-19 Year 2</b>	<b>2019-20 Year 3</b>	<b>2020-21 Year 4</b>	<b>2021-22 Year 5</b>
Austin	450	441	340	198	179
Rio Grande Valley	780	746	534	273	170
San Antonio	1,052	1,010	849	472	273
<b><i>Expansion Seats</i></b>	<b>2,282</b>	<b>2,197</b>	<b>1,723</b>	<b>943</b>	<b>622</b>
Austin	0	1,052	1,524	1,524	472
Rio Grande Valley	1,052	1,524	1,996	1,524	472
San Antonio	1,578	1,234	1,470	762	236
Tarrant Co/ Ft Worth	0	0	1,052	998	236
<b><i>Replication Seats</i></b>	<b>2,630</b>	<b>3,810</b>	<b>6,042</b>	<b>4,808</b>	<b>1,416</b>
<b><i>Total Seats (Cumulative)</i></b>	<b>4,912</b>	<b>6,007</b>	<b>7,765</b>	<b>5,751</b>	<b>2,038</b>
	<b>4,912</b>	<b>10,919</b>	<b>18,684</b>	<b>24,435</b>	<b>26,473</b>
<b><i>When fully scaled, these schools will collectively enroll 26,473 students.</i></b>					

<sup>25</sup> IDEA's lottery for fall 2017 enrollment was held on January 28, 2017.



By the end of this CSP funding period (2017-18 through 2021-22), IDEA will operate 121 schools in these six regions (as well as schools in other regions not funded by this grant and, therefore, not shown on this table) as indicated:

School Year	Lower RGV	Upper RGV	San Antonio	Austin	El Paso	Tarrant County	District
16-17	15	16	14	6			51
17-18	15	20	20	6			61
18-19	17	22	22	10	4		75
19-20	19	24	24	14	6	4	91
20-21	21	26	26	18	8	6	105
21-22	23	28	28	22	12	8	121

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. This is evidenced by the consistency of its demographics even as it has rapidly scaled and expanded. The table below provides “snapshots” every three years to illustrate trends<sup>26</sup>.

Demographics by School Year	2003-04	2006-07	2009-10	2012-13	2015-16
<b>Total Enrollment</b>	<b>499</b>	<b>2,073</b>	<b>5,515</b>	<b>12,567</b>	<b>23,525</b>
<b>African American</b>	0.0%	0.5%	0.6%	1.1%	2.6%
<b>Hispanic</b>	94.0%	91.9%	93.9%	95.4%	93.6%
<b>Economically Disadvantaged</b>	82.2%	68.0%	77.6%	83.5%	89.1%
<b>English-language Learners</b>	13.8%	31.2%	22.9%	26.4%	34.9%
<b>Special Education</b>	5.2%	5.2%	3.9%	4.3%	4.7%
<b>At-risk</b>	DNA	47.1%	40.5%	41.5%	49.4%

**That IDEA can grow at this rate while continuing to provided 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.**

<sup>26</sup> 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.

## ***IDEA Individualizes Instruction for Educationally Disadvantaged Students***

IDEA assists educationally disadvantaged students in mastering State academic content standards and State student academic achievement standards in a variety of ways (**Application Requirements E1 and K**). Full inclusion has always been IDEA’s approach, which has served students well for the past 16 years—even more so as of 2014-15 when learning disabled students in Texas became ineligible to take a modified standardized state test.<sup>27</sup> All students needing special services, whether for learning or linguistic differences, are served in the regular classroom wherever possible and in accordance with their Individual Education Plans (IEPs) and, for students with disabilities, in accordance with all requirements of IDEA (**Application Requirement J**). **With the exception of severe/profoundly disabled students requiring Life Skills or other self-contained learning environments, all special needs students are accommodated in the regular classroom with rigorous, college-preparatory (including AP/IB) instruction, advanced course testing, and related high expectations from all adults on campus.** These students receive individualized support through targeted resources, accommodations, extra help, and training so they can complete the same work and curriculum as their IDEA peers

IDEA supplements teaching methods and caters to the learning styles of every student, but does not lower the learning expectations for any student. Each of campus educates students who are English Language Learners (ELL) and/or receive 504, Homebound, Dyslexia, or Special

---

<sup>27</sup> Only students classified as intellectually disabled will be allowed a modified test. ELL students who have been in the US for three years or less will take the STAAR-L, which includes linguistic accommodations. After three years, they will take the regular state exam.

Education services, which include Autism and Down-Syndrome accommodation. IDEA special education teachers utilize the Response to Intervention (RTI) process to service students who receive a specialized learning plan. This RTI plan documents student-response to interventions and accommodations on a daily basis, so that teachers know what practices work for each student. In addition, support for students with special learning needs is provided through individualized academic coaching by expert special education teachers who maintain constant communication with families.

Students who are significantly behind in math or reading participate in college-preparatory classes alongside students at or above grade level but leave the classroom for the last 30 minutes of a 90-minute period, as needed, to be served by Content Mastery teachers who individualize and accelerate their instruction in order to ensure mastery of the TEKS (Texas state content area standards).

Additionally, IDEA created **Critical Student Intervention (CSI)** to help students in reading or math—often new IDEA 6<sup>th</sup> graders who are multiple grade levels behind but also those with IEPs—gain as much as two years of academic growth per year. CSI assists students in a small-group setting (1:10 teacher to student ratio) while their classmates are attending elective courses. This is another way IDEA provides every student with high-quality personalized instruction, which allows high performers and students with disabilities to accelerate learning at their pace.

IDEA tracks data for all students participating in CSI across the district including growth over the year. The goal is for CSI students to gain one year of academic growth in each subject by the middle of the year. So far in 2016-17, 56% of CSI students have achieved this in math and 48% have achieved this in reading, while **36% and 28%, respectively, achieved 1.5 years of growth**, and **25% and 14%, respectively, achieved two years of growth**. This proves

IDEA's individualized attention to student academic growth and achievement get unparalleled results for students in need.

### ***IDEA Gets Educationally Disadvantaged Students College and Career Ready***

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.<sup>28</sup> This year, 32% of IDEA seniors have already been accepted to a Tier I or II college or university, including those in the Ivy League (Appendix I.7.) Understanding that the first year of college matriculation is one of the most critical, IDEA tracks milestones through the fall of sophomore year, as research shows that these first three semesters are the most critical in a college student's likelihood to graduate. Such milestones include; freshmen persistence to the spring semester, reenrollment and attendance in fall of the sophomore year and continuous full-time student status. As the focus on college graduation continues to be the mission-driven final outcome of IDEA's work, IDEA invests in a support team for graduates. This team's work is focused on **1) College Counselor effort educating students** on the benefits (greater resources, higher graduation rates, greater personal attention) of attending highly selective colleges and positioning students to find their best match-fit university with the most compelling application package; **2) Bold coaching and support in securing financial aid** and working in close partnership with families; and **3) Alumni Affairs' efforts prioritizing the transition points** from matriculation freshman year, to spring and sophomore to junior year. IDEA is hard at work

---

<sup>28</sup> 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>.

formalizing partnerships with St. Mary's University, Austin College, Beloit College, Colby College, and the University of Texas Rio Grande Valley and working out MOUs that ensure IDEA students get the counseling and support they need to persist through college while IDEA has access to the data it needs (in accordance with federal and state privacy laws) to actively monitor the success of its graduates. The impact of their work can be seen in the increase in students persisting in college (see table, page 23).

## C. EVALUATION PLAN

In the past seven years, IDEA Public Schools has been awarded a variety of federal and state grants all with their unique aims and scopes of work. Throughout this time, IDEA committed over \$3 million in grant funds across eight grants to partnerships with 3<sup>rd</sup> party evaluators. The work of IDEA's evaluators is both formative and summative, as IDEA aims to understand how implementation can be improved, and the impact of the innovations. This history of rigorous evaluation is evidence of the integrity with which IDEA stewards federal funds and the great deal of attention paid to quality in its programs. Most recently through 2014 and 2016 CSP awards, IDEA committed to evaluate its ability to replicate and expand. The aim of this five-year study is twofold: 1) to understand whether the supports in place for new schools are effective, and 2) to evaluate whether school model adaptations are done with fidelity. Research shows that the success of these two areas is critical to a successful school launch<sup>29</sup>. At the time of this application, the 2014 CSP grant is only in its second full year of project evaluation; much remains to be learned from this massive effort. The lessons learned from SRI's study pertain to the entire district, and all future expansions sites, including the schools in this proposal.

### Metrics

---

<sup>29</sup> <http://credo.stanford.edu/pdfs/CGAR%20Growth%20Executive%20Summary.pdf>

To achieve IDEA's theory of change (see corresponding **Logic Model**, Appendix I.22), replication and expansion efforts must be executed with incredible fidelity to the proven IDEA model and with an intentional focus on key organizational priorities. The following **organization-wide goals and targets** will be tracked by the senior leadership team over the five-year project period; all tied to the individual goals of every IDEA professional:

<b>GOAL 1: ACHIEVE COLLEGE-READY STUDENT RESULTS</b> <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	2017-18	2018-19	2019-20	2020-21	2021-22
% of PK/K students on/above grade level in reading   language   math (campuses in operation year 2+)	80   90   90	82   90   90	84   90   90	86   90   90	88   90   90	90   90   90
% passing   % commended on state exam/end of course (all tested grades)	80   20	82   22	84   24	86   26	88   28	90   30
Average ACT score	20	20.25	20.5	20.75	21	21.25
% of graduates named AP scholars (3 scores of 3 or +)	25	27	29	31	33	35
% 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	99	99	99	99	99
% of students graduating college in 4   6 years	25   35	27   37	29   39	31   41	33   43	35   45
<b>As required, IDEA will report annually on % of 4<sup>th</sup> and 8<sup>th</sup> grade charter schools students performing at or above the state level in mathematics and reading. Benchmark: 4<sup>th</sup>- Math 79.9%, 78.1% Reading; 8<sup>th</sup>- 91.4%, 90.6%</b>						

<b>GOAL 2: BUILD A STRONG AND SUSTAINABLE ORGANIZATION</b> <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	2017-18	2018-19	2019-20	2020-21	2021-22
% Employee Retention	80	80	80	80	80	80
% Average Daily Attendance	97.5	97.5	97.5	97.5	97.5	97.5
Annual Surplus (in millions) to support financial strength and access to facilities funding	\$20	\$22	\$20	\$32	\$41	\$59
% Student Persistence (all students)	90	90	90	90	90	90
<b>Will report annually on the federal cost/student for schools in operation 3+ years. Benchmark: \$1,460</b>						

<b>GOAL 3: ACHIEVE THE MISSION AT SCALE</b> <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	2017-18	2018-19	2019-20	2020-21	2021-22
Enrollment (increase by 26,473 students)	29,334	34,246	40,253	48,018	53,769	55,807
CSP-funded schools in operation (20 expansion/47 replication schools opened)	--	20   10	20   20	20   34	20   46	20   46
<b>Total schools in operation</b>	51	61	81	95	107	107
% of students with low socio-economic status	80	80	80	80	80	80

## Internal Evaluation Staff, and External Independent Evaluation Contractors

In order to continue to learn through growth in new markets, IDEA's existing CSP Program Evaluator and the Quantitative Research Analyst will continue to partner with Copia Consulting LLC (sub-contractor to SRI 2014 study; contract attached in Appendix I.23 from CSP 2016) to

carry out formative research specifically related to IDEA's growth and provide professional development to the growing IDEA

Research and Evaluation team. The

greatest benefit to building out this

team is for IDEA to have access to

more real-time actionable

recommendations to inform program

iterations and improve their model to

continue to increase academic performance for students. The lessons learned and research

conducted during existing CSP grants will be leveraged so that IDEA's R&E team can continue

the studies to include IDEA's growth from 2017-18 through 2021-22 expansion. This transfer of

knowledge and business partnership will be led by the IDEA CSP Program Evaluator (existing

FTE). She will act as a lynchpin, uniting the findings and the corresponding activities from the

2014 (SRI), 2016 (Copia and Professional Development) and 2017 (Internal R&E) teams. The

Director will study the products of 2010, 2014 and 2016 evaluations to produce the detailed

scope for the 2017 evaluation which will be executed by the internal R&E team. In order to

significantly reduce (and even eliminate) any internal bias—however unintentionally added—

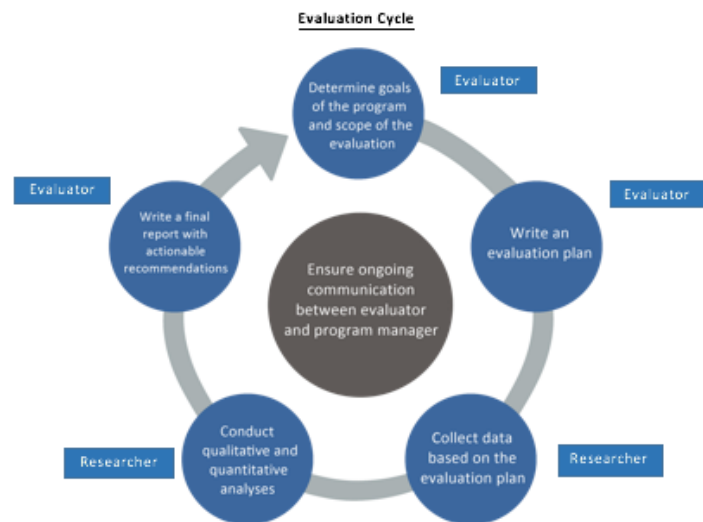
**Copia will continue to conduct its independent evaluation of IDEA's growth and expansion strategies funded by previous Charter School Program grants while this team ramps up.**

**In addition, the CSP Program Evaluator will work with SRI and Copia, remaining**

**separate from the Research and Evaluation team by reporting to a different manager in**

**order to keep a proverbial Chinese Wall between the two operations, also helping to**

**remove unintended bias.** IDEA is creating a sustainable evaluation model by gradually



bringing evaluative work in-house. IDEA’s plan is to staff the following three full-time positions in year 1, then adding an additional Manager of Program Improvement and Evaluation in year 2 and an additional Research Manager in year 3:

1. **Data Integrity Analyst:** Ensure that all data required for CSP evaluated programs is clean, ready for analysis and is available and complete, including the data needed to carry out the CSP evaluation;
2. **Research Manager:** Provide information support to program leaders and data analysis to ensure successful studies can be conducted in partnership with the Manager of Program Improvement and Evaluation; and
3. **Manager of Program Improvement and Evaluation:** Provide vision and leadership in program evaluation by planning, developing, and coordinating research, analysis, measurement, and reporting of CSP evaluated programs in order to provide high quality, well-focused research-driven recommendations for IDEA’s achievement priorities.

Please see Appendix B for a more detailed table of responsibilities for each of these three positions as well as Appendix I.24 a Year 1, 2 and 3 organizational chart showing lines of reporting and interaction for the complete Research and Evaluation Team. IDEA’s evaluation, which will build

off of the 3<sup>rd</sup> party evaluations underway and will be submitted to the Ed Dept. and will 1)

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?



describe the replication of the IDEA school model in the new region of Tarrant County/Fort Worth; 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 in the graphic above.

Using data from IDEA's 2014 CSP Replication and Expansion grant evaluation conducted by SRI Consulting and from the first year of IDEA's 2016 CSP grant, the R&E team will compare the campus outcomes from campuses launched in 2017-18 through 2021-22 with those established in 2014-15 through 2018-19 and 2016-17 through 2020-21 to identify both increases and decreases as well as correlational factors such as region, to the extent possible.

## **Research Design Overview**

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 55) evolve in response to specific replication and expansion schools' needs. The 2017 study will also illuminate issues of scale as IDEA increases from 51 to 143 schools during the grant period. IDEA will utilize data and interview information collected from the 2014 and 2016 CSP studies so as not to be redundant and will focus evaluation on key issues in the 2017 CSP regions.

One critical component of the Case Study (conducted by the internal Research and Evaluation team) will be a focus on IDEA's initiative to establish increased internal quality controls by adding a new (in 2016) capacity charged with conducting both qualitative and quantitative analyses designed to reveal both successes and challenges quickly so that they may either be promoted or resolved. These analyses will be centerpieces of the IDEA's internal 2017 evaluation.

To build up the R&E team, Copia will provide, as committed in the 2016 CSP grant, extensive professional development on research/quality control activities to the two 2016 CSP-funded roles (there will be no cost to the 2017 grant). The professional development sessions will include topics such as; developing observation tools and interview protocols; conducting surveys, interviews, and focus groups; developing qualitative data analysis protocols; analyzing qualitative/quantitative data and applying the results; producing brief formative and summative memos; and producing graphics highlighting key takeaways for clear communication to teams and leaders. Professional development sessions and shadow/observe opportunities will continue throughout the evaluation period, adapting and changing based on identified organizational needs and, in the end, helping IDEA build a more robust in-house program evaluation team. Copia will utilize findings from the first three years of their 2014 Charter School Program grant evaluation and the first full year of the 2016 CSP grant to inform the professional development, and IDEA will continue to use these results for comparison purposes throughout the life of the 2017 grant.

**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 CSP Program Evaluator 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 divers 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.** Copia is developing 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. Copia will identify relevant reliable teacher survey scales such as school leadership, instructional practices, 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 R&E team will 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 2017 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&E 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&E 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 produced by Copia for the 2016 award (through year 4 of this grant period) and the IDEA R&E team for the 2017 award 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 such as webinars, practitioner briefs, and policy briefs.

IDEA’s successful project evaluation experience, together with its consistent use of the highly qualified external evaluation team 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 addition, of internal researchers and evaluators 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, in the end, improve academic outcomes for its students.

## **D. MANAGEMENT PLAN AND PERSONNEL**

This section reviews IDEA’s plan to **1) Implement a high quality management plan that will**

enable IDEA to reach the expansion goals articulated here on time and within budget; **2)** Support and sustain the new schools proposed in this application with a strong business plan (See Appendix I.25 for summary); **3)** Implement a proven, tested financial and operational model; **4)** Maintain quality by supporting all schools and turning around low-performing schools when needed; and **5)** Mobilize a team of highly effective personnel to manage the grant.

**(i) IDEA's CSP project management responsibilities, timelines, and milestones**

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.26 that illustrates the timeline of key **project management activities** and positions responsible, and see the following graphic for a complete timeline of **major school launch activities** by month (beginning 30 months prior to launch) and by team responsible.

Month	# Months from Launch	Major Launch Activity	Team Responsible
JAN	30	New Region Approved by Chiefs	Growth
		1/3 Philanthropy Committed	Advancement
FEB	29	Board Confirms New Region	Growth
		Executive Director (ED) Hired for New Region	Human Assets
MAR	28	Board Members Recruited	Local ED
		Board Meets to Incorporate	Local ED
APR	27	Land Identified for All New Schools	Operations
MAY	26	PR Announcement for New Region	Operations
		Principals in Residence (PIRs) Identified for New Region	Human Assets
JUL	24	PIRs Begin as Full-time Staff	Human Assets
SEP	22	Founding Teacher Fellows Recruitment Begins	Human Assets
NOV	20	Land Closed	Operations
DEC	19	PIRs Selected as Principals for schools set to open next school-year	Human Assets
JAN	18	2/3 Philanthropy Committed	Advancement
		Auxiliary Plan for Transportation Services	Operations
		Design Begins	Operations
FEB	17	Auxiliary Plan for Health Services	Operations
MAR	16	100% Funds Committed	Advancement
		Auxiliary Plan for Child Nutrition Services	Operations
		Texas Charter Amendment Submissions	Finance
MAY	14	Zoning and Entitlement Process Begins	Operations
		Auxiliary Plan for Beginning of Year Projects Initiated (see Appendix I.27 for detailed list of items)	Operations
		Auxiliary Plan for Logistics Services Initiated	Operations

Month	# Months from Launch	Major Launch Activity	Team Responsible
		Next Cohort of PIRs Identified	Human Assets
JUN	13	All Funds from New Regions Deposited for Operating Budget	Finance
JUL	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	11	Marketing Begins Recruitment Campaigns	Operations
SEP	10	Teacher Recruitment Launches	Human Assets
		Financial Model Update	Finance
		Student Recruitment Plan Initiated (7 Month Campaign)	Operations
DEC	7	PIRs Selected as Principals for next round of school openings (year 2 of grant)	Human Assets
JAN	6	Teacher Interviews Begin	Human Assets
		Principals Launching New Schools Become Rhodes Fellows to Plan School Vision via Training/ Professional Development Cohort	Human Assets
APR	3	Lottery Held	Operations
MAY	2	Teachers Hired	Human Assets
		Welcome to IDEA Event	Operations
		6 <sup>th</sup> Grade Culture Camp Program Completed	Achievement
JUN	1	Student Registration	Operations
		New Employee Onboarding Begins for All New Regional Staff	Human Assets
AUG	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**. Data types, instruments and systems, and frequency of data collection and analysis is outlined below. Please also see the Evaluation Plan.

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)

***(ii) IDEA's highly qualified, experienced project team***

IDEA's VP of Financial Planning, Leanne Hernandez (see resume in Appendix B), will serve as the **Project Director**. Together with support and assistance from IDEA staff, Leanne currently directs and successfully manages the 2014 and 2016 CSP grants. The Research and Evaluation team will provide comprehensive internal evaluation support for this CSP initiative. The **third-party evaluator** will provide guidance and inform the grant leadership team with findings from both 2010, 2014 and 2016 CSP grant project implementations to date. Please see Section C for more information on the evaluator's role and Appendix B.

Unique to IDEA and its grant management model is the **GrantEd Team**, whose purpose is to ensure fidelity of program implementation across all schools. GrantEd is a team of 11 grant managers who meet monthly to share best practices in grant management and learn from one another's projects and efforts. Led by IDEA's Grants Director, 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.

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 report directly to the Chief Financial Officer and 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. She manages EDs and VPs of Schools. 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 and was appointed to President Barack Obama’s White House Commission on Educational Excellence for Hispanics in 2010.

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 co-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.”

**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.

**Wyatt Truscheit, the Chief Financial Officer,** oversees the business office. This office manages financial operations, critical to the day-to-day function of the 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. As CFO, Wyatt is also charged with managing public offerings in excess of \$300,000,000 in bond financing and maintaining IDEA's bond rating of AAA based on the Permanent School Fund to secure facilities funding since this is not accessible via the State.

**Sam Goessling, Chief Advancement Officer,** leads private and public fundraising and donor relations. 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 173 schools by 2022. Sam oversees more than \$100M in grant funds in recent years.

**Misty Martin, Chief Administrative Officer,** oversees IDEA's Human Resources, Legal, Regulatory Compliance, Staff Relations, Substitute Teacher Program, Benefits, Compensation and Payroll, and Organizational Development functions. The CAO team ensures all schools and employees are supported and are in compliance with all applicable regulations. Misty is a certified Senior Professional in Human Resources® (SPHR).

**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.

In addition to these Senior Leadership Team members, this CSP project is supported by two co-VPs of Schools in Austin and high-quality **Executive Directors** in the Rio Grande Valley, San Antonio, El Paso, Baton Rouge<sup>30</sup> and Tarrant County (to be hired). Please see the Appendix B for the Executive Director job description as well as for the resumes for all positions noted here. An organizational chart detailing regional support at scale is in Appendix I.28.

***(iii) IDEA’s business plan for improving, sustaining, and ensuring the quality and performance of charter schools beyond the initial period of Federal funding***

From its inception, IDEA has been very intentional about designing a relationship between IDEA schools and the HQ team that maximizes school quality while supporting rapid growth of the network. IDEA centralizes functions that benefit from scale and efficiency, while ensuring that principals have the support and autonomy needed to make campus or region-specific decisions. To meet its goals of scale and quality, the IDEA central office, or headquarters (HQ) team, provides schools with critical operational and instructional support, allowing school leaders to focus on developing their staff and driving ambitious student achievement results (**Application Requirement F**). The HQ team supports all IDEA schools in four key ways: **A)** Providing new school start-up services for all new schools including facilities acquisition; **B)** Accessing top talent for all school leadership, instructional, and operational roles; **C)** Providing ongoing academic, financial, and operational support via a strong central office; and **D)** Ensuring

---

<sup>30</sup> IDEA Baton Rouge’s expansion and replication schools are not funded with this grant request.

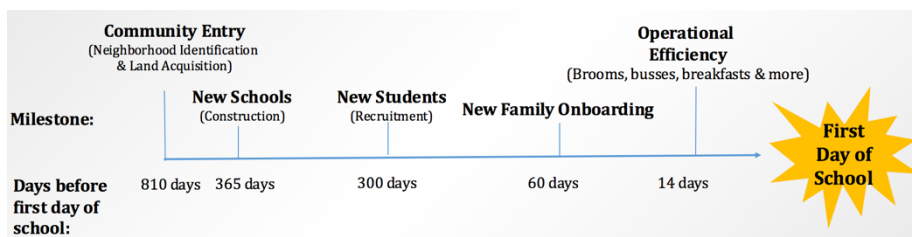
effective governance and oversight. The org chart in Appendix I.29 summarizes the current HQ and Regional teams’ organizational structures and services provided to schools.

***A) Providing new school start-up services for all new schools including facilities acquisition***

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. IDEA has one charter, issued by the Texas Education Agency, and files amendments for expansion, which have been approved each year. To meet its goals of scale (143 schools total by 2021) 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—detailed on pages 44-45 and summarized below.

***Launching a New***

***IDEA School***



***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.

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 or re-opening of all schools. Please see Appendix I.27 for Operations Checklist of new school start up tasks.

With 51 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. 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.30 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 the case of the San Antonio, Austin, and Tarrant County regions, IDEA has and will continue to assume the same approach, while being opportunistic when considering repurposing existing buildings, as it is roughly 25% less expensive than building from the ground up in these regions. Although there are few such opportunities in the Rio Grande Valley, IDEA expects that a larger, urban market will allow for repurposed sites as they have taken advantage

of in Austin—for example, converting a bowling alley into a school.

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.31 for more detail on how IDEA efficiently manages its facilities.)

## **B) Accessing top talent for all school leadership, instructional, and operational roles**

***Human Assets Team:*** The Human Assets office leads IDEA's efforts to attract, develop, and retain highly talented and committed educators. Prioritizing and elevating the strategic human capital efforts, this team reflects an understanding that human capital is IDEA's most important and most precious asset.

Developing end-to-end human capital practices is a shared responsibility among all district leaders. Principals, assistant principals, and other managers in the field are best positioned to impact the actual performance and experiences of staff members, especially as IDEA grows. Therefore, every manager in the organization receives training to continually improve their hiring, coaching, and retention practices and is supported in doing so by the Human Assets team.

The Human Assets team manages recruitment, selection, onboarding, staff development, evaluation, and staff retention.

For new schools, the Human Assets office first and foremost plays a critical role in teacher hiring. The Human Assets Office's main goal in teacher hiring is to screen as many high quality candidates as possible for principals so that they have a wide pool of highly qualified applicants from which to choose. **Currently IDEA receives seven applicants for every teacher opening.**

In support of new region growth, IDEA is also instituting a **Founding Teacher Fellowship** (see Appendix I.32 for an overview), which will place dedicated and mission-aligned individuals from new IDEA regions in full-time instructional positions in San Antonio or the Rio Grande Valley for one year. If successful, these fellows will return to the new IDEA region to found an IDEA school as a lead teacher for the following year. To ensure the best possible outcomes for this program, IDEA is partnering with **Relay Graduate School of Education** to provide intensive coaching and training for its Founding Teacher Fellows. In addition, IDEA's **Directors of Leader Development** will help coach and work with Principals in Residence to prepare them for school leadership using IDEA's School Leadership Levers rubric (see Appendix I.33) to assess their readiness and areas for continued development and growth.

In addition to an i3 grant in 2010 to create these human capital systems IDEA also received an Educator Excellence Innovation Project (EEIP) grant from the Texas Education Agency which it used to further develop its Teacher Career Pathway system of recognition and reward. The purpose of the EEIP is to improve educator effectiveness in Texas public schools through the funding of innovative practices that target the entire timeline of a teacher's career. IDEA's innovative approach has greatly increased districtwide teacher retention and overall

	2012-13	2013-14	2014-15	2015-16
# Teachers	576	676	852	1,044
Retention Rate	72%	76%	84%	85%

staff satisfaction even as IDEA's teaching force more than doubled.

### ***School-based Leadership and Responsibilities***

**Principals:** Each PK/K-12 site has two principals: one for the elementary (Academy) school, and one for the secondary (College Prep) school. All principals are managed by Vice Presidents of Schools who oversee a portfolio of IDEA schools based on geographic region. The VPs of Schools report directly to the regional Executive Directors, who in turn, report to the Superintendent, and the entire school leadership team's focus is on teaching to realize gains in student achievement. Principals' time is best used as a talent cultivator: hiring the best teachers, overseeing their development and training on how to implement the IDEA curriculum and intervention model, observing classroom instruction and providing consistent, direct feedback to improve teaching to ultimately impact student performance. Using IDEA's Interim Assessment data, principals are able to pinpoint the specific objective a class is failing to master and provide coaching for the teacher on re-teaching the objectives and identifying the students that would benefit from individual intervention and/or remediation.

**Assistant Principal of Operations (APO):** Both campus principals collaborate to hire an APO to oversee non-instructional employees and non-instructional operations and processes across both schools. The APO ensures that all logistical needs are met so the principal can stay focused on her essential duties as the instructional leader and culture builder. To aid in this, the EDs oversee Regional Directors of Operations who work directly with their regions APO's from all schools to problem-solve challenges, provide professional development and ensure seamless integration of CMO services, best practices and campus needs.

In addition to the principal and campus shared APO and facilities manager, each Academy has an interventionist who supports individualized learning, an academic counselor, and an

Assistant Principal of Instruction (API) who supports the principal in building teaching practice among the faculty. Full scale College Preparatory campuses have a college counseling team made up of a Director and three counselors (at least two of whom also teach AVID high school courses), and two APIs. Both school models have standard staffing structures (see Budget Narrative) that enable them to implement the IDEA program with fidelity. Principals own their staffing and budget decisions and are empowered to alter staffing plans to meet their needs with HQ team input and approval.

**C) Providing ongoing academic, financial, and operational support via strong 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 schools only 8% in CMO fees annually. **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 more results with less overhead than most any other district or charter school.

***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. Reflective of their respective sizes, Austin has two SVPs, one focused on instruction and one on external partnerships and growth while other regions have Executive Directors overseeing the region. 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 works to identify schools not meeting IDEA standards so that the CMO team may help get the school back on track. In most cases this means providing technical assistance to school leaders and more training for teachers. In rare cases it will include replacing the school leader and a significant portion of the teaching staff. In a true worst-case scenario, the school will be closed.

For schools not meeting high standards of quality, IDEA Public Schools first utilizes the “Turnaround method.” At the end of the 2008-09 academic year, after student achievement, financial, and human resources data indicated that IDEA Frontier was significantly lagging behind the IDEA’s high academic and operational standards, the Superintendent exited the previous principal, turned over the majority of teachers, and installed new leadership and teachers who have 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, 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 15<sup>th</sup> best high school in Texas and 79<sup>th</sup> in the nation by the US News and World Report.**

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, transportation, 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. 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” slide in Appendix I.34 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 (Skyward) used by each campus, which directly rolls up to the central system to 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.

**D) Ensuring effective governance and oversight.** IDEA Public Schools is a nonprofit, 501(c)3 organization. All IDEA schools in Texas are under one charter granted by the Texas Education Agency (TEA), which is overseen by one governing board. The TEA Commissioner approves all new charters as well as expansion amendments and has the power to revoke a charter for underperformance or financial mismanagement. The State Board of Education advises the Commissioner on new charter approvals.

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. Like all public schools in Texas, 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 board also plays an important role in community engagement and fundraising. (See Appendix B.)

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 builds high-quality advisory boards for each region. 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. 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.

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 H.** See Appendix I.35, 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.36). 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 also helps parents advocate with their elected officials for charter and equitable funding so they can have an even broader impact on charter school policies and operations statewide. To this end, IDEA’s school and regional leaders educate parents on their rights and discuss and explain talking points parents can use when expressing their views. In this way, IDEA helps parents advocate for their child as well as for other children to have an equal opportunity for a high-quality charter education.

### **IDEA’s financial and operating model; stakeholder commitment and support**

IDEA has an investment grade credit rating of BBB Stable Outlook with Standard & Poor’s and IDEA’s Texas Permanent School Fund Guarantee application for \$126 million in new money and refunding was approved in the spring 2016 by the state of Texas. IDEA funds construction costs by issuing bonds and this guarantee and AAA rating, backed by the state, will save IDEA roughly \$15 million over the life of the bond due to lower interest cost. IDEA’s 2015-16 FIRST rating (Financial Integrity Rating System of Texas) from TEA was “A-Superior” with a score of 96 (passing score was 31).

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							
Annual Gap for Schools of Each Type							
Phase	School Type	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	-\$4,016,626	-\$3,442,823	\$0	\$0
	Primary	-\$1,721,411	-\$10,328,468	-\$12,049,879	-\$10,328,468	\$0	\$0
Year 1	Secondary	-\$220,591	-\$1,102,955	-\$882,364	-\$1,544,137	-\$1,323,546	\$0
	Primary	-\$661,773	-\$3,308,865	-\$3,970,638	-\$4,632,411	-\$3,970,638	\$0
Year 2	Secondary	-\$63,189	\$0	-\$315,945	-\$252,756	-\$442,323	-\$379,134
	Primary	-\$189,567	\$0	-\$947,835	-\$1,137,402	-\$1,326,969	-\$1,137,402
<b>Total</b>			<b>-\$17,035,503</b>	<b>-\$22,183,287</b>	<b>-\$21,337,996</b>	<b>-\$7,063,476</b>	<b>-\$1,516,536</b>

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

## Demonstrated Commitment of Current and Future Partners

Over the past sixteen 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, and 2016, IDEA has raised nearly \$75 million 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: \$12,100,000; Ewing Halsell Foundation: \$10,005,000; Michael and Susan Dell: \$7,750,000; Walton Family Foundation: \$5,000,000; Bill and Melinda Gates: \$4,298,721; Brown Foundation: \$1,505,000; George W. Brackenridge Foundation: \$1,005,000; KLE Foundation: \$17,932,400. The Walton Foundation as well as local donors (see letters of support) are also providing funding to IDEA’s Tarrant County region.