

Illinois State Charter School Commission

MODEL

Request for Charter School Proposals

Model RFP, Exhibits, and Guidance for Districts

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INTRODUCTION

The Illinois Charter School Commission (“the Commission” or “SCSC”) was established in 2011 as an independent body with statewide chartering jurisdiction and authority. The Commission is comprised of nine appointed members supported by a professional staff. Since its inception, the Commission has sought to be a respected authorizer and has based its policies and resources on national best practices.

The Commission is currently the authorizer of eight schools, five in Chicago, one in Grayslake, one in Richton Park, and one in Waukegan. In addition to actively monitoring its portfolio of schools, the Commission is responsible for developing model policies and resources for use by school districts across the state in order to support and improve professional practice in the Illinois charter school sector.

In Illinois, each school district has the authority to grant charters to schools, while the Commission may grant a charter on appeal only if the proposed or existing school is legally entitled to appeal AND if the proposed or existing school is in compliance with the charter schools law and is in the best interests of students it is designed to serve.

As such, Illinois school districts are responsible for deciding whether a proposed charter school should be permitted to open, enroll students, and receive public funding. Over the past twenty years, best practices have emerged to help guide school districts, states, and other authorizers in determining how to evaluate charter proposals and determine whether or not they should be approved. A high-quality RFP and evaluation process is the essential first step in ensuring that only charter schools that are likely to succeed – academically, financially, and organizationally – are authorized to operate and permitted to serve children.

This Model Charter School Request for Proposals (RFP) is designed to serve as a template for Illinois school districts in establishing and implementing their own new school application processes. Illinois school districts may elect to use the writing prompts provided in this model as a way to solicit comprehensive school proposals, or may adapt, supplement, or tailor the model RFP to best meet the needs of their students and district priorities. Similarly, charter school applicants in school districts that have not yet developed and/or provided an RFP may use the model RFP as an outline to structure their charter applications.

This document contains three main sections:

1. Developing a District RFP and Evaluation Process. This section provides guidance on launching and implementing an RFP and evaluation process, and on customizing the Model RFP.
2. Model RFP Components. This section provides the outline for a comprehensive District new school RFP, including a set of writing prompts designed to support applicants in presenting a comprehensive proposal for a new charter school.
3. Exhibits. This section includes examples of documents that districts may wish to use in their process.

DEVELOPING A DISTRICT RFP AND EVALUATION PROCESS

The Commission defines a high-quality RFP and evaluation process as including the following elements:

1. Issuing a formal, written request for new school proposals;
2. Defining the precise timeline for the proposal, evaluation, and decision making process;
3. Utilizing teams of subject-matter experts to evaluate the new school proposals;
4. Conducting an in-person interview to assess the capacity of the proposed school leadership;
5. Presenting a formal recommendation to approve or deny each proposal to the local school board; and
6. Evidence-based decision making which focuses on the analysis of the evaluation team and the evidence presented, and is not motivated by political or personal agendas.

Preparing a District RFP

A well-developed RFP generally includes a suite of documents including, at a minimum:

1. An introduction to the district, its priorities, and the RFP and Evaluation process;
2. The timeline for the process, including specific deadlines and milestones;
3. Specific guidelines on the acceptable format for a proposal, technical specifications for proposal submission, and a list of required attachments;
4. A list of questions or writing prompts to which all applicants must respond in order to demonstrate a comprehensive plan for the academic, operational, and financial plans for the school; and
5. The evaluation criteria which will be used to establish the standard for approval of the proposal.

This document is designed to support districts in customizing the above components. Districts may also want to consider including the following elements, which will support applicants in developing clearly presented content and submitting complete proposals which can be consistently evaluated:

1. A comprehensive checklist that establishes the basis for the district's acceptance of proposals (if an applicant fails to submit a complete proposal, the district will be unable to fully and fairly evaluate the proposal against the established criteria);
2. Template documents that applicants must use to submit specific elements of the proposal, for instance a proposal coversheet, budget workbook, board member questionnaire, curriculum selection table, etc.
3. Online document submission using a file sharing system or online proposal software platform.

The writing prompts in the RFP are the actual "requests," designed to outline the content that each applicant is required to provide in order for their proposal to be evaluated and considered by the authorizing district. Most high quality authorizers tend to divide this content into three main components: Educational Plan, Organizational Plan, and Financial Plan. This structure is useful to authorizers and applicants alike because it ensures a standard format for all proposals; provides for a cohesive, readable narrative; allows school design elements to be evaluated individually and as a coherent whole; and it aids the authorizer in ensuring that all necessary design elements and legal requirements have been addressed.

It is advisable to also request a brief Executive Summary: a concise yet comprehensive overview of the proposed school. Typically, this section requires applicants to articulate the following: mission and vision, rationale/demonstrated need for the school, the population to be served, enrollment projections. The Executive Summary is not generally evaluated against its own criteria, but rather introduces the proposal and helps to set the applicant's standard for internal alignment of the full proposal.

The Educational Plan is arguably the most important section of the entire proposal. This section details the academic and instructional program, describes what the school day will look and feel like for students and teachers, and provides evidence, such as research and performance data, to demonstrate that key elements of the plan have been successful elsewhere *and* will be successful with the specific student population to be served. The Educational Plan generally contains the curriculum and instructional design, performance goals and expectations, school calendar and schedule, graduation and promotion requirements, school culture, supplemental programming, special populations and at-risk students, student recruitment and enrollment, student discipline, community and parental engagement, and educational program capacity.

The next two sections, the Organizational Plan and Financial Plan request articulation of the operational and financial systems, structures, and capacity to launch and implement the proposed school model. The Organizational Plan describes the non-academic components of running a school, including the individuals and/or positions slated to administer the school. This section includes discussions of governance, leadership and management, staffing, professional development, and performance management. It also includes facilities plans, and a detailed start-up plan and timeline for the school.

The Financial Plan is focused on the financial projections and the actual implementation of the design. It includes detailed budget projections including a five year operating budget, startup/year zero budget, years zero and one cash flow plan, as well as a budget narrative, and narrative sections discussing financial management and internal controls, and fundraising/development plans.

Many authorizers also include addenda to the standard RFP, in order to ensure that applicants proposing unique models or specialized student populations are both given ample opportunity to articulate their model, and vetted thoroughly on the more nuanced aspects of their model.

Of course, as school districts potentially use all or parts of this Model RFP, districts are free to and may want to consider other types of addenda based on either the specific type of applications they intend to target or expect to receive.

MODEL RFP COMPONENTS

The following pages constitute the Commission’s Model RFP. Districts should modify and customize each section as needed.

1. Introduction
2. Process Timeline
3. Submission Guidelines
4. RFP Writing Prompts
5. Exhibits
 - a. Checklist of Attachments
 - b. Model Evaluation Criteria
 - c. Sample Templates

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Introduction

This section should provide:

- A brief description of the district, its mission, and its students
- The district’s purpose in this request for proposals
- Any district priorities that interested applicants should be aware of
- An overview of the evaluation process

Timeline

This timeline should be presented clearly. A table format can be helpful. It is also useful to briefly explain each step and clearly indicate which steps relate to/require action by applicants, district staff, evaluators, etc. This timeline can be shared in advance of the RFP release, and also shared more broadly, such as on the district website. This timeline includes steps such as a notice of intent to apply (generally a one to two page form) and completeness check which are designed to support the district in understanding the field of applicants and planning/allocating resources.

MILESTONE	DATE
RFP Release	Day 1
<i>The district will release the RFP, posting it online at [INSERT LINK TO WEB ADDRESS]</i>	
Information and Orientation Session for Prospective Applicants	Within 1-2 weeks of release
<i>The district will host a brief information session [INDICATE WEBINAR OR IN PERSON] to review basic information about the proposal submission and evaluation process, and answer questions about the RFP and process. It is strongly recommended that prospective applicants read the RFP in its entirety in advance of attending the webinar.</i>	
Notice of Intent to Apply Deadline	14-21 days after release
<i>All applicants must complete and submit the MANDATORY Notice of Intent form by 5pm in order to be eligible to submit a full proposal.</i>	
Proposal Submission Deadline	up to 8 weeks after release
<i>All proposals must be submitted in full by 5pm. Late or incomplete proposals will not be accepted.</i>	
Completeness Notifications	1-2 days after submission deadline
<i>The district will conduct a completeness check to ensure that each proposal contains all required narrative sections and attachments. Applicants will have 24 hours to remedy any identified omissions.</i>	
Completeness Remedy Deadline	1 full day after notifications
<i>Applicants must remedy any identified issues by 5pm in order for their proposal to be accepted for evaluation.</i>	
Final Completeness Determinations Announced	1-2 days after remedy deadline
<i>The district will notify applicants of the final determination based on a re-check of completeness.</i>	
Individual Evaluation Period	14-21 days after determinations
<i>Each evaluator will conduct a thorough and independent evaluation of each proposal against the published evaluation criteria.</i>	
Capacity Interviews	Week after evaluation period
<i>District staff and evaluators will conduct interviews of each applicant team. Teams will be notified of the date and time at least two weeks in advance. Times and dates will not be negotiable and therefore applicants are strongly advised to keep their schedules open for all key team members for the above dates.</i>	
Public Hearing(s)	One week after interviews
<i>A public hearing will be held from [insert times, ideally at least 30-60 minutes per application considered]. Applicant teams will have 5 minutes to summarize their proposed school before the public comment begins.</i>	
Applicant Notification of District Recommendation	Min. 24 hours before board meeting
<i>The district will notify each applicant team of the recommendation staff will make to the board.</i>	
Board Meeting	Within 75 days of remedy deadline
<i>The school board has the responsibility to decide whether to approve or deny each proposed school within 75 days of the final completeness determination.</i>	

REQUEST FOR PROPOSALS

Applicants should respond to each section below in full. Your proposal should precisely follow the outline of the RFP.

To the extent that a specific section does not apply to a proposed school (e.g. an elementary school will not propose high school graduation requirements), the proposal should state the reasons that the section is not applicable.

Applicants must use template documents where specified.

[INSERT SPECIFIC FORMATTING INSTRUCTIONS, PAGE LIMITS, ETC.]

SCHOOL OVERVIEW

The School Overview should provide a concise summary of the following:

- The proposed plan for the school;
- The geographic and population considerations of the school environment;
- The challenges particular to those considerations; and
- The applicant team's capacity to successfully open and operate a high quality school given the above considerations.

1. **Mission and Vision.** State the mission and vision of the proposed school. The mission is a statement of the fundamental purpose of the school, describing why it exists. The vision statement outlines how the school will operate and what it will achieve in the long term. The mission and vision statement provide the foundation for the entire proposal.

The mission and vision statements, taken together, should: identify the students and community to be served; illustrate what success will look like; and align with the purposes of the Illinois charter school law and the district's stated priorities for new schools (if applicable).

2. **Educational Need and Anticipated Student Body.** Describe the student population that will be served by the proposed school; students' anticipated educational needs; and non-academic challenges the school is likely to encounter. If applicable, explain rationale for any targeted student population, community, curricular design or need. Identify any enrollment priorities on which the program is based consistent with applicable restrictions on enrollment eligibility and selection.
3. **Education Plan/School Design.** Provide an overview of the education program of the proposed school, including major instructional methods and assessment strategies and non-negotiable aspects of the school model. Describe the evidence that demonstrates that the school model will be successful in improving academic achievement for the targeted student population. Summarize what the proposed school would do more effectively than the schools that are now serving the targeted population and how the school would achieve its goals.
4. **Community Engagement.** Describe the relationships established to generate community engagement and support for the proposed school; describe activities to date and that demonstrate how you have assessed need or demand for the school and/or how you have solicited support for the school.

5. Leadership and Governance. Complete the following table, adding rows as needed, to list all members of the school’s proposed leadership team and governing board, including their roles within the proposed school, as well as their current job title, and employer. Do not include individuals who will not have a role with the proposed school, such as consultants working only on the proposal.

FULL NAME	ROLE AT SCHOOL	CURRENT EMPLOYER	TITLE

As **Attachment 1**, provide a resume (including contact information and professional biography) for each individual listed.

6. Enrollment Summary. Complete the following table, removing any rows for grades the school will not serve. Include the school year information for each column.

Grade Level	Number of Students					
	Year 1 SY:	Year 2 SY:	Year 3 SY:	Year 4 SY:	Year 5 SY:	At Capacity SY:
K						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
TOTAL:						

Describe the rationale for the number of students and grade levels served in each year and the basis for the growth plan illustrated above.

EDUCATIONAL PLAN

PROGRAM OVERVIEW

Summarize the education program, including primary instructional methods and assessment strategies, and any non-negotiable elements of the school model. Briefly describe the evidence that promises success for this program with the anticipated student population.

CURRICULUM AND INSTRUCTIONAL DESIGN

Propose a framework for instructional design that both reflects the needs of the anticipated population and ensures all students will meet or exceed state standards.

1. Describe the basic learning environment (e.g. classroom-based, independent study), including class size and structure.
2. Provide an overview of the planned curriculum for each division to be served (elementary, middle, high school).
 - a. If products or programs have been identified for some or all subjects, summarize curricular choices such as textbooks selected for each subject and the rationale for each. Identify all products to be used for all proposed grade levels. Describe the evidence that these curricula will be appropriate and effective for the proposed students.
 - b. If the school will use an internally developed curriculum, provide as **Attachment 2**, a sample course scope and sequence for one subject for each division. This should identify course outcomes and demonstrate alignment with Illinois Learning Standards.
3. If the curriculum is not already fully developed or selected, provide, as **Attachment 3**, a plan and timeline demonstrating when, how, and by whom the curriculum will be developed between submission of the proposal and the opening of the school. Specify which individual(s) and/or position(s) will be responsible and when key stages will be completed.
4. Describe the primary instructional strategies that the school will expect teachers to use and why they are well-suited for the anticipated student population. Describe the methods and systems teachers will have for providing differentiated instruction to meet the needs of all students.

PUPIL PERFORMANCE STANDARDS

Responses to the following items must be consistent with state and district standards.

1. Describe the pupil performance standards for the school as a whole.
2. Provide, in **Attachment 4**, a complete set of the school's proposed learning standards for one grade for each division the school will serve. Address the skills and knowledge each student will be expected to attain by the end of that grade.
3. If you plan to adopt or develop additional academic standards beyond the state and district mandates, explain the types of standards (content areas, grade levels). Describe the adoption or development process that has taken place or will take place, including the rationale and purpose for these requirements.
4. Explain the policies and standards for promoting students from one grade to the next. Discuss how and when promotion and graduation criteria will be communicated to parents and students.
5. Provide, also in **Attachment 4**, the school's exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do.

HIGH SCHOOL GRADUATION REQUIREMENTS

Responses to the following items must be consistent with state and district standards.

1. Describe how the school will meet these requirements. Explain how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered.
2. If you plan to adopt or develop additional graduation standards beyond the state and district mandates, explain the types of standards (content areas, grade levels). Describe the adoption or development process that has taken place or will take place, including the rationale and purpose for these requirements.
3. Explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).
4. Explain what systems and structures the school will implement for students at-risk of dropping out and/or not meeting the proposed graduation requirements.

SCHOOL CALENDAR AND SCHEDULE

1. Discuss the annual academic schedule for the school. Explain how the calendar reflects the needs of the educational program, including total number of days/hours of instruction. In **Attachment 5**, provide the school's proposed calendar for the first year of operation.
2. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade. Provide, also in **Attachment 5**, a sample daily and weekly schedule for each division of the school.

SCHOOL CULTURE

1. Describe the culture or ethos of the proposed school. Explain the plans to promote a positive academic environment and reinforce student intellectual and social development.
2. Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for the enculturation of students who enter the school mid-year.
3. Explain how the school culture will take account of and serve students with special needs, including students receiving special education services, English Language Learners, and any students at-risk of academic failure.
4. Briefly describe a typical school day from the perspective of a student in a grade that will be served in your first year of operation.
5. Briefly describe a typical day for a teacher in a grade that will be served in your first year of operation.

SUPPLEMENTAL PROGRAMMING

1. If summer school will be offered, describe the program(s). Explain the schedule and length of the program including the number of hours and weeks. Discuss the anticipated participants including number of students and the methods used to identify them. What are the anticipated resource and staffing needs for these programs?
2. Describe the extra- or co-curricular activities or programming the school will offer; how often they will occur; and how they will be staffed and funded.

3. Describe the programs or strategies to address student mental, emotional, and social development and health.
4. If applicable, describe any other student-focused activities and programs that are integral to the educational and student-development plans.

SPECIAL STUDENT POPULATIONS

1. Describe the overall plan to serve students with special needs, including but not limited to: students with Individualized Education Programs or Section 504 plans; English Language Learners; students identified as intellectually gifted; and students at risk of academic failure or dropping out. Identify the special populations and at-risk groups that the school expects to serve, whether through data related to a specifically targeted school or neighborhood or more generalized analysis of the population to be served. Discuss how the course scope and sequence, daily schedule, staffing plans, and support strategies and resources will meet or be adjusted for the diverse needs of students.
2. Explain more specifically how you will identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible. Specify the programs, strategies, and supports you will provide, including the following:
 - a. Methods for identifying students with special education needs (and avoiding misidentification);
 - b. Specific instructional programs, practices, and strategies the school will employ to provide a continuum of services; ensure students' access to the general education curriculum; and ensure academic success for students with special education needs;
 - c. Plans for monitoring and evaluating the progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student's goals as set forth in the Individualized Education Program (IEP);
 - d. Plans for promoting graduation for students with special education needs (high school only); and
 - e. Plans to have qualified staffing adequate for the anticipated special needs population.
3. Explain how the school will meet the needs of English Language Learner (ELL) students, including the following:
 - a. Methods for identifying ELL students (and avoiding misidentification);
 - b. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students;
 - c. Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services;
 - d. Means for providing qualified staffing for ELL students.
4. Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports you will provide for these students.
5. Explain how the school will identify and meet the needs of intellectually gifted students, including the following:
 - a. Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities;
 - b. Plans for monitoring and evaluating the progress and success of intellectually gifted students; and
 - c. Means for providing qualified staffing for intellectually gifted students.

STUDENT RECRUITMENT AND ENROLLMENT

1. Explain the plan for student recruitment and marketing that will provide equal access to all interested students and families. Specifically describe the plan for outreach to families in poverty; academically low-achieving students; students with disabilities; and other youth at risk of academic failure.
2. Explain the proposed school's student recruitment and enrollment plans, including:
 - a. tentative dates for application period;
 - b. enrollment deadlines and procedures, including explanation of how the school will receive and process applications;
 - c. Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers; and
 - d. Explanation of the purpose of any pre-admission activities for students or parents.
3. Provide, **as Attachment 6**, a copy of the school's proposed application form.

STUDENT DISCIPLINE

1. Describe in detail the school's approach to student discipline, including:
 - a. Practices the school will use to promote discipline, including both penalties for infractions and incentives for positive behavior;
 - b. A list and definitions of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended or expelled;
 - c. An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings; and
 - d. Procedures for due process when a student is suspended or expelled as a result of a violation, including a description of the process that the school will employ for expulsion hearings and governing board decision-making and a plan for providing services to students who are expelled or out of school for more than ten days.
2. Explain how students and parents will be informed of the school's Discipline Policy.
3. If already developed, provide a copy of the school's discipline policy as **Attachment 7**.

PARENT AND COMMUNITY INVOLVEMENT

1. Describe the role to date of any parents and community members involved in developing the proposed school.
2. Describe the activities undertaken to date to assess and build parent and community support for your school. Explain how you will engage parents and community members from the time that the school is approved through opening.
3. Describe how you will engage parents in the life of the school. Explain the plan for building family-school partnerships that strengthen support for learning and encourage parental involvement. Describe any commitments or volunteer activities the school will seek from or offer to parents.
4. Discuss the community resources that will be available to students and parents. Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships including any fee-based or in-kind commitments from community organizations or individuals that will enrich student-learning opportunities. Include, **as Attachment 8**, existing evidence of support from intended community partners such as letters of intent/commitment, memoranda of understanding, and/or contracts.

EDUCATIONAL LEADERSHIP CAPACITY

1. Identify the key members of the proposed school leadership team. Identify *only* individuals who will play a substantial and ongoing role in school development, governance and/or management, and will thus share responsibility for the school's educational success. These may include current or proposed governing board members with educational experience (a full discussion of the proposed board is addressed below), proposed school staff, and any essential partners who will play an important ongoing role in educational program of the school's development and operation. Describe the team's individual and collective qualifications for implementing the school design successfully, including capacity in areas such as: school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent and community engagement.
2. Describe the group's ties to and knowledge of the target community.
3. Identify any organizations, agencies, or consultants that are partners in planning and establishing the school, along with a brief description of their current and planned role and any resources they have committed or plan to contribute to the school's development.
4. Identify the proposed school leader (principal) and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record. Provide specific evidence that demonstrates capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed, and provides evidence of the leader's track record in the classroom. Discuss the evidence of the proposed leader's ability to effectively serve the anticipated student population. Provide, **in Attachment 1**, the resume and professional biography for this individual.

OR

If no candidate has been identified, discuss the recruiting plan, selection process and criteria, and timeline for hiring the school leader, and provide **as Attachment 9** the job description for this role.

5. Describe the responsibilities and qualifications of the school's leadership/management team beyond the school leader. Identify the individuals who will fill these positions and provide. Discuss the evidence of their ability to effectively serve the anticipated student population, and provide evidence of their track record of leadership and classroom successes. Provide, **in Attachment 1**, the resumes and professional biographies for these individuals.

OR

If these positions are not yet filled, discuss the recruitment plan, selection process and criteria, and timeline for hiring these individuals, and instead provide **as Attachment 10** the job descriptions for each role.

6. Identify the individuals or team who will work on a full-time or nearly full-time basis to lead development of the school and (if applicable) the plan to compensate these individuals.

ORGANIZATIONAL PLAN

LEGAL STATUS AND ORGANIZATIONAL DOCUMENTS

1. Describe the proposed school's legal status, including non-profit status and federal tax-exempt status.
2. Submit, **as Attachment 11**, the Articles of Incorporation, proof of non-profit status and tax exempt status (or copies of your filings for each), the proposed bylaws of the governing board, and any other governing documents already developed, such as board policies.
3. Submit, **as Attachment 12**, organization charts that show the school governance, management, and staffing structure in: year one; year five and (if beyond the initial term of the proposed charter) at capacity. The organization charts should clearly delineate the roles, responsibilities, and lines of authority and reporting among the governing board, staff, any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the school. The organization charts should also document clear lines of authority and reporting within the school.

GOVERNING BOARD

1. Explain the governance philosophy that will guide the board, including the nature and extent of involvement by key stakeholder groups.
2. Describe the governance structure of the proposed school, including the primary roles of the governing board and how it will interact with the principal/head of school and any advisory bodies. Describe the size, current and desired composition, powers, and duties of the governing board.
3. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board.
4. Explain how this governance structure and composition will ensure that:
 - a. the school will be an educational and operational success;
 - b. the board will evaluate the success of the school and school leader; and
 - c. there will be active and effective representation of key stakeholders.
5. List all current and prospective board members and their intended roles. Summarize each member's interests in and qualifications for serving on the board. **In Attachment 1**, provide resumes and professional biographies for each board member.
6. If this application is being submitted by a pre-existing non-profit organization respond to the following.
 - a. If the non-profit's current board will govern the charter school, what steps have been taken to transform its board membership, mission, and bylaws to assume its new duties? Describe the plan and timeline for completing the transition and orienting the board to its new duties.
 - b. If a new board has been formed, describe what, if anything, its ongoing relationship to the existing non-profit's board will be. What, if anything, will the role of the existing non-profit and its board be in the life of the school?
7. Explain the procedure by which board members have been and will be selected. How often will the board meet? Discuss the plans for any committee structure.
8. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Provide, **as Attachment 13**, the board's proposed Code of Ethics and Conflict of Interest policy.
9. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

10. Describe plans for increasing the capacity of the governing board. How will the board expand and develop over time? How and on what timeline will new members be recruited and added, and how will vacancies be filled? What are the priorities for recruitment of additional board members? What kinds of orientation or training will new board members receive, and what kinds of ongoing development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.
11. If applicable, describe any advisory bodies or councils to be formed, including the roles and duties of that body. Describe the planned composition of the advisory body; the strategy for achieving that composition; the role of parents, students, and teachers (if applicable); and the reporting structure as it relates to the school’s governing body and leadership.
12. Explain the process that the school will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure, or practice at the school.

STAFF STRUCTURE

1. Complete the following table to demonstrate the complete staffing plan for the school. Delete rows for any positions not relevant to the proposed school, and add rows for additional positions. Change position titles as needed to align with the proposed school model. Specify the school year and the number of employees in each role in each year of operation.

SCHOOL STAFFING PLAN					
<i>Specify school year:</i>					
Principals					
Assistant Principals					
Additional School Leadership 1 [specify]					
Additional School Leadership 2 [specify]					
Additional School Leadership 3 [specify]					
Classroom Teachers (Core Subjects)					
Classroom Teachers (Specials)					
Student Support 1 [e.g., Social Worker]					
Student Support 2 [specify]					
Specialized School Staff 1 [specify]					
Specialized School Staff 2 [specify]					
Teacher Aides and Assistants					
School Operations Support Staff					
Total FTEs					

2. Provide the rationale for the staffing model and roll out presented above. Note the teacher-student ratio, as well as the ratio of total adults to students for the school.
3. Explain how the relationship between the school’s leadership team and the rest of the staff will be managed.

STAFFING PLANS, HIRING, MANAGEMENT, AND EVALUATION

1. Explain the relationship that will exist between the proposed charter school and its employees, including whether the employees will be at-will and whether the school will use employment contracts. If the school will use contracts, explain the nature and purpose of the contracts. If developed, provide, **as Attachment 14**, any personnel policies or an employee manual.

2. Outline the proposed school's salary ranges and employment benefits for all types and levels of employees, as well as any incentives or reward structures that may be part of the compensation system. Explain the school's strategy for attracting and retaining high-performing teachers.
3. Describe the strategy, plans, and timeline for recruiting and hiring the teaching staff. Explain other key selection criteria and any special considerations relevant to your school design.
4. Outline the school's procedures for hiring and dismissing school personnel, including conducting criminal background checks.
5. Explain how the school leader will be supported, developed, and evaluated each school year. Provide, **as Attachment 15**, any leadership evaluation tool(s) that you have developed already.
6. Explain how teachers will be supported, developed, and evaluated each school year. Provide, **as Attachment 16**, any teacher evaluation tool(s) that already exist for the school.
7. Explain how the school will handle unsatisfactory leadership or teacher performance, as well as leadership/teacher changes and turnover.

PROFESSIONAL DEVELOPMENT

1. Identify the person or position responsible for professional development.
2. Discuss the core components of the professional development plan for the proposed school and how these components will support effective implementation of the educational program. Discuss the extent to which professional development will be conducted internally or externally and will be individualized or uniform.
3. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.
4. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan. Include time scheduled for common planning or collaboration and how such time will typically be used.

PERFORMANCE MANAGEMENT

The district will evaluate the performance of every charter school annually and for renewal purposes according to a set of academic, financial, and organizational performance standards that will be incorporated into the charter agreement. The academic performance standards will consider status, growth, and comparative performance based on federal, state, and school-specific measures. The financial performance standards will be based on standard accounting and industry standards for sound financial operation. The organizational performance standards will be based primarily on compliance with legal obligations, including fulfillment of the governing board's fiduciary obligations related to sound governance.

1. Describe any mission-specific educational goals and targets that the school will have. State goals clearly in terms of the measures or assessments you plan to use.
2. Describe any mission-specific organizational goals and targets that the school will have. State goals clearly in terms of the measures or assessments you plan to use.
3. In addition to all mandatory assessments, identify the primary interim assessments the school will use to assess student learning needs and progress throughout the year. Explain how these interim assessments align with the school's curriculum, performance goals, and state standards.

4. Explain how the school will measure and evaluate academic progress – of individual students, student cohorts, and the school as a whole – throughout the school year, at the end of each academic year, and for the term of the charter contract. Explain how the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. Identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data.
5. Who will be responsible for managing the data, interpreting it for classroom teachers, and leading or coordinating professional development to improve student achievement?
6. Explain the training and support that school leadership and teachers will receive in analyzing, interpreting, and using performance data to improve student learning.
7. Describe the corrective actions the school will take if it falls short of student academic achievement expectations or goals at the school-wide, classroom, or individual student level. Explain what would trigger such corrective actions and who would be responsible for implementing them.

FACILITIES

1. Describe the basic facilities requirements for accommodating your school plan, including number of classrooms, square footage per classroom, common areas, overall square footage, and amenities. Include specialized student spaces such as labs, performance, and athletic program space. Describe the spaces needed for teacher and administrative work.
2. Describe the process for identifying and securing a facility, including plans for renovations, timelines, financing, etc. Identify any brokers or consultants you are employing to navigate the real estate market.
3. If you currently have a facility or an MOU or other proof of intent to secure a specific facility, provide proof of the commitment as **Attachment 17**. Briefly describe the facility including location, size, and amenities. You may also provide, in **Attachment 17**, up to 10 pages of supporting documents providing details about the facility. Charter school facilities must comply with applicable state, local and authorizer health and safety requirements. In addition, charter school applicants must be prepared to follow applicable city planning review procedures.

STARTUP AND ONGOING OPERATIONS

1. Provide, as **Attachment 18**, a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals.
2. If the school will provide transportation, describe the transportation arrangements for prospective students. In addition to daily transportation needs, describe how the school plans to meet transportation needs for field trips, athletic events, etc.
3. Provide the school plan for safety and security for students, the facility, and property. Explain the types of security personnel, technology, equipment, and policies that the school will employ.

ORGANIZATIONAL LEADERSHIP CAPACITY

1. Describe the applicant team's individual and collective qualifications for implementing the Organizational Plan successfully, including in areas such as staffing, professional development, performance management, general operations, and
2. Describe the team's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

FINANCIAL PLAN

BUDGET

1. Submit, as **Attachment 19**, a completed five year budget projection and year one cash flow projection. Prepare your budget using the template provided. Be sure to complete all the tabs in the workbook.
2. Submit, as **Attachment 20**, a detailed budget narrative that explains the budget. This narrative should present a detailed description of assumptions, revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising).
 - a. Give a detailed account of anticipated funding streams. Indicate the amount and sources of funds, property or other resources expected to be available through per-pupil revenue, banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated. Also include in **Attachment 20** evidence of commitment for any funds on which the school's core operation depends.
 - b. Provide a detailed contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated. Specifically address your year zero and year one cash flow contingency plans, in the event that revenue projections are not met in advance of opening.
 - c. Describe, in detail, the school's fundraising plan, and explain how it will support any private donations, philanthropic gifts, or grant revenue included in the budget. Identify the individuals responsible for this work, and provide key milestones for all identified private funding sources.

FINANCIAL MANAGEMENT

1. Describe the systems, policies and processes the school will use for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements.
2. Describe the roles, responsibilities, and authorities of the school's staff and governing board regarding school finances.
3. Describe how the school will ensure financial transparency to the district and the public, including its plans for public adoption of its budget and public dissemination of its annual audit and an annual financial report.
4. Describe any services to be contracted, such as business services, payroll, and auditing services, including the anticipated costs and criteria for selecting service providers.

FINANCIAL MANAGEMENT CAPACITY

1. Describe the leadership team's individual and collective qualifications for implementing the Financial Plan successfully, including capacity in areas such as financial management; fundraising and development, and accounting and internal controls.

EXHIBIT 1: Checklist of Attachments to a Complete Proposal

1. Resumes for all members of the school's proposed leadership team and governing board
2. Course scope and sequence (*If the school will use an internally developed curriculum ONLY*)
3. Curriculum development plan (*If the curriculum is NOT fully developed or all products have NOT been selected ONLY*)
4. Proposed learning standards
5. Proposed calendar, daily, and weekly schedules
6. Proposed application form
7. Proposed discipline policies
8. Evidence of support from community partner organizations
9. School leader job description
10. Leadership team job descriptions
11. Incorporation and governing documents
12. Organizational charts
13. Code of ethics and conflict of interest policy
14. Personnel policies or employee handbook
15. School leader evaluation tool(s)
16. Teacher evaluation tool(s)
17. Facilities documentation
18. Start-up plan
19. Completed financial plan workbook
20. Budget narrative

EXHIBIT 2: Model Evaluation Criteria

SAMPLE

EXHIBIT 3: Sample Template Documents

SAMPLE