



**Midland ISD**

**2020-2021 Local Campus Partner  
Application**

## Introduction

TEC Chapter 12 establishes charter schools for the following purposes:

- Improve student learning;
- Increase the choice of learning opportunities within the public-school system;
- Create professional opportunities that will attract new teachers to the public-school system;
- Establish a new form of accountability for public schools; and
- Encourage different and innovative learning methods.

## Charter Application Eligibility

The Board shall consider an application for a Campus charter or Program charter if the applicant:

- Meets the eligibility requirements for a Campus charter or Program charter set forth in TEC §12.052, §12.0521, §12.0522, and §12.053;
- Follows the application process established by the District; and
- Provides evidence to the Board that the applicant will comply with the statutory and District requirements for a campus charter or program charter.

The Board welcomes applications for a Campus charter or Program charter (“Subchapter C charter”) pursuant to various paths as set forth in TEC Chapter 39, Subchapter C. The Board specifically invites and encourages applications pursuant to TEC §12.0521.

Regardless of authorization path, all groups and entities seeking to create a Subchapter C charter shall follow the Charter Application and Review Process set forth in this document.

## Charter Application Process Overview

The application process shall include:

1. A comprehensive written application submitted by each applicant in accordance with application guidance and requirements provided by the Board;
2. A rigorous review of the written application conducted by a review committee (“Review Committee”) of at least three members, including at least one district staff member and one external evaluator, with relevant and diverse expertise;
3. A formal recommendation from the Review Committee to the Superintendent for approval or denial of each application, based on evidence from the Review Committee’s evaluation of the application; and
4. A formal recommendation from the Superintendent to the Board for approval or denial of each application, based on evidence from the Review Committee’s evaluation of the application; and
5. A formal vote by the Board to approve or deny each application.

**Standard of Review.** The Review Committee shall conduct a rigorous, evidence-based, and merit-focused evaluation of applications, including evaluating the proposed partner’s capacity to meet the Board’s established academic, financial, operational, and governance standards for

charter schools. The Board shall grant a charter only in cases in which the Board determines that the proposed school is likely to:

1. Succeed in meeting academic, financial, operational, and governance standards, thereby meeting both performance and legal compliance expectations for campus charters in the District;
2. Serve the best interests of the targeted students and community; and
3. Fulfill the purposes and intent of Texas's charter school law.

## 2020-21 Request for Applications Timeline

Milestones
<b>Application</b>
<p><b>Deadline for Complete Proposals — September 17, 2020</b></p> <p>All proposals must be submitted in complete and final form by this date. Incomplete proposals, including those that are only partially uploaded, will be disqualified from this cycle.</p>
<b>Independent Evaluation Team Review</b>
<p><b>Review Committee Proposal Review — September 17-20, 2020</b></p> <p>The Review Committee will review each proposal.</p>
<p><b>Optional Capacity Interviews — September 30-November 20, 2020</b></p> <p>Capacity interviews are conducted at the discretion of the District. They are optional but recommended. They are not open to the public.</p>
<p><b>Formal Recommendation from Superintendent to Board — February 16, 2021 or March 22, 2021</b></p>
<p><b>Board Vote — February 16, 2021 or March 22, 2021</b></p>

### Applicant Types

In this application cycle, two types of applicants will be considered, each with specific requirements.

**Existing Partners** – university, state-authorized, district-authorized, or out-of-state charter school operators which are in good standing, defined as receiving acceptable academic and financial accountability ratings for the three preceding school years, and never having their charters revoked.

**New Partners** – nonprofit organizations, institutes of higher education, governmental entities, or school operators that do not meet the qualifications of an existing operator.

**All applicants must complete Sections 1 – 3 of the application. Existing Partners and any applicant proposing to contract with an entity that has previously operated schools (often referred to as an Education Service Provider or ESP) must also complete the Existing/Experienced Partner Supplement and all related attachments**

## Instructions

The Board is pleased to invite proposals for new quality partners seeking to open a partnership school in current or subsequent school years. Prior to developing a proposal, please read this entire document.

### Components of the Proposal

- Narrative Proposal: The proposal is the formal application to the Board and is a comprehensive description of the school's educational, operational, and financial plans.
- Attachments: Throughout the proposal, specific documents are requested in addition to narrative answers. Attachments may not contain additional narrative unless specified. A comprehensive list of the attachments is provided in these instructions.
- Capacity Interview(s) (at the discretion of the District and Review Committee): Applicants may have the opportunity to present their plan and demonstrate the team's capacity to open and maintain a high-quality charter school, as well as to answer specific questions about their proposal.

### Specifications

- Applicants **must** submit proposals electronically and use any applicable template provided.
- Only responses placed within the text boxes provided will be considered in evaluation activities. All elements of the proposal must be presented in 11-point font and single-spaced.
- Each major section of the proposal (School Overview, Educational Program, etc.) and each attachment must begin on a separate page. *Application responses, including the existing questions and content, for sections 1-3 must not exceed 30 pages. This does not include attachments.*
- If you believe a particular question does not apply to your team or proposal, respond "Not Applicable" **and** state the reason this question is not applicable to your team or proposal.
- All required documents should be uploaded in the file format specified.
- Late or incorrectly formatted submissions will not be accepted.
- When submitting résumés, label each document with the individual's affiliation with the proposed school (e.g., board member, principal, etc.).

## Attachments

The following is a list of attachments to accompany the proposal. Note that not all attachments will be applicable for all applicants. It is the responsibility of the applicant to ensure they submit all attachments required for their proposal. Do not upload documents for any attachment that is not applicable.

1. Graduation standards (*high school applicants only*)
2. Enrollment policy
3. Discipline policy
4. Organization charts
5. Board documents
6. Board Member Information Form
7. Leadership team qualifications or role description
8. School leader qualifications or role description
9. Financial Plan Workbook
10. Financial plan narrative

## Applicant Code of Conduct

Members of the Board are obligated to make decisions in the best interests of children, free from personal or political influences. Similarly, charter school applicants have the responsibility of respecting and upholding the integrity of the charter school proposal process.

Specifically, charter school applicants shall not:

- Initiate, or attempt to initiate, any activity with a Trustee;
- Initiate, or attempt to initiate, any activity with a member of the Evaluation Team; or
- Direct any communications, including proposal documents, to a Trustee or to a member of the Evaluation Team.

Charter school applicants found to be in violation of these requirements may be deemed ineligible for consideration in future proposal processes.

## Public Disclosure

All charter school proposal materials submitted to the Board become public records.

## 2020 Request for Applications for Subchapter C Charters

**Please submit an application that addresses the following questions.** There are no page limits for individual topics, however overall page limits are noted for the Executive Summary, the Enrollment Summary, and each of Sections 1-4. Attachments are not included in these page limits.

**Please keep in mind that your application is a professional document.** The quality of the document that you submit should reflect the quality of the school that you propose to open. Evaluation Teams will be able to navigate well-organized, effectively edited documents easily, thereby focusing their energy on reviewing the content of each application. Grammar, spelling, and formatting all make an impression on an evaluator.

### **Plagiarism**

The Texas State University Student Handbook defines plagiarism as “the appropriation of another’s work and the unacknowledged incorporation of that work in one’s own written work” (Texas State University Student Handbook). Individuals and groups seeking the right and responsibility to educate public school children at public expense should be accountable to the highest standards of academic integrity. The Board considers plagiarism, including the copying of language from any other charter application without proper attribution, as grounds for immediate denial.

The Board understands that to implement an existing curriculum, instructional framework, or educational model (e.g., Montessori, arts integration, project-based learning, blended learning, etc.) with fidelity, key concepts must be discussed. However, it is not acceptable to copy and paste this discussion or description from another source. A high-quality applicant team with the capacity to operate a high-quality school must be able to thoughtfully explain in their own words how they intend to educate children. The Board also understands that existing operators proposing to replicate a model may use their own intellectual property, which is appropriate and acceptable.

## Applicant Information

<b>Name of Applicant Organization</b>	Click or tap here to enter text.
<b>Primary Contact Person</b>	Click or tap here to enter text.
<b>Mailing Address</b>	Click or tap here to enter text.
<b>Phone Number</b>	Click or tap here to enter text.
<b>Email</b>	Click or tap here to enter text.

**Names, current jobs and employers, and proposed roles of all persons on applicant team  
(Add lines as needed)**

<b>Full Name</b>	<b>Current Job Title and Employer</b>	<b>Position with Proposed School</b>
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

**We plan to apply as a:**

New Partner

Existing Partner

**Does this applicant team have charter school applications under consideration by any other authorizer(s) in the United States?**

Yes

No

**If Yes, complete the table below (Add lines as needed)**

<b>State</b>	<b>Authorizer</b>	<b>Proposed School Name</b>	<b>Application Due Date</b>	<b>Decision Date</b>
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

**Does this applicant team have new schools or campuses scheduled to open in the United States in the next five years?**

Yes

No

**If Yes, complete the table below (Add lines as needed)**

<b>Planned School Name</b>	<b>City</b>	<b>State</b>	<b>Opening Date</b>
----------------------------	-------------	--------------	---------------------



Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

## School Information

**NOTE: Complete this part for each school / campus included in this proposal.  
Duplicate as needed.**

Proposed School / Campus Name		Opening Year	Grades: Year 1	Grades: At Capacity
Click or tap here to enter text.		Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
<b>Proposed Location</b>				
<b>School District</b> <i>Identify the school district in which the charter school will be located.</i>		Click or tap here to enter text.		
<b>Address of Identified Facility</b> <i>If applicable.</i>		Click or tap here to enter text.		
<b>Projected Demographic Information</b>	<b>% FRL:</b> Click or tap here to enter text.	<b>% SpEd:</b> Click or tap here to enter text.	<b>% ELL:</b> Click or tap here to enter text.	
<b>Model / Specialty</b> <i>(Check all that apply)</i>				
<input type="checkbox"/> Alternative	<input type="checkbox"/> Career / Technical Ed.	<input type="checkbox"/> Military	<input type="checkbox"/> Montessori	
<input type="checkbox"/> Arts	<input type="checkbox"/> College Prep	<input type="checkbox"/> Language Immersion	<input type="checkbox"/> STEM	
<input type="checkbox"/> Blended Learning	<input type="checkbox"/> Other <i>(list):</i>	<input type="checkbox"/> Disability <i>(list):</i>		

<b>Name of Proposed Principal</b>	Click or tap here to enter text.
<b>Current Employment</b>	Click or tap here to enter text.
<b>Phone Number – Day</b>	Click or tap here to enter text.
<b>Phone Number – Evening</b>	Click or tap here to enter text.
<b>Email</b>	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 proposal, which will be assessed, in part, for the quality of alignment with the School Overview. Please reference page limit requirements on page 5 (Specifications).*

## Executive Summary (Limit: 4 Pages)

The Executive Summary should provide a concise overview of the proposed plan for the school; the outcomes you expect to achieve; 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 describes how the school will operate and what success looks like for students. The mission and vision statement provide the foundation for the entire proposal, and taken together, should identify the students and community to be served and illustrate what success for students will look like.
2. **Educational Need and Anticipated Student Population.** Describe the anticipated student population, students anticipated educational needs, and non-academic challenges the school is likely to encounter. Describe the rationale for selecting the location and targeting this student population.
3. **Education Plan / School Design.** Provide an overview of the education program of the proposed school, including major instructional methods, assessment strategies, and non-negotiables of the school model. Describe the evidence that demonstrates the school model will be successful in improving academic achievement for the targeted student population.

Click or tap here to enter text.

4. **Leadership and Governance.** List the current members of the school’s proposed leadership team and governing board, including their roles with the school and their current professional affiliations.

*Add lines to the following table, as needed. Do not list members of the applicant team who will not have an official leadership role with the school going forward, such as consultants.*

Full Name	Current Job Title and Employer	Position with Proposed School
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

## Enrollment Summary (Limit: 2 Pages)

- Complete the table below, illustrating the growth plan for the school. Indicate the school year (e.g., for Year 1, change 20xx to 2020) for each column.

**Note: Remove any rows for grades the school will not serve.**

Grade Level	Number of Students					
	Year 1 20xx	Year 2 20xx	Year 3 20xx	Year 4 20xx	Year 5 20xx	At Capacity 20xx
Pre-K	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
K	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
1	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
2	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
3	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
4	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
5	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
6	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
7	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
8	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
9	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
10	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
11	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
12	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
TOTAL	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

2. Then, briefly describe the rationale for the number of students and grade levels served in Year 1 and the basis for the growth plan as outlined in the table.

Click or tap here to enter text.

## Section 2 – Educational Program

*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

1. Provide evidence of the following:
  - a. 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;
  - b. 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;
  - c. 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;
  - d. A plan to maximize instructional time through consistent, efficient, and visible structures; and
  - e. 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.

Click or tap here to enter text.

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

2. Provide evidence of the following:
  - a. 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
  - b. Systems and structures the school will implement for students at risk of dropping out or not meeting exit standards.

Click or tap here to enter text.

### Special Populations and At-Risk Students

3. Provide evidence of the following:
  - a. A sound explanation of evidence from which the projection of anticipated special populations was derived;
  - b. 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;

- c. 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;
- d. 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
- e. 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.

Click or tap here to enter text.

## Student Recruitment and Enrollment

- 4. Provide evidence of the following:
  - a. 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
  - b. As **Attachment 2**, an Enrollment Policy that complies with state law and that ensures the school will be open to all eligible students.

Click or tap here to enter text.

## School Culture and Discipline

- 5. Provide evidence of the following:
  - a. 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;
  - b. 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;
  - c. 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;

- d. A system of proactive and responsive student support services (e.g., counseling, mentoring, external service referrals) to meet student needs;
- e. 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;
- f. 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
- g. Systems and processes for tracking discipline referrals and interventions to identify trends and adapt activities accordingly.

Click or tap here to enter text.

## Assessment and Evaluation

- 6. Provide evidence of the following:
  - a. Annual student performance goals that include targets aligned with the state accountability system;
  - b. An effective plan (including qualified personnel) and system to implement and interpret interim assessments that will measure academic progress – of individual students and student cohorts – throughout the school year and strategies to employ corrective actions when needed;
  - c. 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
  - d. Thoughtful, appropriate corrective actions that the school and network (if applicable) 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.

Click or tap here to enter text.



## Section 3 – Governance, Operating 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

7. Provide evidence of the following:
  - a. As **Attachment 4**, an organizational chart that clearly indicates all positions and delineates appropriate lines of authority; and
  - b. The proposed school's legal status (e.g., non-profit and federal tax exempt) and structure that are in compliance with state law.

Click or tap here to enter text.

### Governing Board

8. Provide evidence of the following:
  - a. The independence of the board as it relates to the authorizer;
  - b. 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;
  - c. 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;
  - d. 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;
  - e. 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
  - f. Sufficient capacity within and/or an appropriate relationship to any pre-existing non-profit board.

Click or tap here to enter text.

### Application Team Capacity

9. Provide evidence of the following:
  - a. 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
  - b. 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

- c. As **Attachment 8**, the board and/or network's (if applicable) 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
- d. 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.

Click or tap here to enter text.

## Staffing Plans, Hiring, Management, and Evaluation

10. Provide evidence of the following:

- a. 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;
- b. A plan for providing targeted and personalized support and development to retain a high-performing staff;
- c. Identification of evaluation tools and processes that will capture trends and track and promote teacher progress over time; and
- d. Effective planning for unsatisfactory leadership/teacher performance and turnover.

Click or tap here to enter text.

## Professional Development

11. Provide evidence of the following:

- a. Sensible allocation of responsibilities for professional development, including demonstrated understanding of, and preparation for, professional development needs; and
- b. 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.

Click or tap here to enter text.

## Facilities

12. Provide evidence of the following:

- a. Identification of an appropriate proposed school facility; or
- b. 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.

Click or tap here to enter text.

## 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

13. Provide evidence of the following:

- a. 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;
- b. 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;
- c. 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;
- d. As **Attachment 9**, a complete, realistic, and viable operating budget within the Financial Plan Workbook provided;
- e. 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
- f. Sound contingency planning to meet financial needs if anticipated revenues are not received or are lower than estimated.

Click or tap here to enter text.

# 2020-21 Local Campus Partnership Application

Existing Partner/Experienced Partner Supplement

# Existing Partner/Experienced Partner Supplement

(Limit: 5 Pages)

*A strong proposal from a partner that has previously operated schools, or a partner proposing to contract with an entity that has previously operated schools (often referred to as an Education Service Provider or ESP), is coherent overall and aligned internally with the school's mission and vision, Educational Program, Operational Plan, Financial Plan, and any other applicable attachments. Experienced Charter Partners should complete only Section 1, below. Any applicant proposing to contract with an Education Service Provider (ESP) should complete Sections 1 and 2.*

## Existing Charter Partner Track Record

1. Provide evidence of the following:
  - a. 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);
  - b. 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
  - c. A clear description of any history of charter revocations, non-renewals, withdrawals, or failures to open for the experienced partner applicant or ESP.

Click or tap here to enter text.

## ESP Management Plan and Legal Relationship

1. Provide evidence of the following:
  - a. 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;
- b. A compelling plan for the operation of the school in the case that the management agreement is terminated;
- c. 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;
- d. 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;
- e. 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
- f. 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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