**[INSERT APPLICANT NAME]**

**2018-19 Local Campus Partner Application**

**Evaluation Form**

**Ratings and Criteria Overview**

Evaluators will use the following criteria to rate applicant responses to the Request for Applications. Within each section, specific criteria define the expectations for a strong response that “Meets the Standard.” Evaluators will rate responses by applying the following guidance:

|  |  |
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| **Rating** | **Characteristics** |
| **Meets the Standard** | 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. |
| **Partially Meets the Standard** | The response meets the criteria in some respects but lacks detail and/or requires additional information in one or more areas. |
| **Does Not Meet the Standard** | The response is wholly undeveloped or significantly incomplete; demonstrates lack of preparation; is unsuited to the mission of the authorizer or otherwise raises substantial concerns about the viability of the plan or the applicant’s ability to carry it out. |

Recommendations from the Review Committee will be based on evaluation of the written application (narrative and attachments), independent due diligence, and the applicant interview (if applicable). **In addition to meeting the criteria that are specific to that section, each part of the proposal should align with the overall mission and vision, educational program, and operations and financial plans.**

**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 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:
   1. Select a 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.
   2. Use the “Comments” area to identify notable positive aspects of the response. Be sure to include page references where applicable. Also use this area to identify weaknesses and areas that should be explored during the debrief calls and/or capacity interview. Again, reference relevant page numbers.
4. If you are conducting capacity interviews (optional but recommended) you should do the following:
   1. 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.
   2. Use the “After Capacity Interview” 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.
   3. Revise your summary page as needed.

**Please note that your comments and evidence are as significant as your rating.**

**COMPLETE THIS PAGE LAST.**

**Ratings Summary**

Evaluator Name: Click or tap here to enter text.

Applicant Group: Click or tap here to enter text.

Proposed School Name: Click or tap here to enter text.

**SUMMARY COMMENTS**

Each part of your summary comments should provide a clear understanding of your overall impression 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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| **SECTION 2** — **Educational Program Design** | | |
| **Initial Application Review** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |
| **After Capacity Interview** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |

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| **SECTION 3** — **Governance, Operations Plan, and Capacity** | | |
| **Initial Application Review** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |
| **After Capacity Interview** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |

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| **SECTION 4** — **Financial Plan** | | |
| **Initial Application Review** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |
| **After Capacity Interview** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |

**Section 1 — School Overview**

*This section is not rated separately by the evaluators. It provides the evaluators with a reference for each of the other sections of the application, which will be assessed, in part, for the quality of alignment with the School Overview.*

**Section 2 — Educational Program Design**

*A strong Educational Program is coherent overall and aligned internally with the school’s mission and vision, Operations Plan, and Financial Plan.*

## Curriculum and Instructional Design

## *Effective Schools Framework Prioritized Lever 4 (High-Quality Curriculum) and 5 (Effective Instruction)*

1. A strong response will provide evidence of the following:
   1. A framework for a rigorous, quality instructional design that reflects the needs of the school’s target population and will ensure all students meet or exceed the expectations of Texas state standards;
   2. Sound instructional strategies that incorporate rigorous, high-quality experiences that promote critical-thinking skills and an explanation of why they are well-suited for the targeted student population;
   3. Effective methods and systems for providing differentiated instruction to meet the needs of all students and plans to utilize an RTI model to identify and serve students with learning gaps;
   4. A plan to maximize instructional time through consistent, efficient, and visible structures; and
   5. A sound base for the proposed educational program in research, theory, and/or experience, including that it is likely to be rigorous, engaging, and effective for the anticipated student population.

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| **Initial Application Review** | | |
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| **After Capacity Interview** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |

**High School Graduation Requirements *(High Schools Only)***

1. A strong response will provide evidence of the following:
   1. As **Attachment 1**, exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do and ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce); and
   2. Systems and structures the school will implement for students at risk of dropping out or not meeting exit standards.

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| **Initial Application Review** | | |
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| **After Capacity Interview** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |

**Special Populations and At-Risk Students**

1. A strong response will provide evidence of the following:
2. Demonstrated understanding of – and capacity to fulfill – state and federal obligations and requirements pertaining to students with disabilities, students identified as intellectually gifted, and ELLs, including appropriate discipline procedures for students with disabilities.
3. A sound explanation of evidence from which the projection of anticipated special populations was derived;
4. A comprehensive and compelling plan for appropriate identification of students with special needs and to ensure they are served in the least-restrictive environment possible, have appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities in ways that support their development, receive required and appropriate support services as outlined in their IEPs and 504 plans, and participate in standardized testing;
5. A comprehensive and compelling plan for providing services to ELLs, including methods for appropriate identification of ELLs, specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the general education curriculum and core academic program for these students, plans for monitoring and evaluating student progress and success of ELLs and for exiting them from services, and plan for including ELLs in standardized testing and schoolwide educational, extra-curricular, and culture-building activities;
6. A comprehensive and compelling plan for providing services to students identified as intellectually gifted, including methods for appropriate identification of students, specific instructional programs, practices, and strategies the school will employ; and
7. Demonstrated understanding of – and capacity to fulfill – state and federal obligations and requirements pertaining to students with disabilities, ELLs, and students identified as intellectually gifted.

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| **After Capacity Interview** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |

**Student Recruitment and Enrollment**

1. A strong response will provide evidence of the following:
   1. A sound and thoughtful student recruitment and marketing plan and timeline that will provide equal access to all interested students and families, including those in poverty, academically low-achieving students, students with disabilities, and other youth at risk of academic failure; and
   2. As **Attachment 2**, an Enrollment Policy that complies with state law and that ensures the school will be open to all eligible students.

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| **Initial Application Review** | | |
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| **After Capacity Interview** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |

## School Culture and Discipline

## *Effective Schools Framework Prioritized Lever 3 (Positive School Culture)*

1. A strong response will provide evidence of the following:
   1. A vision for school culture or ethos that will promote high expectations, a positive academic environment, and shared ownership of intellectual and social development for all students, including those with special needs, ELLs, and students at risk of academic failure;
   2. A coherent plan for establishing and maintaining the intended culture for students, teachers, administrators, and parents from the first day of school and throughout the school year and proposed mechanisms for monitoring campus climate;
   3. A clear plan to create an inclusive and welcoming environment that will engage families in positive, constructive, and personalized ways that meaningfully contribute to the school culture;
   4. A system of proactive and responsive student support services (e.g., counseling, mentoring, external service referrals) to meet student needs;
   5. As **Attachment 3**, a student discipline policy that provides for appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture while respecting student rights;
   6. Legally sound policies for student discipline, suspension, and expulsion that do not indicate students will be removed in an inappropriate manner, as well as appeals, including proper processes for students with disabilities; and
   7. Systems and processes for tracking discipline referrals and interventions to identify trends and adapt activities accordingly.

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**Assessment and Evaluation**

***Effective Schools Framework Prioritized Lever 4 (High-Quality Curriculum)***

1. A strong response will provide evidence of the following:
   1. Annual student performance goals that include targets aligned with the state accountability system;
   2. An effective plan (including qualified personnel) and system to implement and interpret interim assessments that will measure academic progress – of individual students, student cohorts – throughout the school year, and strategies to employ corrective actions when needed;
   3. A comprehensive, effective plan (including qualified personnel) and system for collecting and analyzing student academic achievement data, using the data to refine and improve instruction – including providing training and support to school leadership and teachers – and reporting the data to the school community. This should include identification of the student data system to be used, as well as qualified personnel who will be responsible for managing and interpreting the data for teachers and leading or coordinating data-driven professional development; and
   4. Thoughtful, appropriate corrective actions that the school and network will take if either falls short of the goals at any level, including explanation of what would trigger such actions and who would implement them.

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**Section 3 — Governance, Operations Plan, and Capacity**

*A strong Operations Plan is coherent overall and aligned internally with the school’s mission and vision, Educational Program, and Financial Plan.*

**Organizational Structure**

1. A strong response will provide evidence of the following:
   1. As **Attachment 4**, an organizational chart that clearly indicates all positions and delineates appropriate lines of authority; and
   2. The proposed school’s legal status (e.g., non-profit and federal tax exempt) and structure that are in compliance with state law.

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| **After Capacity Interview** | | |
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**Governing Board**

1. A strong response will provide evidence of the following:
   1. The independence of the board as it relates to the authorizer;
   2. Clear, appropriate plans for the board(s) to evaluate the success of the school(s) and school leader(s), including planned frequency of meetings and standing committees;
   3. As **Attachment 5**, appropriate bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances that will minimize real or perceived conflicts;
   4. As **Attachment 6**, a Board Member Information Sheet, resume, and proof of U.S. citizenship for each proposed Board Member to demonstrate that the proposed governing board members will contribute the wide range of knowledge, skills, and commitment needed to oversee a successful charter school, including educational, financial, legal, and community experience and expertise;
   5. A sound plan and timeline for board recruitment, expansion, orientation of new members, and ongoing training for members. Plan should include a thoughtful identification of desired experience and qualifications; and
   6. Sufficient capacity within and/or an appropriate relationship to any pre-existing non-profit board.

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## Application Team Capacity

## *Effective Schools Framework Prioritized Lever 1 (Strong School Leadership and Planning)*

1. A strong response will provide evidence of the following:
2. As **Attachment 7**, the collective qualifications (documented by résumés and bios for all members) to implement the school design successfully, including capacities in areas such as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent and community engagement; and
3. As **Attachment 8**, the proposed School Leader’s experience in/ability to design, launch, and lead a school that effectively serves the target population, as well as evidence that the proposed leader is well-qualified to implement the specific educational program being proposed. Any identified leadership training is appropriate for and aligned with the educational program *(if the School Leader candidate(s) is identified)*; or
4. As **Attachment 8**, the board and/or network’s preparation and plan to recruit and retain a leader with the ability to lead a school that effectively serves the target population *(If School Leader candidate(s) is not yet identified)*; and
5. Describe the plan to structure the work of the school leaders in the first year of operation and beyond, including how performance expectations will be clear, written, measurable, and aligned to the mission of the school.

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## Staffing Plans, Hiring, Management, and Evaluation

## *Effective Schools Framework Prioritized Lever 2 (Effective, Well-Supported Teachers)*

1. Provide evidence of the following:
2. A recruitment and hiring strategy, including selection criteria, protocol, and timeline, that are likely to result in a strong staff that is well-suited to the school;
3. A plan for providing targeted and personalized support and development to retain a high-performing staff;
4. Identification of evaluation tools and processes that will capture trends and track and promote teacher progress over time; and
5. Effective planning for unsatisfactory leadership/teacher performance and turnover.

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**Professional Development**

1. A strong response will provide evidence of the following:
   1. Sensible allocation of responsibilities for professional development, including demonstrated understanding of, and preparation for, professional development needs; and
   2. Professional development methods, calendar, and staffing that effectively support the education program and are likely to maximize success in improving student achievement, including an induction program that will prepare teachers to deliver any unique or particularly challenging aspects of the educational program.

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**Facilities**

1. A strong response will provide evidence of the following:
   1. Identification of an appropriate proposed school facility; or
   2. A sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility that will meet the requirements of the educational program and anticipated student population.

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| **After Capacity Interview** | | |
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**Section 4 — Financial Plan**

A strong Financial Plan is coherent overall and aligned internally with the school’s mission and vision, Educational Program, and Organization Plan.

**Financial Plan**

1. A strong response will provide evidence of the following:
   1. Reasonable assurances that the partner will have sound systems, policies, and processes for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls, ensure compliance with all financial reporting requirements, and conduct independent annual financial and administrative audits;
   2. That the school’s leadership has a strong understanding of the appropriate delineation of roles and responsibilities among the administration and governing board regarding school finance;
   3. That the school will ensure financial transparency, including plans for public adoption of the school’s budget and public dissemination of its annual audit and an annual report;
2. As **Attachment 9**, a complete, realistic, and viable operating budget within the Financial Plan Workbook provided;
   1. As **Attachment 10**, a detailed budget narrative that clearly explains reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions, including identifying the amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable); and
   2. Sound contingency planning to meet financial needs if anticipated revenues are not received or are lower than estimated.

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# 2018-19 Local Campus Partner Application

# Existing Partner/Experienced Partner Supplement

# Evaluation Form

# 

# Existing Partner/Experienced Partner Supplement

# (Limit: 5 Pages)

## Targeted Plan

1. A strong response will provide evidence of the following:
2. As **Supplemental** **Attachment** **1**, the experienced partner applicant or ESP’s success in serving populations similar to the population that the applicant intends to serve, including evidence of academic success and successful management of non-academic school functions (e.g., back- office services, school operations, extracurricular programs);
3. As **Supplemental** **Attachment 2**, the financial health of the experienced partner applicant or ESP as demonstrated through an independent financial audit report and its most recent annual report; and
4. A clear description of any history of charter revocations, non-renewals, withdrawals, or failures to open for the experienced partner applicant or ESP.

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| **After Capacity Interview** | | |
| Meets the Standard | Partially Meets the Standard | Does Not Meet the Standard |
| COMMENTS: Click or tap here to enter text. | | |

## ESP Management Plan and Legal Relationship

1. A strong response will provide evidence of the following:
2. As **Supplemental** **Attachment 13**, a clear and appropriate Management Agreement that includes:
   * A detailed description of the roles and responsibilities of the ESP;
   * A detailed explanation of the scope of services and costs of all resources to be provided by the ESP;
   * A detailed description of the oversight and evaluation methods that the board will use to oversee the ESP, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP’s progress toward achieving agreed-upon goals;
   * A detailed explanation of the conditions, standards, and procedures for board intervention if the management organization’s performance is deemed unsatisfactory;
   * A detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP and the schedule on which the ESP will receive compensation;
   * A detailed explanation of the financial responsibilities of the ESP, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP can make without obtaining board approval, and what reports ESP submit to the board on financial performance and on what schedule;
   * A detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed;
   * A detailed description of the grounds for which the ESP or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause;
   * An explanation and justification of any indemnification provisions in the event of default or breach by either party;
3. A compelling plan for the operation of the school in the case that the management agreement is terminated;
4. That the board is independent from the ESP and self-governing, including separate legal representation of each and arm’s-length negotiating and no existing or potential conflicts of interest between the school’s governing board and proposed ESP or any affiliated business entities;
5. A clear and detailed explanation of the supervisory responsibilities of the ESP (if any), including which school employees the ESP will supervise, how the ESP will supervise these employees, and how the charter school board will oversee the ESP supervisory responsibilities;
6. A detailed explanation and compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP, including evidence that such agreements are separately documented and not part of or incorporated in the ESP agreement. Such agreements must be consistent with the school’s authority to terminate the ESP agreement and continue operation of the school; and
7. A detailed explanation and compelling justification of any loans, grants, or investments made between the ESP and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused by the school.

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