

# Evaluation Form for the Tennessee Achievement School District 2015 RFP Neighborhood Model

*For questions, please contact:*

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**ACHIEVEMENT  
SCHOOL DISTRICT**



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**Evaluation Overview and Timeline**

The Evaluation Form is the essential tool for application evaluators, and will be completed individually by each evaluator. It contains criteria for each section of the proposal. The evaluators present both ratings on a scale and narrative analysis of each subsection of the application. Throughout the process, evaluators will update their Forms to include additional information (due diligence, capacity interview) as it is presented. Within each section and subsection, specific criteria define the expectations for a response that “Meets the Standard.” An applicant must “Meet the Standard” in all four main portions (Meeting the Need, Finance Plan, etc.) by the end of the evaluation process to be recommended for authorization. In general, the following definitions guide evaluator ratings:

Rating	Characteristics
<b>Meets the Standard</b>	The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant’s capacity to carry out the plan effectively.
<b>Partially Meets the Standard</b>	The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.
<b>Does Not Meet the Standard</b>	The response is undeveloped or incomplete; demonstrates lack of preparation; or otherwise raises substantial concerns about the viability of the plan or the applicant’s ability to carry it out.

In addition to meeting the criteria that are specific to that section, each part of the proposal should align with the overall mission, academic program, budget, and other sections of the application.

Date	Application Stage
<b>April 24</b>	Proposals due
<b>May 1-June 1</b>	Individual application analysis
<b>June 5</b>	Feedback provided to applicants
<b>Week of June 15</b>	Capacity Interviews (Location TBD)
<b>July 10</b>	Authorization notifications
<b>July 15</b>	Authorization announcement



## Instructions for Evaluators

1. Fill in your name, the name of the applicant group, and the name of the proposed school. Click once on the grey boxes to begin typing.
2. Complete the summary page LAST. Type a summary of your analysis of each section into the box provided, it will expand as needed. This should be a paragraph outlining the overall strengths or weaknesses of the application section as a whole. It should summarize your findings, and should not be simply cut and pasted from your subsection analysis.
3. For each subsection of the application, you should do the following during your initial individual analysis of the proposal:
  - a. Select a rating for that subsection. Click once on the gray box to select. If you are not able to check the box, please **HIGHLIGHT your selection.**
  - b. Use the “Strengths” area to identify notable positive aspects of the response. Be sure to include page references where applicable.
  - c. Use the “Concerns and Additional Questions” area to identify weaknesses and areas that should be explored during the debrief calls and/or capacity interview. Again, reference relevant page numbers.
4. Save the document (as a PDF) using this naming convention: ASD Eval\_School Name\_YOUR LAST NAME.pdf (For example, for the request for Rocketship Charter Schools by Margo, the file name would be: ASD Eval\_Rocketship\_ROEN.doc.) Upload your document to Box using the instructions provided.
5. Following the capacity interview you should do the following:
  - a. Select a final rating for that section. Click once on the gray box to select. If you are not able to check the box, please **HIGHLIGHT your selection.**
  - b. Use the “Interview Notes” area to present key information discovered or confirmed during the capacity interview. You are not required to type directly into the form during the interview, but may do so if you prefer.
  - c. Use the “Revised Analysis” area to provide your final evaluation of that subsection based on the complete application record (proposal, due diligence if applicable, capacity interview). This analysis should support the final rating you select.
  - d. Revise your summary page as needed.
6. Save the revised document (as a PDF) using this naming convention: ASD Eval FINAL\_School Name\_YOUR LAST NAME.pdf (For example, for the evaluation of Rocketship Charter Schools by Margo, the file name would be: ASD Eval FINAL\_Rocketship\_Roen.doc.) Upload your document to Box (link) using the “Individual Evaluation Form: Final” task.
7. Initial rubric feedback will be used to compile the preliminary recommendation report, which will be shared with operator applicants to prepare for capacity interviews. Only applicants who score better than “Does Not Meet the Standard” in three of the four areas on the evaluation rubric will proceed to the capacity interviews.

***Your comments and evidence are at least as significant as your rating. Please also remember that all documents, including your individual review, may at some time be available to the public.***



## Summary

*COMPLETE THIS PAGE LAST*

Evaluator Name:

Applicant Group:

Proposed School Name:

### SUMMARY COMMENTS

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section, and should not be simply cut and pasted from your subsection analysis.

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#### MEETING THE NEED

##### Initial Application Review

**Meets the Standard**
 **Partially Meets the Standard**
 **Does Not Meet the Standard**

COMMENTS:

##### After Capacity Interview

**Meets the Standard**
 **Partially Meets the Standard**
 **Does Not Meet the Standard**

COMMENTS:



**ACADEMIC PLAN**

Initial Application Review		
<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
COMMENTS:		
After Capacity Interview		
<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
COMMENTS:		

**OPERATIONS PLAN**

Initial Application Review		
<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
COMMENTS:		
After Capacity Interview		
<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
COMMENTS:		

**FINANCIAL PLAN**

Initial Application Review		
<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
COMMENTS:		
After Capacity Interview		
<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
COMMENTS:		



**Recommendations from the Evaluation Team are based on evaluation of the written application (narrative and attachments), independent due diligence (as applicable), and the applicant interview. In addition to meeting the criteria that are specific to that section, each part of the proposal MUST align with the overall mission, academic program, budget, and other sections of the application.**

**MEETING THE NEED**

**TARGETED PLAN**

A strong response will have the following characteristics:

- Responds to one of the needs identified in the Request for Proposals
- Clear and compelling rationale for the selected community
- Articulate explanation of how proposal meets district and community needs

**Initial Application Review**

<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
Strengths	Page	Concerns/Questions

**After Capacity Interview**

<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
Interview Notes	Revised Analysis	



**PARENT AND COMMUNITY INVOLVEMENT**

A strong response will have the following characteristics:

- Demonstrates involvement of parents, neighborhood, and/or community members in the development of the plan
- Outlines plan to effectively engage parents, community members, and other neighborhood partners from the time that the operator is approved (e.g., conducting home visits, community meetings, etc.)
- Incorporates a feedback loop to surface the priorities and concerns of parents and the broader school community
- Includes plan to incorporate parents into the life of the school, once open (e.g., parent advisory council, student placement, trainings, communications, volunteers, etc.)
- Includes plan to incorporate community into the life of the school (e.g., providing resources, programs, volunteers, etc.)

**Initial Application Review**

<input type="checkbox"/> Meets the Standard		<input type="checkbox"/> Partially Meets the Standard		<input type="checkbox"/> Does Not Meet the Standard	
<b>Strengths</b>		<b>Page</b>	<b>Concerns/Questions</b>		<b>Page</b>

**After Capacity Interview**

<input type="checkbox"/> Meets the Standard		<input type="checkbox"/> Partially Meets the Standard		<input type="checkbox"/> Does Not Meet the Standard	
<b>Interview Notes</b>			<b>Revised Analysis</b>		



**PHASE IN/FULL TRANSFORMATION PLANNING**

A strong response will have the following characteristics:

- Evidence (where available) of success in previous takeover or turnaround ventures, ideally with similar student populations
- Proactive process to engage students and transform existing school culture
- Outlines a plan which is aligned with the mission of the school and honors the traditions of the community it will serve
- Colocation plans which honors the history & tradition of the school both aesthetically and physically (where applicable)
- Colocation plans promote collaboration with shared school leadership team and reasonable plan for managing shared services and building elements (where applicable)

**Initial Application Review**

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<b>Strengths</b>		<b>Page</b>	<b>Concerns/Questions</b>		<b>Page</b>

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<b>Interview Notes</b>			<b>Revised Analysis</b>		





**ACADEMIC PLAN**

**MISSION AND VISION**

A strong response will have the following characteristics:

- The mission statement defines the purpose of the proposed charter school
- The mission is clear, concise, compelling, and measurable
- The vision provides a coherent description of what the school will look like when it is achieving its mission
- The vision is aligned to the mission and critical to the school's success
- The mission and vision are aligned to the mission of the Achievement School District to move schools performing in the bottom 5% in Tennessee to the top 25% in five years
- The mission encompasses the whole student (e.g., personal, social, emotional, intellectual, life skills, safety and security)

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**TRANSFORMATIONAL CHANGE**

A strong response will have the following characteristics:

- Educational strategy aligned to the mission and critical to the schools' success
- Alignment with the mission of the Achievement School District to move schools performing in the bottom 5% in Tennessee to the top 25% in five years
- Educational model designed to drive significant academic improvement for **all** students, in line with ASD's goal of double-digit gains annually
- Description of methodology for faithfully implementing the model across all school sites that is likely to result in replication of previous success
- Supported by research or evidence of success in the operator's schools or programs serving a similar target population

**Initial Application Review**

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**CURRICULUM & INSTRUCTIONAL DESIGN**

A strong response will have the following characteristics:

- Strategies well suited to the student population
- Instructional programs are rigorous
- Instructional programs offer a continuum of services to students through a tiered system of interventions, ensuring that all students are able to build the knowledge base necessary to access rigorous instruction
- Instructional programs identify and consider personal/social and other life skills for personalized planning, instructional delivery, and support services for all students, as well as utilization of student’s Individualized Learning Plans.
- Remediation for students in need of additional support
- Acceleration of gifted learners are built into the academic program
- Requirements for matriculation are clearly defined and plans to inform all stakeholders are clear

**Initial Application Review**

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<b>Strengths</b>		<b>Page</b>	<b>Concerns/Questions</b>		<b>Page</b>

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**HIGH SCHOOL GRADUATION REQUIREMENTS (Proposals Including Grades 9-12 Only)**

A strong response will have the following characteristics:

- School plans align with Tennessee Graduation Requirements and ensure college and career readiness
- Structures are in place to support students at risk of dropping out, including those who are overage for grade, those needing to access credit recovery options, and those performing significantly below grade level
- Exit standards for students are clearly defined and measurable, demonstrating high expectations for all students

**Initial Application Review**

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**After Capacity Interview**

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**DRIVING FOR RESULTS**

A strong response will have the following characteristics:

- Goals contribute to evaluation of mission attainment, framework for teaching and learning, program design evaluation
- Presents SMART goals: goals and objectives are specific, measurable, ambitious and attainable, relevant, and time bound
- Clear process for setting, monitoring and/or revising academic goals
- Academic goals set high standards for student learning and demonstrate alignment with [Tennessee Curriculum Standards](#)
- Assessment selections will provide sufficiently rich data for evaluation of the education program AND align with State Standards and the curriculum as presented
- Assessment plan is sufficiently detailed to demonstrate collection and analysis of individual student, student cohorts, school level, and network-level performance over time (interim, annual, year over year), including a clear process for setting and monitoring ambitious academic goals
- Demonstrates the validity and reliability of any non-standardized assessments, as well as how these assessments are aligned with the school design and high expectations
- Understanding of the obligation to participate in the statewide system of assessment and accountability
- Articulates process for utilizing data to support instruction and providing adequate training to teachers and school leaders
- Sound plan for measuring and reporting academic performance and progress of students for both individual schools and the network (*if applicable*)
- Explains how both individual schools and the network staff will use assessment data to drive key decisions aimed at improving academic outcomes (*if applicable*)

**Initial Application Review**

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**AT-RISK STUDENTS AND SPECIAL POPULATIONS**

A strong response will have the following characteristics:

- Clear process for identifying at-risk students, including those with academic and behavioral needs
- Provides clear and appropriate delineation within the RTI model
- Team/operator has a track record serving a wide range of students with disabilities (mild, moderate, and severe)
- Processes for identifying students with disabilities are well-defined, including administration of placement assessments and communications to parents and teachers
  
- Processes for identifying English Language Learners are well-defined, including administration of placement assessments and communications to parents and teachers
- Processes for identifying homeless students are well-defined, including administration of placement assessments and communications to parents and teachers
- Describes the specific services that will be provided for students within and outside the classroom, including curriculum and instruction and exposure to co-teaching
- Devotes adequate resources and staff to meeting the needs of all students
- Provides sufficient professional development to teachers and staff to ensure they can support and accelerate the learning of at-risk and special population students
- Demonstrates understanding of the laws and regulations governing services for students with disabilities
- Ensures that the rights of students with disabilities are protected with regard to discipline
- Articulates requirements and processes for monitoring services to students in need and plans to exit students who attain sufficient progress
- Outlines plans to promote parent participation among parents of students with disabilities and English Language Learners
- Plan to provide timely support for homeless students and families is sufficient and aligned with ASD policies

**Initial Application Review**

<input type="checkbox"/> <b>Meets the Standard</b>				<input type="checkbox"/> <b>Partially Meets the Standard</b>				<input type="checkbox"/> <b>Does Not Meet the Standard</b>			
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<b>Interview Notes</b>						<b>Revised Analysis</b>					



**SCHOOL STRUCTURE: CULTURE**

A strong response will have the following characteristics:

- Appropriate and effective strategies to support a school climate that will allow for fulfillment of educational goals
- Describes a concrete plan for norming social/cultural expectations at the start of each semester as well as for students who enter mid-semester
- Plan to establish a culture of high expectations with students/families and teachers/staff and promote positive behavior
- Well-defined goals around school culture and plans to monitor progress
- Research-based strategies to support students' social and emotional needs
- Age-appropriate strategies to support students' social and emotional needs

**Initial Application Review**

<input type="checkbox"/> Meets the Standard		<input type="checkbox"/> Partially Meets the Standard		<input type="checkbox"/> Does Not Meet the Standard	
<b>Strengths</b>		<b>Page</b>	<b>Concerns/Questions</b>		<b>Page</b>

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**SCHOOL STRUCTURE: STUDENT DISCIPLINE**

A strong response will have the following characteristics:

- Presents sound policies, shared in a student handbook, for student discipline, suspension, and expulsion including procedures for due process
- Presents sound policies, shared in a student handbook, for student attendance and truancy including procedures for due process
- Clear designation of staff responsible for implanting the discipline plan, including maintenance of student records and data
- A plan to ensure that vulnerable student populations are not disproportionately impacted by discipline policies
- Goals for student behavior are clear and measurable; there is a plan, and designated personnel, for monitoring and reporting related to behavior goals as well as ongoing maintenance of discipline records

**Initial Application Review**

<input type="checkbox"/> <b>Meets the Standard</b>		<input type="checkbox"/> <b>Partially Meets the Standard</b>		<input type="checkbox"/> <b>Does Not Meet the Standard</b>	
<b>Strengths</b>		<b>Page</b>	<b>Concerns/Questions</b>		<b>Page</b>

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<b>Interview Notes</b>			<b>Revised Analysis</b>		





**SCHOOL STRUCTURE: CALENDAR AND SCHEDULE**

A strong response will have the following characteristics:

- Calendar meets or exceeds the minimum of 180 days of instruction
- Calendar and schedule support implementation of the academic program
- Alignment between teacher and student schedules
- Outlines goals for student attendance and plans to monitor and adjust as needed

**Initial Application Review**

<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
<b>Strengths</b>	<b>Page</b>	<b>Concerns/Questions</b>

**After Capacity Interview**

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<b>Interview Notes</b>	<b>Revised Analysis</b>	



**A DAY IN THE LIFE & SCENARIOS**

A strong response will have the following characteristics:

- Scenarios aligned with the key priorities and principles shared in the Academic Plan and overall mission and vision for the school
- Understanding of enrollment processes, including those for students with disabilities
- Well-defined plan to support Ruby in accordance with her IEP and in support of the mission of the organization
- Ability to utilize data to drive decision making and rapid turnaround

**Initial Application Review**

<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
<b>Strengths</b>	<b>Page</b>	<b>Concerns/Questions</b>

**After Capacity Interview**

<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
<b>Interview Notes</b>	<b>Revised Analysis</b>	



**OPERATIONS PLAN**

**LEADERSHIP TEAM**

A strong response will have the following characteristics:

- Sensible organizational chart that clearly indicates all positions delineating board and management roles and lines of authority
  - Structure demonstrates effective assignment of management roles and responsibilities for instructional leadership, curriculum, personnel, budgeting, financial management, legal compliance, and any special staffing needs
  - Identifies qualifications and competencies of the lead person that align with the school’s mission and program and demonstrate capacity to successfully manage the school
  - Demonstrates that leaders meet necessary qualifications and competencies
  - If identified, school leadership team resumes demonstrate a range of experience including leadership at a high-performing school with management responsibilities, experience establishing a high-performing culture with students and staff, and responsibility for significant student achievement gains with target demographics
- Start-Up applicants:*
- *School leader must be identified by April 24th, 2015—Applicants who do not identify a school leader will be disqualified*
  - *If the identified school leadership team does not collectively demonstrate the experience required above, the applicant may be disqualified*
- Provides adequate coaching and support for school leadership

**Initial Application Review**

<input type="checkbox"/> Meets the Standard		<input type="checkbox"/> Partially Meets the Standard		<input type="checkbox"/> Does Not Meet the Standard	
<b>Strengths</b>		<b>Page</b>	<b>Concerns/Questions</b>		<b>Page</b>

**After Capacity Interview**

<input type="checkbox"/> Meets the Standard		<input type="checkbox"/> Partially Meets the Standard		<input type="checkbox"/> Does Not Meet the Standard	
<b>Interview Notes</b>			<b>Revised Analysis</b>		



**LEADERSHIP FOR EXPANSION (Experienced Operators Only)**

A strong response will have the following characteristics:

- Staff structure demonstrates effective assignment of management roles and responsibilities for instructional leadership, curriculum, personnel, budgeting, financial management, legal compliance, as well as any special staffing needs
- Network-level plan for sourcing and training potential school leaders, including qualifications and competencies aligned with the mission and programs
- Demonstrates that any identified school leaders meet the qualifications and competencies outlined
- If identified, regional leader candidate meets the qualifications and competencies outlined above and demonstrates experience as a leader both academically and organizationally
- If no regional leader candidate is identified, provides job description, including desired competencies, and timeline for selection
  - *Regional leader must be identified by June 15th for CMOs with fewer than 2 schools; please see RFP introduction to see complete eligibility requirements—APPLICANTS WITH FEWER THAN 2 SCHOOLS THAT DO NOT IDENTIFY A REGIONAL LEADER WILL BE DISQUALIFIED*

**Initial Application Review**

<input type="checkbox"/> Meets the Standard		<input type="checkbox"/> Partially Meets the Standard		<input type="checkbox"/> Does Not Meet the Standard	
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<b>Interview Notes</b>			<b>Revised Analysis</b>		



**STAFFING**

A strong response will have the following characteristics:

- Staffing aligned to the mission, vision, and academic program described
- Appropriately staffed to serve the intended student population
- Sound understanding of staffing needs necessary for the new-school(s) proposed
- Clear planning for network-wide staffing needs to accommodate growth *(of applicable)*

**Initial Application Review**

<input type="checkbox"/> Meets the Standard	<input type="checkbox"/> Partially Meets the Standard	<input type="checkbox"/> Does Not Meet the Standard
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**HUMAN RESOURCES**

A strong response will have the following characteristics:

- Articulates process for recruiting and hiring high quality teachers and leaders
- School staffing structure that ensures high-quality teacher support/development, student/family support, effective school operations, and compliance with all applicable policies and procedures
- School performance management system is likely to retain and promote talented staff, allows for re-structuring and removal of staff as needed, creates opportunities for leadership development, and sets clear expectations
- School performance management system is likely to identify unsatisfactory teacher or leader performance, provides opportunities for improvement, and clearly explains consequences for poor performance
- Essential functions and processes, including background checks, payroll, benefits, and employee relations, are accounted for

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**SCALE STRATEGY (Experienced Operators Only)**

A strong response will have the following characteristics:

- Adequately developed and staffed appropriately
- Previous scale-up endeavors have been thoughtful and successful (*if applicable*)
- Includes plan to infuse TN schools with the essential elements of the organization’s model
- Organization has sufficient infrastructure (or plan to develop same) to support the proposed network of schools, including shared services and the costs associated with them
- Clear, appropriate delineation of roles and responsibilities between the management organization and the school sites
- Sensible organization charts clearly indicate lines of authority between the board, network, and schools

**Initial Application Review**

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**SCALE STRATEGY (Experienced Operators Only)**

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**STUDENT RECRUITMENT AND ENROLLMENT**

A strong response will have the following characteristics:

**ALL MODELS:**

- The enrollment plan reflects an understanding of the ASD’s eligible enrollment groups
- The enrollment plan, including annual growth, is reasonable and supported by a clear rationale
- The enrollment plan addresses student attrition and backfilling
- The enrollment plan is aligned with the staffing plan and budget

**NEW START MODEL:**

- Articulates aggressive plan for recruiting eligible students to the school and describes specific actionable steps for ensuring the school is fully enrolled
- Includes outreach and recruitment strategies that demonstrates an understanding of the community likely to be served and is likely to allow the school to enroll sufficient numbers of students

**PHASE-IN OR FULL TRANSFORMATION MODEL:**

- Articulates comprehensive plan to reach out to zoned students and families, including communicating the school’s mission, vision, and model
- Presents strategy for engaging and investing the school community and families in the new school’s success
- Outreach strategies demonstrate understanding of the community likely to be served

**Initial Application Review**

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<b>Strengths</b>		<b>Page</b>	<b>Concerns/Questions</b>		<b>Page</b>

**After Capacity Interview**

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<b>Interview Notes</b>			<b>Revised Analysis</b>		



**BOARD GOVERNANCE**

A strong response will have the following characteristics:

- Strong understanding of the roles and responsibilities of a governing board of trustees that is aligned to the school’s mission
- Proposed governance structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and financials
- Clear delineation of authority and working relationship between the board and school staff
- Demonstrates that the board membership will contribute the wide range of relevant knowledge, skills, and commitment needed to oversee a successful charter school, including but not limited to educational, financial, legal, and community experience and expertise, as well as special skill set to reflect school-specific programs, if applicable (e.g., STEM, fine arts, blended learning, alternative programs, etc.)
- Provides plans for meaningful training for board members
- Describes the process for resolving student/parent objections and the mechanism for removal of board members if needed
- Goals are clear and measurable, and contribute to improved academic outcomes for students and overall advancement of the organization

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**INCUBATION YEAR DEVELOPMENT**

A strong response will have the following characteristics:

- Provides key planning year milestones for the planning year, as well as concrete actions and accountability, to ensure that the school is ready for a successful launch
- Describes leader development that includes training aligned with incubation year goals (may be either designed by or outsourced by the operator)
- Outlines the function of any employees in Year 0, as well as the funding source for associated compensation

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**SCHOOL MANAGEMENT CONTRACTS (If Applicable)**

A strong response will have the following characteristics:

- Clear rationale for selection of Education Service Provider (ESP)
- Demonstrates capacity and commitment of the governing board to oversee the ESP effectively:
  - Plan for board to monitor/evaluate the ESP's performance
  - Appropriate internal controls guide the relationship
  - Describes how the governing board will ensure fulfillment of performance expectations
- Discloses and addresses any potential conflicts of interest (real or perceived)
- Clearly defined contract terms including: contract duration; roles and responsibilities of the school governing board, school staff, and ESP; specific services and resources to be provided by the ESP; performance evaluation measures and mechanisms; compensation to be paid to the provider; financial controls and oversight; methods of contract oversight and enforcement; investment disclosure; and conditions for renewal and termination of the contract.
- Provides evidence of ESP's nonprofit status

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**SERVICES**

A strong response will have the following characteristics:

- Operations plan includes all essential and program-specific non-academic services, including, but not limited to:
  - Supporting transportation, food service, facilities management, nursing, and purchasing processes, and school safety
  - Staff structure/plan is adequate for the proposed school and aligns with the educational program; lines of authority are clear and appropriate
- IT plans should include consideration of:
  - User access control policies, limitation of access rights and procedures for removing access from departing employees
  - Policies for data stored on personal and portable devices aimed at minimizing inadvertent disclosing of information, such as theft or misplaced equipment
  - Strategy for information backups and disaster recovery
  - Intruder prevention strategies, including physical and electronic intrusion
  - Malware and malicious software prevention and removal strategy
- An effective plan for managing student information, including the Student Information System (SIS) to be used and a rationale for its selection.
- Alignment of services and staff with budget and academic program
- Metrics and process for evaluating effectiveness of services

**Initial Application Review**

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**FACILITIES**

A strong response will have the following characteristics:

ASD FACILITIES (Phase-in or Full Transformation Model)

- Clearly delineates non-negotiable building requirements
- Appropriate contingency plans if matched building(s) is not ideal (does not meet all stated needs/wants)
- Facility description(s) aligns with the educational model

INDEPENDENT FACILITIES (New Start Model)

- Identifies a viable educational facility or facilities that meets the needs of the students and accommodates the programmatic and operational needs of the school(s) over the charter term as described throughout the application—OR—discusses in detail the plan and timeline to identify and secure facilities as needed
- Demonstrates knowledge of facilities costs including, as applicable, cost of purchasing, leasing, building, or renovating an educational facility that conforms to applicable health, safety, and occupancy requirements

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**ONGOING OPERATIONS**

A strong response will have the following characteristics:

- Safety and security plans likely to ensure a safe environment for people and property
- Lists adequate insurance coverage, as required

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**FINANCIAL PLAN**

**FINANCIAL PLAN**

The ASD requires operators to demonstrate budgeting and financial management as well as fiscal responsibility and transparency at each the school and network level (*if applicable*). Therefore, a strong response will have the following characteristics:

- Budget priorities are aligned with school and expansion plan (*if applicable*)
- School level budget priorities are consistent with the operator’s model, including but not limited to: educational program, staffing, and facility
- Both school and network level budgets present balanced, realistic, evidence-based revenue and expenditure assumptions (including, if applicable, any plan to incur and repay allowable debt)
- Sufficient detail and specificity of assumptions for ALL budget line items to allow for the assessment of fiscal viability
- Commitment to maintaining the financial viability of each school individually and the network as a whole (*if applicable*)
- Clear understanding of monthly cash flow for both individual school sites and the network/region as a whole (*if applicable*)
- Demonstrates sufficient financial health of the network through audited financial documents (*if applicable*)
- Current ratio of at least 1.1 on a monthly basis for network (if applicable) and school
- Sufficient cash reserves to cover operations for EACH school and for network or regional operations (if applicable), required minimum of 30-days

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