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IDEA Public Schools: A Rapidly Replicating, High-performing Charter

IDEA Public Schools prepares students from underserved communities for success in college and citizenship and is committed to developing students with the academic, social, and leadership characteristics to apply, matriculate, and succeed in a four-year college or university.

Having won and successfully implemented a CSP Replication and Expansion grant in 2010 and 2014, as well as a 2012 Race to the Top District grant supporting IDEA's innovative individualized learning programming, IDEA is well positioned to embark on its next expansion phase. In doing so, IDEA can meet the community demand for high quality seats that is demonstrated by its **waitlist of 22,683 students**—*enough to fully enroll 14 new Pre-K – 12 sites (28 new schools)*. **IDEA is proving that through an evidence-based, individualized learning program and scalable school model, a high quality Charter Management Organization (CMO) can broaden its impact across rural areas, small towns, and urban communities while continually improving student achievement. (Absolute Priority 1)**

For the third year in a row, IDEA Public Schools has been selected as one of three finalists out of 20 eligible CMOs for the prestigious Broad Prize for Public Charter Schools, which honors the CMO that has demonstrated the most outstanding overall student performance and improvement among the country's largest urban CMOs in recent years while also reducing achievement gaps for poor and minority students. Data¹ analyzed to determine this year's finalists included student demographics; high school graduation rates; SAT/ACT scores and participation rates; Advanced Placement participation and passing rates; and performance and improvement on state standardized tests, including comparisons of CMO and state performance, proficiency and advanced proficiency trends, improvements and values, standardized residuals,

¹ http://www.broadprize.org/cdr/2014data_IDEA_TX.pdf

achievement gap calculations, numbers of students tested, and college-readiness measures.

Being publicly recognized by the Broad Foundation for the ongoing, high-quality work IDEA teachers and school leaders do to produce significant improvements in student achievement is an honor. IDEA has been validated by Stanford University's CREDO study, selected as a portfolio member of the Charter School Growth Fund, and had all seven of its fully scaled high schools ranked among the top 3% in the nation by both *U.S. News and World Report* and *The Washington Post's* index on most challenging high schools in America.² In September 2015, the White House Initiative on Education Excellence for Hispanics named IDEA a Bright Spot in Hispanic Education. (See Appendix H1 for more accolades.)

IDEA Public Schools, which currently serves a student population that is 89.1% economically disadvantaged (Absolute Priority 2 and Appendix E), will use CSP funding to further expand in San Antonio, replicate its model in a fourth Texas region (El Paso), and embark on its first replication in a high-need region outside of Texas (Southeast Louisiana, beginning with Baton Rouge). Over the next five years, the IDEA network will grow its high-performing CMO from 44 to 116 schools and will increase by 186% (from 23,387 to



² CREDO: <http://www.publiccharters.org/2013/01/study-credo-public-charter-school-growth-expansion-impact/>; US News: <http://www.usnews.com/education/best-high-schools/texas/districts/idea-public-schools>; Wash Post: <http://apps.washingtonpost.com/local/highschoolchallenge/schools/2016/list/national/>

66,769) the number of low-income, high-needs students it serves by 2020-21.

CSP funding will support IDEA’s growth by funding two expansion schools, 16 replication schools, and the addition of 5,545 new high-quality charter school seats during the funding period—14,117 new high-quality seats when all these schools are fully scaled.

Competitive Preference Priorities

CPP 1b—IDEA Supports High-need Students in Schools That Need Improvement

According to New Schools for Baton Rouge and data from the Louisiana Department of Education, **35,345 out of 58,219 public school students in this area of Southeast Louisiana (60.7%) currently attend a school rated C, D, or F.** This disparity is further exacerbated—and stratified—by race: **70% of minority students attend a C, D, or F school, while nearly 80% of white students attend an A or B school.**

Consistent with our philosophy of serving students most in need, we have chosen to focus our initial efforts in East Baton Rouge Parish, where 27 of the state’s 200+ Focus or Priority schools are located. After applying for a charter in March, the **East Baton Rouge Parish school district approved IDEA’s charter application in May** (Appendix E). As such, the public school district of **East Baton Rouge Parish is the local education agency allowing IDEA to replicate its academic model in the city**, thus providing a high-performing educational alternative for students who currently attend failing local district schools. In its own words, the East Baton Rouge Parish School System explained its partnership with charter schools:

*“Recognizing new and innovative ways of carrying out our mission, EBRPSS has become a charter authorizer. The district engages in pro-active relationships and a value-added approach to the schools **with which we partner**. During the start-up phase of the process, EBRPSS staff works closely with founding groups to ensure a successful opening. Once operational, EBRPSS*

staff monitors the financial and academic performance of its schools through frequent communication, regularly scheduled site visits, and data/ document reviews.”

By the time IDEA fully scales its Southeast Louisiana schools, approximately 15% of students attending low-performing schools will, instead, have access to a high-quality seat at IDEA. Therefore, **IDEA is partnering with East Baton Rouge Parish Schools to improve educational outcomes**—including student achievement, student persistence, high school graduation rates, and college preparation, matriculation, and success—for students attending schools in need of improvement in Baton Rouge.

Additionally, IDEA will intentionally establish schools in **El Paso** communities that have a long history of low academic achievement. These communities are located in the El Paso Independent School District near Henderson Middle school and in the Ysleta Independent School district near Hillcrest Middle School and Cedar Grove Elementary. These schools have recently been rated as Priority or Focus Schools by the Texas Education Agency and are located south of the I-10 highway, less than a quarter mile from the border. IDEA has met with leadership team members from the El Paso Independent School district and is in the process of structuring a formal partnership to serve students in that district and will investigate the possibility of a similar agreement in Ysleta.

CPP 2—IDEA Promotes Diversity

IDEA Public Schools is an open-enrollment CMO, currently operating 44 schools where students enroll after being chosen by lottery. No 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 95% Hispanic, 1.2% African American, 2.5% white, and 1.3% other races and ethnicities.

CPP 2a: Racial and Economic Diversity. IDEA is aware of research showing the benefits of racial and economic integration and is exploring ways to diversify its school populations, particularly new schools, in alignment with “Guidance on the Voluntary Use of Race to Achieve Diversity and Avoid Racial Isolation in Elementary and Secondary Schools”³. IDEA has a ten-year history of sending 100% of its graduates—students from all demographics and economic backgrounds—to college every year, and 2/3 of them 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. As IDEA expands in San Antonio and adds regions in El Paso and Southeastern Louisiana/Baton Rouge, it will increase its student diversity by strategically locating new schools to attract a racially and economically diverse student body. In addition, IDEA will work to recruit students from all communities by advertising with culturally specific media outlets such as radio stations with large African American audiences and by holding awareness and recruitment events all socioeconomic neighborhoods of the city—all without giving admission preference to students of any particular race, ethnicity, or economic background. IDEA Walzem Academy, in San Antonio, is an example of an ethnically diverse IDEA school whose demographics fit its ethnically diverse surroundings: 57.7% Hispanic, 28.3% African American, 10.3% white, and 3.7% other ethnicities with 82.6% of students from low-income homes. In Austin this approach has seen

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

African American enrollment increase in the past two years. IDEA Allan Academy in Austin, for example, enrolls 244% more African American students than the district average, and 50% more white students. Additionally, IDEA's Southeast Louisiana schools are expected to serve a majority African American population—at least 80% (as in East Baton Rouge Parish). In 2018, IDEA will locate a new school (funded with non-CSP money) in a mixed-income Austin neighborhood in order to further increase the CMO's overall racial and economic diversity while still adhering to IDEA's focus of serving first-generation college attenders. Please also see Appendix H2 for IDEA's Desegregation Plan, which includes Diversity, Equity, and Inclusion strategies. We will apply these strategies, and activities across all new regions as well.

Staff Diversity. 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 77% Hispanic and 7% African American. Principal in Residence (PIR) cohorts from the past four 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 80% in 2015-16.

Lastly, IDEA's teaching staff is 77.4% Hispanic, 17.6% white, 2.9% African American, and 1.6% Asian. This, too, will further diversify as IDEA expands into Southeast Louisiana and recruits a faculty that closely mirror the majority African American population it will serve.

CPP 2b: 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. IDEA also has multiple life skills classrooms across three regions and has seen a significant increase in the past few years of autistic, emotionally disturbed, and intellectually disabled students (See Appendix H7 for examples of programming for this student group). Overall, 4.7% of IDEA students are served by Special Education programs, but the district dedicates 7.2% 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. Three years ago IDEA had approximately 600 students served by Special Education. This number has since grown to over 1,600—proof that word is spreading about IDEA's program. As IDEA enters communities there is an education period to inform parents of the special populations programs and then a ramp up in enrollment occurs. IDEA has a smaller special education population in grades K-2 as nearly all students in these grades receive instruction through the differentiated Direct Instruction (DI) curriculum. This results in K-2nd grade having 27% fewer special education students than IDEA's average grade level and lowering IDEA's overall special education population compared to 8.5% the state serves, due to early support for IDEA students.

CPP 2c: Cultural and Language Diversity: English Language Learners. The proportion of IDEA students served by ELL programs (34.8% in 2015-16) is 16.6 percentage points, or **91%, higher than the percent of ELL students statewide** (18.2%). IDEA serves a greater percentage of ELL students than the region of San Antonio (11.4%), and it is anticipated that IDEA's El Paso replication schools will serve a population that is at least 26% ELL (the El Paso region's current ELL population). The ELL population in East Baton Rouge is less than 5%.

The graphic below 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 Served⁴

Indicator	IDEA	RGV Reg. 1	Austin Reg. 13	San Antonio Reg. 20	All TX Charters	State of TX
7. % Low-income	89.1	83.7	47.3	62.1	70.2	58.8
8. % English-lang. Learners	34.8	36.6	16.0	11.4	20.3	18.2
9. % Special Education	4.7	7.3	9.3	9.5	6.7	8.5
10. % African American	1.2	0.2	7.0	6.1	20.9	12.6
11. % Hispanic	95.0	97.5	46.9	71.1	56.8	52.0
12. % White	2.5	1.6	38.6	18.7	17.0	28.9

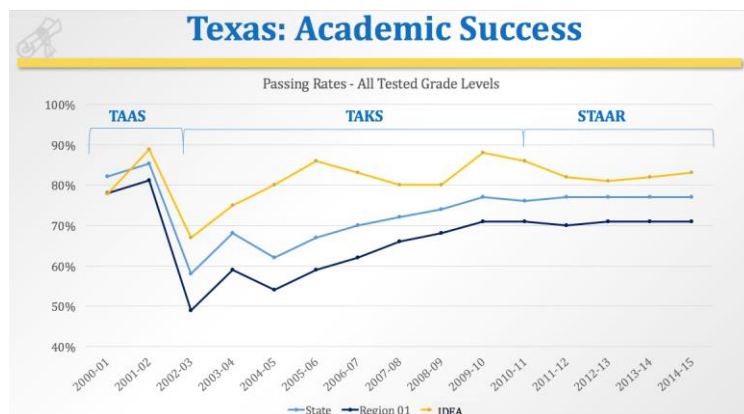
A. IDEA PUBLIC SCHOOLS: A HIGH-QUALITY CSP APPLICANT

IDEA deploys a cutting-edge elementary- educational model 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 to lead to college preparedness and graduation. Beginning with Pre-K leads to higher academic readiness, and IDEA will continue to prioritize the most academically at-risk students.*

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. (Appendix H16 for overview graphics on IDEA)**

⁴ Sources: Texas Education Agency 2014 Snapshot (all TX Charters) and 2014-15 Texas Academic Performance Report (all other columns).

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 without sacrificing the quality of education.** The graphic below shows state standards results growing over time and proves that **IDEA can rapidly replicate**



while maintaining a high level of academic quality with a majority economically/educationally disadvantaged population. 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.⁵ 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, evidence by 38% of the class of 2016 being selected to Tier I or II colleges (page 18).

⁵ <http://www.aei.org/files/2010/03/18/Rising-to-the-Challenge.pdf>

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 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 four times that national average for low-income students—35% vs. 8%.⁶** In fact, 20% of the flagship campus teaching staff are IDEA alumni.

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 2012-2013. In 2012, IDEA began its **second phase of expansion**, which included growing beyond the Rio Grande Valley into San Antonio and Austin. As noted in the following graphic, IDEA now operates 44 schools across three regions with plans to increase its impact by 264%, to 116 schools, by the end of this

⁶ Mortenson, Tom. "Bachelor's Degree Attainment by Age 24 by Family Income Quartiles, 1970 to 2009." <http://www.postsecondary.org>.

CSP project period.

Total Number of Schools in Operation (Cumulative)									
School Year	Lower Valley	Upper Valley	San Antonio	Austin	El Paso	Baton Rouge	Region 3	Region 4	District
15-16	14	16	10	4					44
16-17	14	16	14	6					50
17-18	14	20	20	6					60
18-19	16	22	22	10	4	4			78
19-20	18	24	24	14	6	6	4		96
20-21	20	26	26	18	8	8	6	4	116

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.⁷

IDEA’s current growth plan is ambitious but achievable. It is also necessary. In seeking to serve over 100,000 students by 2024, 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 the largest and most successful national CMO in the country.**

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. In 2015-16, IDEA saw 20,832 for 7,129 open seats, and the waiting list grew to 13,702. **For 2016-17, 31,997 applicants for 9,314 seats meant 22,683 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.** 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 the Rio Grande Valley and Central Texas and is now ready to expand west to El Paso and east to Southeast Louisiana. Also crucial to IDEA’s ability to grow

⁷ Please see Appendix H3 for more information on how IDEA selects school sites.

to scale with quality is its ability to identify, recruit, hire, and retain great teachers. Please see page 45 for how IDEA has been recognized and rewarded 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 dearth of high-quality public schools in Southeast Louisiana; the high poverty rate among Hispanic and African American students; the low rate of college completion for low-income students overall (8%); and the staggering college readiness achievement gap (21 points between white and Hispanic students in math and 22 points in reading)⁸. 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.⁹ 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 more dire: 6% and 9% of these regions' low-income students, respectively, will graduate from college as compared with 29% and 28% of students who are *not* low-income.¹⁰ **However, 78.8% of IDEA's low-income students have graduated from college.**

⁸ Source: National Center for Education Statistics, 2014 NAEP results.

⁹ From the ACT's reports on the Condition of College and Career Readiness:

<https://www.act.org/content/dam/act/unsecured/documents/CCCR-2014-Texas.pdf> and

<http://www.act.org/content/dam/act/unsecured/documents/CCCR-2014-Hispanic.pdf>

¹⁰ <https://www.texastribune.org/education/public-education/8th-grade-cohorts/about/>

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, both within and outside of Texas.¹¹ **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 15-year tradition of preparing students for college and citizenship.

IDEA Produces Evidence of Student Success

The Texas Education Agency data provided in the following graphic (as well as more extensive data provided in Appendix F) are discussed in subsequent subheadings referring to increasing achievement and attainment for all students, closing historic achievement gaps for subgroups, and results for low-income and minority students.

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 9) yet the vast difference in student achievement for these two comparison groups. IDEA serves a subset of students from Regions 1 (RGV), 13 (Austin), and 20 (San Antonio) yet achieves significantly better results across the board. This outperformance can be seen in in that every student takes the ACT and scores are comparable to the state where test-takers tend to be a subset of students. The same can be said for AP results, discussed further on page 18.

¹¹ Texas enrolls over 5,000,000 students, but only 203,000 of them (4%) attend an open-enrollment charter school.

INDICATOR	IDEA	RGV	Austin	San Antonio	State of TX
1. Annual Dropout Rate Gr 9-12 (2013-14)	0.0	2.6	1.3	2.9	2.2
2. 4-year Longitud Grad Rate (Class of '14)	98.0	87.3	91.5	86.9	88.3
% COLLEGE-READY GRADUATES (Class of 2014)					
3. English/Language Arts	78	60	73	69	68
4. Mathematics	78	63	72	65	67
5. Both Subjects	66	46	61	54	54
6. College and Career-Ready Graduates	97.3	83.3	79.0	77.9	78.4
AP/IB RESULTS (Class of 2014)					
7. % Tested	84.6	26.2	29.9	26.3	23.5
8. % At or Above Criterion	42.2	34.8	61.2	44.2	51.3
ACT PERFORMANCE (Class of 2014)					
9. % Tested	100	66.7	69.5	66.6	66.3
10. % At or Above Criterion	12.6	9.7	37.7	21.1	25.1
11. ACT Average Composite	19.1	17.9	22.2	20.2	20.6
COLLEGE SUCCESS (2012-13) <i>Most recent comparative data available</i>					
12. % Graduates Enrolled in a TX IHE	91.6	59.8	55.0	54.6	56.9

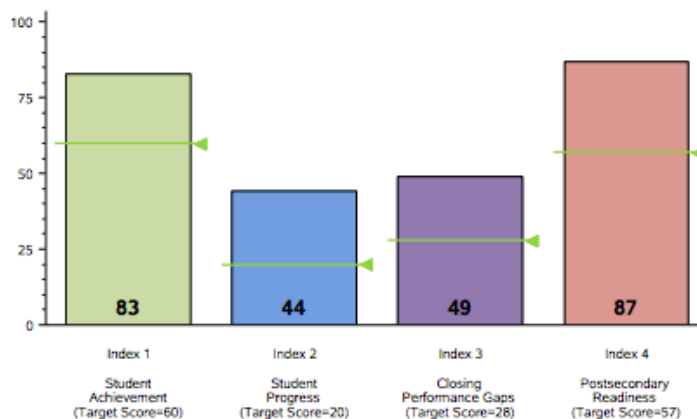
Program Performance Measure-4th & 8th Grade Achievement—By 4th grade, low-income students are typically two years behind their wealthier peers, and by 8th grade, low-income students have often slipped three years behind grade level. These statistics do not bear out at IDEA where 79% of students in 4th grade and 93% of students in 8th grade outperformed the state in reading in 2014-15, proving demographics are not destiny (see Appendix F; comparative math scores were not available for this year as a new test was introduced). 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 4th and 8th grade student achievement each year of the project period (benchmark 4th: 79.9% math/78.1% reading, 8th: 91.4%/90.6%).

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 F 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 closes achievement gaps regardless of educational or economic disadvantage.**

STAAR Percent at Phase-in Satisfactory Standard (Passing) or Above

Subject	IDEA			RGV			San Antonio			Austin			STATE		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
All Subjects	81	82	83	71	71	73	75	75	76	81	80	81	77	77	77
Reading	81	81	82	72	68	71	78	75	76	84	81	81	75	78	77
Mathematics	80	83	88	76	75	79	77	75	79	83	81	85	78	79	81
Writing	70	78	78	56	70	71	60	69	69	67	74	74	72	63	72
Science	87	86	86	75	74	75	80	77	78	85	83	82	78	82	78
Social Studies	87	85	86	67	69	72	76	75	76	81	81	82	76	76	78

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, Post-Secondary Readiness and Closing



Performance Gaps—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.**

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. Please see Appendix H4 for three years of attendance and graduation data by race/ethnicity as well. **IDEA outperforms the state in each indicator and for every comparative year.**

IDEA vs. Texas Results	IDEA				State ¹²		
	2012- 13	2013- 14	2014- 15	2015- 16	2012- 13	2013- 14	2014- 15
Attendance—All	98.20%	98.00%	97.53%	97.58%	95.80%	95.90%	DNA
—Low-income	98.82%	97.90%	97.55%	97.53%	95.40%	95.50%	DNA
—ELL	98.50%	98.20%	97.82%	97.95%	96.60%	96.60%	DNA
—Special Education	97.70%	97.50%	96.94%	97.09%	94.50%	94.60%	DNA
Retention ¹³	92.30%	92.80%	91.49%	91.52%	82.90%	83.10%	DNA
Class of:	2012	2013	2014	2015	2012	2013	2014
HS Graduation—All ¹⁴	98.6%	96.2%	97.1%	98.1%	93.7%	93.4%	93.4%
—Low-income	99.2%	96.1%	96.7%	98.0%	90.2%	91.5%	91.0%
—ELL	92.9%	96.3%	93.0%	97.0%	75.0%	76.3%	74.3%
—Special Education	100%	84.6%	90.6%	93.3%	88.8%	88.9%	88.8%

Indicators of College Readiness

Despite the large numbers of IDEA students taking the ACT exam (100%, see table on page 15), they performed 1.2 points ahead of all students in the Rio Grande Valley and only 1.5 points below the state ACT average, which (unlike IDEA) excludes one-third of all students—and

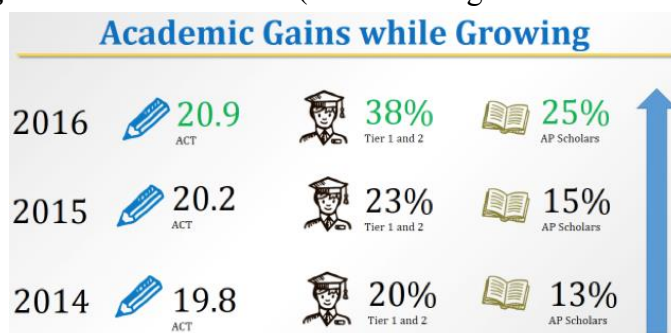
¹² State data for 2014-15 attendance and Class of 2015 graduation will not be available until November 2016. IDEA data for 2014-15 and 2015-16 attendance and Class of 2015 graduation are from IDEA's Data Analysis Team.

¹³ 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.

¹⁴ Excludes students who were retained and continued with IDEA, such as students with severe disabilities who will stay at IDEA until age 21 when they transition out. See Appendix H17 for IDEA's transitional plan that goes from an academic focus to independent living. Also included is an overview of the types of disabilities encompassed in the SPED population.

40.9% of low-income students—from SAT/ACT testing¹⁵. And current results are even more outstanding. **Four of IDEA’s seven high schools are achieving an average ACT composite of 21 or higher. IDEA’s Class of 2016 ACT average is 20.9, with 36% of students scoring above 23. Additionally, 38% of IDEA students were accepted to a Tier I or Tier II college or university, and 25% achieved the designation of AP Scholar** (IDEA’s designation for students earning scores of 3 or higher on at least 3 AP course exams). The graphic at right shows three years of data.

(1) IDEA increases achievement and attainment for all students



As previously stated, IDEA Public Schools serves a student population that is majority Hispanic (94.7%) and English-language Learners (34.8%) as well as economically disadvantaged (89.1%). This means **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

¹⁵ Texas Education Agency data for 2014-15: All students taking SAT or ACT—66.3%; low-income students taking SAT or ACT—59.1%.

has **more college-ready graduates** (E/LA: 78%; math: 78%; both subjects: 66%) and **more college and career-ready graduates** (97.3%) than any of the comparison groups. **Most notably in 2015, over 3 ½ times more IDEA students took AP tests than the state average (84.6% vs. 23.5%), yet proportionally more students passed those AP tests than students across the state.** For every 100 high school students IDEA enrolls, 84.6 took an AP exam in 2014 and 42.2% (or 35.7 students) passed. Compare this with the state’s 23.5 students per hundred who tested and only 51.3% (or 12 students) who passed. IDEA has since adopted an “AP for All” approach that will see *all* students—100%—take 11 AP courses by the time they graduate, with a goal of having 35% of high school students (up from 2016’s rate of 25%) become IDEA AP Scholars. **In 2015-16, 2,611 IDEA students took AP exams; 1,027 of them (39.33%) passed at least one.**

IDEA is also closing the achievement gap for **college enrollment**. **IDEA’s majority-minority, high-needs, low-income students enroll in public Texas institutions of higher education (see table below) at a rate of 91.6%—34.7 percentage points higher than the state enrollment rate of 56.9% for all students and 31.8 points higher than the Region I (RGV) enrollment rate of 59.8% for all Region 1 students.¹⁶** 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 49 on Index 3, 21 points ahead of the state target

¹⁶ Texas Academic Performance Report 2014-15. Up from 89.5% the year before.

score of 28 (see page 15). Again, please see Appendix F for detailed information regarding three years of evidence on the closure of achievement gaps for student subgroups (excerpted on page 21), and see the following table for three+ years of data showing IDEA sends more of its students to college¹⁷.

Graduates Enrolled in a Texas Institution of Higher Education (IHE)	IDEA			State		
	2010-11	2011-12	2012-13	2010-11	2011-12	2012-13
	84.7%	89.5%	91.6%	58.3%	57.3%	56.9%

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 nationwide¹⁸.

IDEA Results Only	IDEA		
	2012-13	2013-14	2014-15
College Matriculation (all colleges)	93.3%	92.9%	94.5%
—Non-Economically Disadvantaged	85.4%	85.7%	96.0%
—Low-income	95.1%	93.9%	94.3%
—ELL	76.9%	84.6%	95.0%
—Special Education	87.5%	81.8%	94.3%

¹⁷ 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.

¹⁸ 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. Since the NSC data is not all-inclusive, IDEA conducts its own audit to verify and confirm that 100% of students have matriculated to college. This has been the case for 9 out of the last 10 years of graduating classes. See Appendix H18 for the audit process and sample artifact.

IDEA Results Only	IDEA		
	2012-13	2013-14	2014-15
College Persistence/Graduated	52.2%	60.6%	87.4%
—Non-Economically Disadvantaged	55.7%	72.2%	87.3%
—Low-income	51.5%	59.1%	87.4%
—ELL	50.0%	36.4%	79.0%
—Special Education	42.9%	55.6%	82.6%

(2i) IDEA closes achievement gaps for all students (Criteria 2i)

IDEA Public Schools has ample evidence (presented in three years of additional detail in Appendix F) that it has significantly increased student academic achievement and attainment for all students as well as closed historic achievement gaps 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 2014-15 (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** (89.1% 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 ^A
STAAR Percent at Phase-in Satisfactory Standard or Above														
All Grades														
All Subjects	2015	77%	73%	83%	74%	83%	89%	83%	98%	100%	100%	47%	82%	71%
Reading	2015	77%	71%	82%	81%	82%	89%	82%	97%	*	100%	46%	82%	72%
Mathematics	2015	81%	79%	88%	69%	88%	90%	*	100%	*	*	48%	88%	80%
Writing	2015	72%	71%	78%	69%	77%	85%	*	96%	*	*	34%	76%	68%
Science	2015	78%	75%	86%	60%	86%	88%	*	100%	*	100%	58%	86%	76%
Social Studies	2015	78%	72%	86%	64%	85%	96%	*	100%	*	100%	52%	85%	62%

State of Texas

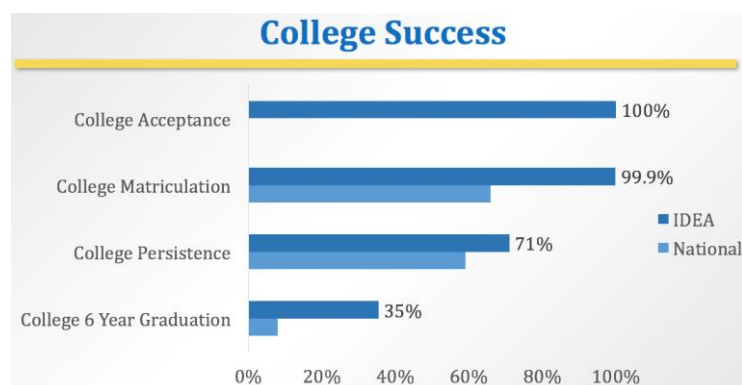
		State	African American	Hispanic	White	American Indian	Asian	Pacific Islander	Two or More Races	Special Ed	Econ Disadv	ELL [^]
STAAR Percent at Phase-in Satisfactory Standard or Above												
All Grades												
All Subjects	2015	77%	68%	72%	87%	77%	92%	80%	85%	43%	69%	55%
Reading	2015	77%	68%	72%	88%	77%	92%	79%	86%	43%	70%	56%
Mathematics	2015	81%	71%	78%	90%	80%	96%	83%	87%	45%	75%	59%
Writing	2015	72%	62%	66%	81%	71%	91%	79%	79%	29%	63%	54%
Science	2015	78%	68%	73%	89%	79%	93%	81%	86%	47%	71%	53%
Social Studies	2015	78%	70%	72%	87%	79%	93%	81%	86%	46%	69%	43%

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 subgroup¹⁹**. 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 F 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 9), yet its academic results are stronger overall.**

(3) IDEA produces outstanding results for low-income and minority students

¹⁹ In 2014, students with IEPs took modified (below grade-level) state exams in order to graduate. Now all students must take the regular EOC exam, so lower scores for these students is attributable to the change to the more rigorous exam requirement.

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 H5). Beyond IDEA's 4-year graduation rate of 98% (5-year: 99.3%) and in addition to multiple examples of IDEA's students post-secondary readiness (see table on page 15 and bar graph on page 16), the graphic below shows college acceptance, matriculation, persistence, and **6-year college**



graduation rates for IDEA alumni vs. all low-income students nationally.²⁰ **Most notably, an outstanding 100% of IDEA graduates have enrolled in college**

for ten years in a row²¹. Also as of this date, **71% of all IDEA students who entered college have already graduated or are still enrolled**, dramatically outpacing national averages for college attendance and college retention in low-income, Hispanic, and first-generation demographics. **Thirty-five percent of all IDEA alumni complete a college degree within six years of enrollment, compared to only 22% in Texas and 8% of low-income students nationally.** The evidence is clear: **IDEA is closing historic achievement gaps by sending more low-income, minority students to college.**

B. IDEA SERVES EDUCATIONALLY DISADVANTAGED STUDENTS

²⁰ IDEA data based on Clearinghouse report from April 2016 and Class of 2016 applications/matriculation. National benchmarks from NCES and Texas Tribune.

²¹ For one of these ten years, the figure was 99.9%

In the past 15 years, IDEA Public Schools achieved outstanding results for students while building an efficient, sustainable organization. As detailed on page 9, **IDEA’s student population is 89.1% low-income and 34.8% ELL—a highly educationally disadvantaged student body. In addition, 49.3% of all IDEA’s students are considered at-risk of dropping out of school** due to one or more social, economic, or academic factors. As is evident from previous data, 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).

The addresses of campuses in Schools Operated by the Applicant” (Appendix E) verifies that IDEA locates 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. 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. Two examples of this process in action in two different regions include IDEA Riverview, which is located in an impoverished community in the shadow of the U.S.-Mexico border wall with a large number of low-performing schools nearby, and IDEA Monterrey Park, located in west San Antonio between pockets of poverty in a community with large population growth. See additional information in Appendix H3 for the process IDEA uses to determine new IDEA regions.

IDEA Serves Students Needing Special and Bilingual Education

IDEA accepts all students through an **open-enrollment lottery** process (See Appendix H6 for student recruitment, selection, lottery, and admissions policies) 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—and has a web page dedicated to discussing these services²². 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, the services IDEA provides for its special needs students (Special Education and ELL) and to visit life skills classrooms (see blueprint in Appendix H19).

Pre-K-2 students participate in the Direct Instruction program, which has a broad level of programming resulting in few 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. IDEA has also seen a marked increase in its population of special education students qualifying for IEPs for emotional disorders and autism (Appendix H17). As a result of the “Welcome to IDEA” registrations events, public access to information about the district special education program, parent coalition, and distribution of IMPACT magazine. (See Appendix H7 for a recent article on IDEA’s life skills students. Articles like this one provided valuable information for parents on IDEA’s Special Education programming.) IDEA continues to increase its Special Education student enrollment. IDEA has worked to publicize its Special Education program by highlighting its students on social media and in

²² <http://c8ca6e5e43a19f2300e1-04b090f30fff5ccebbaaf0de9c3c9c18a.r54.cf1.rackcdn.com/2015-2016-IDEA-Student-Handbook.pdf>

information sent to more than 30,000 homes across IDEA's regions in its IMPACT magazine.

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 of each region IDEA serves. Special Education teachers are also present at each Welcome to IDEA event to welcome families and to discuss Special Education services and supports that are available to IDEA students.

IDEA's ELL population is 34.8%. The ELL population across the entire state, including charter schools, is 18.2%, yet **when compared with other charters throughout the state, IDEA serves 71% more ELL students by proportion** (34.8% vs. 20.3%). 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*.

IDEA Individualizes Instruction for Special and Bilingual Education Students

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). **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.** 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).

Full inclusion has always been IDEA's approach, which has served students well for the past 15 years—even more so as of 2014-15 when learning disabled students in Texas became ineligible to take a modified standardized state test.²³ Additionally, IDEA created **Critical Student Intervention** (CSI) to help students in reading or math—often new IDEA 6th 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 one way in which IDEA provides every student with high-quality personalized instruction, which allows high performers and students with disabilities to accelerate learning at their pace.

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.²⁴ This year, 38% of IDEA seniors were accepted to a Tier I or II college or university, including those in the Ivy League. Understanding that the first year of college

²³ 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.

²⁴ 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>.

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. The impact of their work can be seen in the increase in students persisting in college (see graphic, page 23).

Replication and Expansion Sites

With 22,683 students currently on the waiting list, IDEA will continue to launch open-enrollment lottery charter schools to ensure that families in all target communities have access to a high quality public education. For this CSP grant, **IDEA will expand two existing schools in San Antonio and launch sixteen replication schools—eight in El Paso, four in Baton Rouge, and four in Southeast Louisiana near Baton Rouge.** This will add a total of 5,545 high-quality, open-enrollment charter school seats (14,117 seats at full scale), which will dramatically increase the number of low-income college graduates from traditionally underserved communities in Texas and Louisiana.

The table below shows the plan to fund two expansion schools and 16 replication schools,

noting only their launch year (year 1 of operations).

Replication and Expansion Sites by Region

REGION	2016-17 Year 1	2017-18 Year 2	2018-19 Year 3	2019-20 Year 4	2020-21 Year 5
<i>Acad = Academy (K-5 or Pre-K – 5) CP = College Preparatory (6-23)</i>					
San Antonio	Carver CP S. Flores CP	Carver CP S. Flores CP			
Expansion Seats	171	150			
El Paso (EP)			EP Acad 1 EP CP 2 EP Acad 3 EP CP 4	EP Acad 5 EP CP 6	EP Acad 7 EP CP 8
Replication Seats			958	943	711
Baton Rouge (BR) and Southeast Louisiana (SE LA)			BR Acad 1 BR CP 2 BR Acad 3 BR CP 4	SE LA Acad 5 SE LA CP 6	SE LA Acad 7 SE LA CP 8
Replication Seats			958	943	711
Total Seats (Cumulative)	171 (171)	150 (321)	1,916 (2,237)	1,886 (4,123)	1,422 (5,545)
<i>When fully scaled, these schools will collectively enroll 14,117 students.</i>					

C. CSP EXPANSION AND REPLICATION PROJECT DESIGN

IDEA serves a high-need student population, as proven previously, in disadvantaged communities where the student success data is grim with only an 8% college graduation rate and a national 6-year community college graduation rate of only 15%²⁵ for low-income students. **IDEA’s students aren’t just going to college—according to the Texas Tribune, they’re graduating more than four times the national average for low-income students.**

The **logic model** in Appendix H8 depicts how the input components—many supported by evidence of promise—will ensure that IDEA realizes its ultimate mission to prepare students from underserved communities for success in college and citizenship. IDEA’s achievements have resulted in recognition from highly respected organizations (see Appendix H9 for Evidence of Promise) that confirmed, after assessing a variety of criteria including the CMOs’ success at achieving the short-term outcomes detailed below, that IDEA Public Schools is outperforming its

²⁵ <https://www.texastribune.org/2010/02/02/most-community-college-students-never-graduate/>

charter school peers and traditional independent school districts.

If IDEA continues to execute on its model, it will be able to **1) Achieve College-Ready Student Results** as measured by student growth, student achievement and college matriculation and success; **2) Build a Strong and Sustainable Organization**, evaluated by indicators such as teacher retention, average daily attendance and student persistence; and **3) Achieve the Mission at Scale** by growing schools and increasing the number of high-quality seats for low-income students. This will all be done through continuous replication while improving student achievement to create the transformation change in the communities IDEA serves.

IDEA Will Replicate and Expand a Cutting-Edge, Consistent Instructional Model

All curricula are vetted and approved by the program team before they are used in an IDEA school. Curricula that are not supported by formal research proving the validity, reliability, and impact of an approach are not implemented district-wide. The What Works Clearinghouse is one tool that IDEA utilizes to evaluate potential curricula.²⁶

Founded on a comprehensive review of research-based programs and practices, coupled with 3 years of student achievement data showing its hybrid model works, **IDEA is revolutionizing individualized learning at scale** (see Evidence of Promise Appendix H9), blending high-

²⁶ The others are 1) conversing, partnering, and reviewing best practices with other charters; 2) academic research and journals; and 3) internal pilot and reviews of impact before broad dissemination. These strategies supplement the WWC (<http://ies.ed.gov/ncee/wwc>) research as it is a relatively limited warehouse focusing on literacy and math with high barriers to entry in terms of the time to produce quality research, the expected rigor of the evaluations, and the resources necessary to be considered eligible for entry.

intensity, teacher-led instruction with student-driven learning, both complemented with technology-assisted, adaptive learning programs.

IDEA's Curriculum Model Builds Toward College Graduation

IDEA teaches on a K-16 continuum (adding Pre-K to new schools²⁷ upon launch and to existing schools on a phase-in schedule), which means everything IDEA does is focused on and aligned to the end goal of *college graduation*. IDEA's elementary, secondary, and college readiness/preparation programs, therefore, are not isolated; rather, each is the building block for the next. Early results adding Pre-K classrooms have shown promise closing academic gaps even earlier, leading to higher academic achievement overall.

In grades Pre-K-2, IDEA focuses on foundational learning, which heavily emphasizes basic literacy (fluency, decoding, etc.) and mathematics. In these grades, we use a combination of **Direct Instruction** (DI), led by teachers to accelerate student growth and academic achievement in literacy, and **personalized learning**, supported by highly individualized technology-assisted instruction. The DI model emphasizes carefully planned lessons presented in small increments and focused instruction around clearly defined teaching tasks. DI is based on the theory that, by using clear instruction and teaching to mastery, teachers can accelerate learning for all students—high performers as well as those with learning disabilities.

IDEA Public Schools has partnered with the **National Institute for Direct Instruction (NIFDI)** to faithfully implement the DI core curriculum. Teachers and school leaders receive

²⁷ Southeast Louisiana schools will begin with Kindergarten. IDEA is still exploring options for adding Pre-K in this area given local funding parameters around half-day and full-day schedules as well as family income levels.

ongoing support from NIFDI, including an extensive initial five-week summer staff development, ongoing school visits, and weekly data conference calls to discuss the progress of every student.

Personalized learning at IDEA features school wide use of adaptive technology programs such as DreamBox²⁰ and Reasoning Minds that tailor instruction for each student to his or her instructional level and customize remediation. Literacy instruction is supplemented with Accelerated Reader, which allows students to choose reading material appropriate to their individual reading level, as assessed by AR diagnostics and subsequent assessments.

This blended and individualized learning model differs from traditional elementary school instruction in that students are rapidly promoted to new homogenous lesson groups based on weekly data reports reviewed by teachers and school leaders. This system of continuous evaluation of mastery ensure that students are capable of growing more than one grade level in a content area in a given year.

In grades 3-5, Direct Instruction is used as a supplemental intervention for students who still need decoding and fluency help. Students continue to participate in personalized learning in mathematics to build their problem-solving and critical thinking skills and to incorporate more writing into this core subject. Language Arts instruction in these grades focuses on reading, writing, and crafting oral arguments. IDEA expects that all Academy students will leave fifth grade on or above grade level standards in reading and math, the achievement of which prepares them for success at IDEA's College Prep (secondary) level. **At all grades, K-5**, students also participate in physical education, science, and social studies in structured settings, but the focus at this level remains on math and reading.

Due to IDEA's unprecedented programming to support students to and through college, its

College Prep results in grades 6-12 far surpass those of surrounding traditional public school districts. Since IDEA's inception, 2,639 students have graduated from high school with 99.9% of graduates matriculating to a college or university.²⁸ Across the nation, only 45% of low-income students enroll in college—27% in a 4-year college, and 18% in a 2-year college. At IDEA, 90% of graduates (86% of whom are low-income) attend a 4-year institution and only 10% enroll in a 2-year institution. **IDEA's college-going rate is higher than that of the Noble Network (86%), KIPP (82%), and the average across the entire Charter School Growth Fund Portfolio (92%), not to mention the US average, which is only 64% of all students.**

Every College Prep campus implements a course schedule that ensures all students are prepared to do college level course-work, and in fact, they have the opportunity to do college-level coursework while still in high school. An overview of the courses that all IDEA students are required to take and some examples of additional coursework is provided in Appendix H10.

In addition to core content curriculum guides for math, science, English/language arts, humanities, and Spanish; providing instructional coaching to teacher leaders and high-need teachers; writing and study skills across the content areas (AVID beginning in 9th grade) an intervention period is utilized at all IDEA schools in grades 8-12. This daily 60-minute instructional block is coordinated by a campus interventionist who reviews recent formative assessment results and places students into groups with an appropriate intervention based on current data. Some student learning needs are addressed through larger groups working with individualized software while other needs are met through small group tutoring with highly

²⁸ This statistic does not include students who have chosen to delay matriculation in order to participate in religious mission trips or military service before starting college.

skilled content specialists. These small groups allow teachers to target specific areas for re-teaching in math and ELA as well as advanced science courses. Grade team leaders are able to determine proper placement of students every two weeks based on formative data reports available in IDEA's data system.

Culture of Academic Rigor: IDEA has contracted with the **National Math and Science Initiative** (NMSI- Appendix C) for intensive coaching and teacher support to further increase academic rigor. NMSI provides teacher support, curricular support, money for incentives, and program management with the goal of maximizing the number of students who pass Advanced Placement (AP) exams while strengthening AP participation. In NMSI program schools, the average increase in AP qualifying scores in English, math and science is 79% in the first year—11 times the national average for a single-year change in qualifying scores—and 137% after three years, almost six times the national three-year average increase of 24%. During a pilot initiative with 8th graders, 94% of IDEA Pharr AP Spanish students earned qualifying scores of 3 or higher. IDEA implements this initiative at all full-scale College Prep sites. This year, IDEA achieved phenomenal AP test results, passing more tests than ever before and tripling the number of juniors qualified to be AP Scholars.

In 2015, IDEA Prep San Benito and NMSI were featured on *Think It Up*, an hour-long telecast simultaneously broadcast on all four major networks, including ABC, CBS, Fox, and NBC. *Think It Up* is a new education initiative spearheaded by the Entertainment Industry Foundation, a leading charitable organization, and supported by ExxonMobil, among others. IDEA Public Schools was the only school network in Texas that was featured on the program. Earlier in 2016, IDEA was honored with a highly competitive CSP Non-State Educational Agencies Dissemination grant to share its AP for All success with others across the nation.

Strong Connection to College Experience: Three specific elements of IDEA’s program are focused on preparing students to matriculate to college:

- ***College counselor support***²⁹: Beginning in 6th grade, college counselors provide a college preparation course sequence to students on the value of going to college, how they need to plan ahead to be accepted to college, identifying top choice colleges, applying to college, and paying for college. The AVID³⁰ curriculum is implemented in high school. In addition to supporting strong writing and study skills, the AVID program has a four-year sequence of coursework that supports students through the college selection and application process.
- ***College experiences/field lessons:*** At the end of each school year, students in 6th through 11th grades visit colleges and universities across the United States. The purpose of the field lessons is to make the idea of college tangible for every student. Each student visits at least 20 colleges prior to graduation. Students will be exposed to college life first-hand, helping them make the best decision on the specific school they would like to attend.

²⁹ **Evidence of Promise:** College Counselors, counseling and college matriculation: Does the availability of counseling affect college-going decisions among highly qualified first-generation college-bound high school graduates? Found first-generation students with access to low student-counselor ratios have higher rates of attending four year universities. (*Randomized controlled trial*)

³⁰ **Evidence of Promise:** Schoolwide Impact and AVID| (Watt, Powell, Mendiola & Cossio)- Quasi experimental study found that AVID schools saw an improvement in advanced course enrollment, students graduating on advanced graduation plans, AP/IB testing, and high school graduation or completion rates. (*Quasi-experimental study*)

- ***Requirement for college acceptance before receiving a diploma:*** All IDEA students must be accepted into a college prior to receiving their high school diploma. This milestone is celebrated at College Signing Day for all seniors. During this event, seniors announce the college they have selected.

Robust College Matriculation and Support: Each student is supported through the process of applying to college and applying for financial aid. Parents are supported through the process as well, the vast majority whom have not attended college themselves. College counselors on each campus engage in individual problem solving in partnership with seniors to ensure that they are accepted into college and that they enroll and matriculate. Once in college, IDEA provides its former students with targeted support to ensure that they persist.

IDEA's Proven, Systematic School Launch Model

IDEA's School Launch Model includes launching a primary school and a secondary school on the same site, at the same time. Over time these schools grow into a cohesive Pre-K-12 system. Primary schools, called "Academies," enroll 842 students in grades Pre-K-5 when they are fully scaled. All existing and new IDEA Academies will offer Pre-K by 2018-19. Secondary schools, called "College Prep," enroll 748 students in grades 6-12 when they are fully scaled. While IDEA will assess opportunities that deviate from this standard model, IDEA anticipates launching the majority of expansion campuses with this well-defined, proven model.

New schools in Texas are launched with grades Pre-K - 1 (Academy) and 6 (College Prep) and then add a grade each year until they reach "full scale" of Pre-K - 5 and 6-12 enrollment. New schools in Southeast Louisiana will launch with grades K - 2 and 6. This is critical to the IDEA School Launch Model because it allows the principals on each campus to carefully create and support the IDEA culture within each class of IDEA students as they enroll. A new school

site (housing both an Academy and a College Prep campus) will reach full enrollment in year seven of operations when the first class of 6th graders enter 12th grade. IDEA's schools reach self-sustainability after year three of operations due to economies of scale afforded by increasing student enrollment year over year as a campus expands.

Impact Goals

IDEA's three core goals guiding replication and expansion of all our work include:

- 1) Achieve College-Ready Student Results; 2) Build a Strong and Sustainable Organization; and
- 3) Achieve the Mission at Scale.

IDEA's focus on getting students to and through college allows the organization to produce significantly more college graduates than traditional public school districts. By the end of the CSP funding period (2020-21), IDEA will have 8,202 alumni and will be graduating approximately 1,486 students in that year (and an increasing number every year thereafter) who will earn a college degree, the majority of whom will be low-income. By contrast, the Houston Independent School District (Texas' largest district) graduates approximately 1,500 students each year who will go on to earn a college degree within six years (The Houston Chronicle, Ericka Mellon).

Metrics

To achieve IDEA's theory of change (see Appendix H8), 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** for each measure will be tracked by the senior leadership team over the five-year project period; all tie to the goals of every professional in the organization:

GOAL 1: ACHIEVE COLLEGE-READY STUDENT RESULTS						
<i>Strategies: Replicate proven academic model; continuously gather and analyze quantitative data; provide individualized instruction and supports; provide AVID and ACT test preparation; all high school students take 11 AP courses; provide robust "to and through" college counseling and preparation activities</i>						
Objective Performance Measure	Baseline	2016-17	2017-18	2018-19	2019-20	2020-21
% 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 higher)	25	27	29	31	33	35
% of graduates who are accepted to a college or university	100	100	100	100	100	100
% of graduates who matriculate to a college or university	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
Will annually report on % of 4 th and 8 th grade charter schools students performing at or above the state level in mathematics and reading. Benchmark: 4 th - Math 79.9%, 78.1% Reading; 8 th - 91.4%, 90.6%						

GOAL 2: BUILD A STRONG AND SUSTAINABLE ORGANIZATION						
<i>Strategies: Provide well-articulated Teacher Career Pathway; recognize and reward teaching excellence; measure and monitor staff satisfaction; implement a proven, tested financial and operational model; Focus on attendance to drive academic results so students are in the classroom</i>						
Objective Performance Measure	Baseline	2016-17	2017-18	2018-19	2019-20	2020-21
% 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
Will report annually on the Federal cost/ student for school in operation 3+ years. Benchmark: \$1,460						

GOAL 3: ACHIEVE THE MISSION AT SCALE						
<i>Strategies: Replicate successes from prior expansion efforts and prior CSP grant awards. Use evaluation findings to iterate and improve from each launch. Place schools in neighborhoods that are mission-aligned.</i>						
Objective Performance Measure	Baseline	2016-17	2017-18	2018-19	2019-20	2020-21
Enrollment (increase by 43,243 students)	23,526	28,891	35,356	44,635	54,679	66,769
CSP-funded schools in operation (2 expansion/16 replication schools opened)	--	2 0	2 0	2 8	2 12	2 16
Total schools in operation	44	50	60	78	96	116
% of students with low socio-economic status	80	80	80	80	80	80

D. MANAGEMENT PLAN AND PERSONNEL

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. Specifically, IDEA’s HQ team supports all IDEA schools in five ways including: **A)** Providing new school start-up services including facilities financing, construction and preparation; **B)** Recruiting top talent for all school leadership, instructional, and operational roles; **C)** Providing ongoing academic, financial, and operational support via centralized professional development and curriculum; and **D)** Ensuring effective governance and oversight through a regional and national board structure. Please see Appendix H11 for an organizational chart showing HQ and Regional staffing structures.

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 (Appendix H16 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. The following table illustrates the key program activities, responsibilities, timelines, and milestones for this CSP project that will ensure fidelity to the IDEA school launch model, adherence to program budget, and the timely accomplishment of all program goals and objectives. **Items will repeat annually throughout the grant with the exception of items marked with an asterisk (*)** that are one-time activities. Following that is the timeline for data collection to measure progress toward project objectives

and outcomes. (Note: Timeline reflects the *grant project quarters*, ex: Q1 – Oct. – Dec., etc.)

Major Project Management Activities and Milestones	Position(s)	Timeline
Announce notice of CSP grant award to IDEA learning communities*; meet with stakeholders (esp. parents-See Appendix H12 for parent engagement plan) to review goals, objectives, activities, and budget as appropriate	Superintendent and Senior Leadership Team (SLT)	Q1
Identify/designate CSP Project Director* (PD)/qualitative data analyst to be responsible for compliance and reporting related to this initiative	Chief Program Officer and Sr. Dir of Research and Analysis (R&A)	Q1 each year
Hire one FTE for internal research analysis team* (project-related quantitative data gathering, analysis, evaluation, and reporting)	Sr. Dir. of R&A	Q1-Q2 each year
Conduct grant kick-off call to begin implementation planning with business office, Director of R&A, Sr. Leadership team (SLT) and Regional Executive Directors (San Antonio, El Paso, Southeast Louisiana)	PD and Development team Grant Manager	Q1 each year
MILESTONE: Project Staffing Complete		
Establish reporting procedures, timelines, and methods	PD and External Evaluator	Q1-Q2 each year
Update baseline demographics and other data	PD	Q1 each year

Major Project Management Activities and Milestones	Position(s)	Timeline
Consult with business and community partners to implement and actualize CSP expansion and replication	SLT; Regional Executive Directors	Q1-Q4 each year
Conduct data gathering for project evaluation	CFO, SLT, PD	Q2-Q4 each year
Meet with Principals in Residence participants to discuss CSP plan and targets for school leadership readiness	Supt, VP of Schools and PD	Ongoing
MILESTONE: Project Systems, Baselines, and Targets Established		
Purchase/receive/store/distribute/install supplies, materials, and equipment to support project implementation	PD, Analyst, Principals of new schools	Q1-Q4 each year
Complete annual interim financial and management reports; share with stakeholders via board meetings	PD, CFO	Q2, Q4 or as required each year
School leaders and teacher/instructional leaders apply to, are selected for, and attend training and development programs for the purpose of staffing new schools	Supt, Exec Directors	Q3 each year
Begin annual budget cycle with all schools and departments for upcoming school year	CFO and team	Q3 each year

Major Project Management Activities and Milestones	Position(s)	Timeline
Hire new teachers and staff for upcoming year	Principals	Q3-Q4 each year
Disseminate results of CSP project to US Dept. of Education, national and local stakeholders, education/business/community partners, and others	SLT, PD, Business Office	Q4 or as required each year
MILESTONE: Project Successfully Completed; 2 Expansion Schools, 16 Replication Schools Established; Project Objectives/Outcomes Achieved		

In addition to major project management activities as outlined above, the Project Director 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 for additional detail.

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 business plan for increasing, sustaining, and ensuring the quality and performance of charter schools beyond the initial period of Federal funding

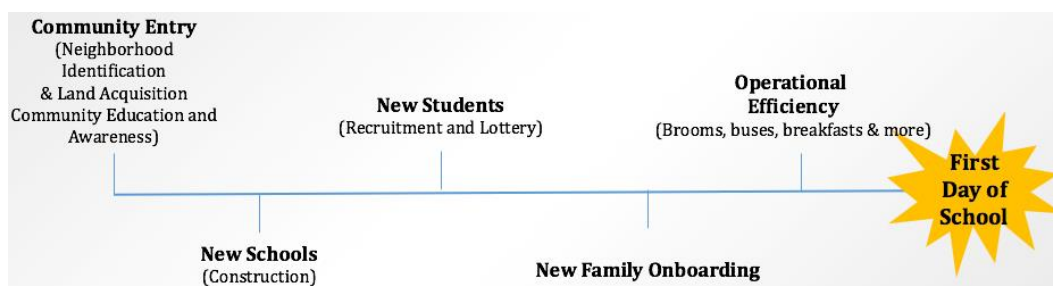
From its inception, IDEA has been very intentional about designing a relationship between

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. 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 effective governance and oversight. The org chart in Appendix H11 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. To meet its goals of scale (116 schools total by 2020) and quality (closing historic achievement gaps by increasing student achievement) the CMO provides schools with critical operational support during the start-up phase.

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 more than 24 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 H13 for new school start up tasks and tools.

With 44 schools currently in operation, IDEA has learned what things are necessary when launching 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. 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.

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, El Paso and Baton Rouge 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. The lease of facilities is also being considered in Baton Rouge.

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 H14 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.**

With support from a \$5M Investing in Innovation (i3) Development Grant from the USDE awarded to IDEA Public Schools in partnership with Pharr-San Juan-Alamo Independent School District (PSJA ISD), together with \$2M in privately raised matching funds, IDEA has been able to innovate and improve many key human capital tools and programs in the areas of Recruitment, Selection, Onboarding, and Staff Development.

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 staff satisfaction

even as IDEA's teaching force more than doubled.

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

School-based Leadership and Responsibilities

Principals: Each 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 COO oversees 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, the Rio Grande Valley and San Antonio regions have two SVPs. 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. To this end, the 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 H15 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. Please see Competitive Preference Priority 1b for an explanation of IDEA’s relationship with its charter authorizer in Louisiana.

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 has regional advisory boards for each region, currently Rio Grande Valley, Austin and San Antonio and will do so as well in the new regions of El Paso and has already begun building the Baton Rouge board. 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 local advisory boards assist with deeper community engagement, the development of local partnerships, and fundraising. A representative from each regional board sits on the governing board to advice on regional context.

(iii) 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 2014-15 FIRST rating (Financial Integrity Rating System of Texas) from TEA was "Passed," with a score of 24 (passing score was 16).

IDEA has a proven model that is effective and efficient. On average, each IDEA campus

Phase	School Type	Annual Gap	Annual Gap	Annual Gap for Schools of Each Type				
		Per TX School	Per LA School	Grant Year 1	Grant Year 2	Grant Year 3	Grant Year 4	Grant Year 5
Year 0	Secondary	-\$530,443	-\$1,591,329	\$0	-\$4,243,544	-\$2,121,772	-\$2,121,772	\$0
	Primary	-\$1,591,329	-\$530,443	\$0	-\$4,243,544	-\$2,121,772	-\$2,121,772	\$0
Year 1	Secondary	-\$68,289		\$0	\$0	-\$136,578	-\$68,289	-\$68,289
	Primary	-\$204,866		\$0	\$0	-\$409,733	-\$204,866	-\$204,866
Total				\$0	-\$8,487,088	-\$4,789,854	-\$4,516,699	-\$273,155

achieves public funding solvency in its third year after opening. In the new TX and LA regions,

due to lower overall costs, it will only take two. For details regarding the total funding gap and phase-in process, see the Budget Narrative.

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 grant awarded 2014, 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. In El Paso and in Baton Rouge, community leaders and organizations have already pledged significant amounts of local funding (see letters of support in Appendix C). Please also see Appendix G and H1 for a list of IDEA’s highlighted accolades and partnerships.

(iv) IDEA’s plan for turning around schools that do not meet high standards

IDEA proactively supports principals with several different types of coaching to ensure success as school leaders. Centralized guidance from VPs of Schools and Executive Directors, together with weekly data calls, check-ins, observations, and monthly trainings, all provide thought partnership and collegial assistance to new and experienced school leaders alike. An

example of the power of these safeguards to improve struggling schools came in 2009 when IDEA decided to alter its School Launch Model from grades K, 6, and 9 to grades K-2 and 6 only. After realizing the difficulties inherent in trying to build a rigorous, college preparatory environment in just three years IDEA leaders modified the launch model to allow College Prep campuses seven full years to establish, root, and grow their college-going culture.

It is not IDEA’s intention to close struggling schools but to remediate the conditions which caused them to underperform. Results across IDEA’s schools show that it has a model that works. When academics falter, it is because of the adults in the system that either need more support and coaching or are not a fit with the organization. Due to the weekly data conversations between managers and their employees, IDEA is able to quickly intervene before reaching a point where school closure is necessary.

Each IDEA school also carries out an extensive **Needs Assessment and Campus Improvement Plan** each spring, which is tailored to the unique circumstances of the campus, polished and refined with input and recommendations from the entire faculty, and used as a guide for budget allocations, program decisions, and managerial strategy. The finished plans are submitted to the Senior VP of Schools, who looks for trends and key areas of growth to target. At the district level, IDEA’s SLT meets weekly to systematically assess IDEA’s district wide and campus-specific needs, set rigorous goals, and measure progress. This information is tracked and becomes part of IDEA Public Schools’ **District Improvement Plan**.

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 15th best high school in Texas and 79th in the nation by the US News and World Report.** When the previously described process fails to improve the quality of the schools' performance, **IDEA will close the school.** This occurred in 2010 when IDEA closed the IDEA Pharr High School, removing the staff and moved the student body to another nearby IDEA high school.

(v) IDEA's highly qualified, experienced project team

IDEA will hire two full-time Data and Research Analysts—one qualitative and one quantitative—to join IDEA's data team and provide comprehensive internal evaluation support for this CSP initiative³¹. The qualitative Analyst will also serve as the **Project Director** and will receive support and assistance from IDEA staff who are directing and successfully managing the current 2014 CSP grant. This includes being informed and guided by the current CSP grant's

³¹ Having successfully managed two CSP grants as well as numerous other large federal education grant projects, IDEA is electing to build up its internal data analysis and evaluation capacity for this project while partnering with a third party evaluator to help ramp up internally.

third-party evaluator and the findings from both 2010 and 2014 CSP grant project implementations.

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 Senior Director of Research and Analysis. Job descriptions for the Data Analysts/Project Director positions are provided in Appendix B.

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

JoAnn Gama, IDEA Co-founder and Superintendent, is responsible for supporting 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.

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 special populations to campuses.

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.

Wyatt Truscheit, the Chief Financial Officer, oversees the business office. This office manages Finance and HR Administration, which are critical to the day-to-day function of the schools and 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.

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 172 schools by 2022.

In addition to these Senior Leadership Team members, this CSP project is supported by high-quality **Executive Directors** in each region. Please see the Appendix B for the Executive Director job description as well as for the resume of Kenneth Campbell, Executive Director for IDEA Southeast Louisiana and Rolando Posada, Executive Director for San Antonio.

E. EVALUATION PLAN

In the past six 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 of grant funds across five grants to partnerships with 3rd 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 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 the CSP 2014 award, 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 launch³². At the time of this application, the first year of the project evaluation is still underway; 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.

In order to continue to learn through growth in new markets, IDEA's Project Director/Qualitative Analyst and the Quantitative Research Analyst (to be hired) will partner with Copia Consulting LLC (sub-contractor to SRI 2014 study) to carry out formative research specifically related to IDEA's expansion. Copia will conduct an independent evaluation of IDEA's growth and expansion strategies funded by this Charter School Expansion grant. Founded in 2002, Copia has extensive experience working in the field of education, and many years of experience working with disadvantaged and multi-cultural student populations. The research and evaluation projects conducted by Copia include both federal and state grants such as Teacher Incentive Fund (TIF); Excellence in Educator Innovation (EEIP); GEAR UP; 21st Century; Carol M. White Physical Education Program; Race to the Top; Investing in Innovation (i3); and CSP Replication and Expansion. As a result, Copia is very familiar with the IDEA vision and mission, the educational model, the strengths and challenges of the organization and the ongoing initiatives to expand its efforts to effectively promote the educational success of underserved populations in the poorest regions of the country.

The evaluation will 1) describe the replication of the IDEA school model in new regions,

³² <http://credo.stanford.edu/pdfs/CGAR%20Growth%20Executive%20Summary.pdf>

specifically El Paso, Texas and Southeast (starting with Baton Rouge), Louisiana; 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 following research questions:

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?

Using baseline data from IDEA’s 2014 CSP Expansion grant evaluation, Copia will also compare the campus outcomes from campuses launched in 2016-17 through 2020-21 with those established in 2014-15 through 2018-19 to identify both increases and decreases as well as correlational factors such as region and changes in methodology, to the extent possible.

Research Design Overview

Copia 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. Brief 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 39) evolve in response to specific replication and expansion schools' needs. The study will also illuminate issues of scale as IDEA increases from 44 to 116 schools and during the grant period. Whenever possible, Copia will utilize data and interview information collected from the 2014 CSP grant so as not to be redundant and will focus evaluation on new developments.

One critical component of the Case Study will be a focus on IDEA's new initiative to establish increased internal quality controls by adding a new 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.

Copia will provide extensive professional development on research/quality control activities to the two CSP-funded Research Analysts. The professional development sessions will include topic areas such as developing observation tools and interview protocols; conducting interviews and focus groups; selecting appropriate quantitative methods for program evaluation; and analyzing qualitative/quantitative data and applying the results. Professional development sessions 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 two years of their 2014 Charter School Expansion grant evaluation to inform the professional development, and will continue to use those results for comparison purposes throughout the life of the grant.

Site Visits of Replication, Expansion, and Mature Schools. Copia will work closely with

IDEA’s internal evaluation team to conduct site visits to mature, expansion and replication schools in years 2-5, expanding the sample as new schools are established. 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. These activities will be led by IDEA’s internal team; Copia will provide oversight and consultation in addition to professional development, and will join site visits as necessary.

Teacher and Student Surveys. Copia will develop 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 evaluation team will analyze descriptive statistics of the survey scales and other applicable items by school maturity, elementary/secondary levels, and region.

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

Performance feedback and periodic assessment of progress towards outcomes. The evaluation team will provide formative feedback after completing site visits and surveys in years 2-5 to inform IDEA’s expansion strategies, as well as annual reports summarizing 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.

This will occur two times in Year 2 of the grant, and three times in years 3 - 5. Copia will report annually on implementation findings, descriptive statistics associated with the proposed measures and the impact analysis for the student and teacher cohorts. Each report will follow the guidance in *Reporting the Results of your Study* made available by the WWC. 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 teams 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 an internal quantitative research analyst and internal qualitative research analyst 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.