Charter School Application Evaluation Rubric

A Model Resource for Missouri Charter Public School Sponsors

SCHOOL NAME

APPLICANT ORGANIZATION

REFERENCE NUMBER

EVALUATOR NAME

EVALUATION DATE

DEVELOPED BY THE NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

nacsa

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** Denotes sections required only of certain applicants*

Introduction and Guidelines

The Missouri Charter School Application Evaluation Rubric guides reviewers through an assessment of the key elements needed to design, manage, and operate a quality charter school consistent with Missouri law. Each section restates the application request and provides criteria for evaluating the applicant's response to the request.

For each section, you are asked to determine whether the response meets, partially meets or does not meet the standard. In general, the following definitions should guide your assessment:

Within each section, your rating and accompanying comments for the section should apply and reference those criteria.

Your comments and evidence are at least as significant as your rating.

Required Check Boxes

MEETS THE STANDARD

The response demonstrates a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

PARTIALLY MEETS THE STANDARD

The response meets some of the criteria, but lacks meaningful detail or requires additional information in one or more key areas.

DOES NOT MEET THE STANDARD

The response lacks meaningful detail; demonstrates lack of preparation; and/or otherwise raises substantial concerns about the applicant's understanding of and ability to implement an effective plan including if the respondent does not respond to the required section.

Supplemental Write-in Fields

STRENGTHS

Use the strengths box to identify notable positive aspects of the response.

CONCERNS AND ADDITIONAL QUESTIONS

Use the concerns and additional questions box to identify questions and concerns that bear on whether the application should be approved.

REFERENCE

Where applicable, use the "Reference" cell to note the relevant section and/or page number of the application.

Evaluator:

Recommendation Summary

Complete this page last.

OVERALL RECOMMENDATION

Would you recommend that the sponsor approve this application for a public charter school? Explain your recommendation in the Summary Comments section, below.

Check one *(required)*

- ☐ DENY
- ☐ APPROVE

SUMMARY COMMENTS *(1200 char. max)*

Summarize your assessment of the application focusing on key strengths and concerns, as applicable.

Signature

Date

Printed Name

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Evaluator:

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Evaluation Detail
A.1 Mission, Vision and Educational Philosophy

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Present a compelling 1-2 sentence mission statement that defines the purpose of the school;
- Identify the school's philosophical approach to educating students – ensure that priorities are meaningful, manageable and measurable, and focus on improving student outcomes; and
- Present a coherent vision of what the school will look like in 5–10 years if it is achieving its mission.

Applicant Instructions

A. Education Plan

The Education Plan should define what students will achieve; how they will achieve it; and how the school will evaluate performance. It should provide a clear picture of what a student who attends the school will experience with

(continues on reverse)

For Evaluator's Reference *(continued)*

respect to educational climate, structure, assessment and outcomes.

A.1 Mission, Vision and Educational Philosophy

State the school's mission and briefly present your vision for how the school will operate. Describe the school's educational foundation and the culture or ethos. Include an overview of the instructional methods and any research or experience that indicates why you have chosen to use this approach with your anticipated student population.

STATUTORY REFERENCE(S): § 160.405.1

Evaluator:

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Evaluation Detail
A.2 Curriculum and Instruction

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(800 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(800 char. max)* | *Reference*

For Evaluator's Reference

(continues on reverse)

For Evaluator's Reference *(continued)*

Evaluation Criteria

If the school intends to develop core curricula following approval, a response that meets the standard will

- Present a viable plan for development of the curricula for core academic areas and for ensuring alignment with Missouri Show-Me Standards and GLEs;
- Describe the framework for development of the curricula for core subjects; and
- Identify a sound research, experience or theoretical base and foundational materials that will guide curriculum development; and

Present a coherent framework for professional development that is likely to support effective development and implementation of the education program.

Applicant Instructions

A.2 Curriculum and Instruction

Provide a description of the curriculum to be used by the school, including measurable objectives and subject area content and skills for each grade level. Show how the curriculum aligns with the Missouri Show-Me Standards and Grade Level Expectations (GLEs). Discuss the specific instructional strategies that will be relevant or necessary to successful implementation of the curriculum. Discuss how curriculum and instruction needs are reflected in plans for professional development.

For core subjects, include sample lessons from two different grade levels that illustrate strategies for implementation of the curriculum consistent with the mission and educational philosophy.

If the school intends to use curricula that have already been developed, a response that meets the standard will

- Be consistent with the school's mission, education program design;
- Present a clear and coherent framework for teaching and learning – particularly in core academic areas – and will demonstrate alignment with Missouri Show-Me Standards and GLEs;
- Demonstrate understanding of relevant instructional strategies; and
- Present a coherent framework for professional development that is likely to support effective implementation of the curriculum.

STATUTORY REFERENCE(S): § 160.405.1(2).

Evaluator:

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Evaluation Detail
A.3 Career Education
If applying for Perkins

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will:

- Present a compelling rationale consistent with business and industry needs, student interests, and advisory committee recommendations;
- Present measureable program goals and objectives;
- Present learning objectives, content, credits and skills appropriate for the anticipated student populations, that are aligned with Show-Me Standards, Grade Level Expectations (GLEs) and appropriate business/industry standards;
- Include a convincing plan for transitioning students to work, further training, or higher education;
- A complete assessment plan to measure student progress; and

(continues on reverse)

For Evaluator's Reference *(continued)*

- A complete plan for evaluating the effectiveness of the program.

In addition to the items listed above, schools seeking funding under the Carl D. Perkins Career and Technical Education Act of 2006 must have the previously mentioned items plus:

Affirmation that a local plan will be submitted and will adhere to all the rules and regulations of the Act and will meet the core indicators of performance:

- Attainment of challenging academic content standards and academic achievement standards;
- Attainment of career and technical skill proficiencies;
- Attainment of a secondary diploma or equivalency, a proficiency credential, certificate, or degree in conjunction with a secondary school diploma;
- Graduation rates;
- Placement in postsecondary education or advanced training, in military service, or in employment; and
- Participation in and completion of career and technical education programs that lead to non-traditional fields.

Applicant Instructions

A.3 Career Education

Applicants who intend to operate career education programs must complete the Application for Approval of Career Education Programs. Specifically, the applicant should present the following:

- Provide the rationale for the program. Include results of community-based assessments, student interest survey data, advisory committee recommendations, and needs identified by business and industry/employment outlook. Note: The student interest survey data must be derived from Missouri Connections or a similar student interest assessment.
- List the program goals and objectives in measurable terms.
- Provide a topical outline of major units of instruction in the proposed program.
- Identify program instructional contact hours, course sequence, and grade levels (if applicable).
- Identify major methods of instructional delivery (laboratory, classroom, project-based, problem-based, etc.).
- Identify the Career and Technical Student Organization and describe how it will be used to support curriculum, instruction, and assessment.
- Identify postsecondary partners and/or business/apprenticeship partners. Provide a brief summary of possible postsecondary articulation agreements/dual credit agreements and/or partnership agreements that will be put in place once program/course is operational.
- Identify and describe opportunities for assisting students in transitions to the workplace or continued education through such activities as experiential education, cooperative education, internships, apprenticeships, job shadowing, and job placement.
- Identify the assessment plan to measure student progress including competency achievement.
- Identify the plan for evaluating the effectiveness of the program, including evaluation instrument(s) used, methods of evaluation, and how results will be used for program improvement. For secondary level programs, identify the process for including program improvements in the overall district Comprehensive School Improvement Plan (CSIP).

Statutory Reference(s): 160.405.2

Evaluator:

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Evaluation Detail
A.4 School Calendar and Daily Schedule

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Satisfy the requirement for a full school term as defined in Mo. Rev. Stat. § 160.011;
- Comply with minimum requirements for the number of school days and hours pursuant to Mo. Rev. Stat. § 160.041;
- Align with the school's educational mission and goals; and
- Provide, in advance, for the make up of a minimum of six inclement weather closure days pursuant to Mo. Rev. Stat. § 171.033.2.

(continues on reverse)

For Evaluator's Reference *(continued)*

Applicant Instructions

A.4 School Calendar and Daily Schedule

Present the school calendar showing the number of days the school will be in session and sample daily class schedules showing daily hours of operation and allocation of time for core instruction, supplemental instruction, extra-curriculars, and after-school activities, as applicable.

Required Exhibits

- ☐ Sample daily schedule for one grade in each division at which the school intends to operate (elementary, middle and/or high school)
- ☐ Annual calendar for the first year of operation

STATUTORY REFERENCE(S): § 160.405.1; 160.405.5(2); 160.041

Evaluator:

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Evaluation Detail
A.5 Target Population

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Present evidence to indicate that the enrollment projections by grade and school-wide for each year of the charter are realistic; and
- Demonstrate a clear understanding of the students the school intends to and is likely to serve;
- Present a persuasive explanation of how the proposed mission, curriculum, teaching methods and services are likely to meet the needs of the target population

Applicant Instructions

A.5 Target Population

The section on the Target Population should include a completed Anticipated Enrollment Table for each year of the school's proposed charter. It should describe the

(continues on reverse)

For Evaluator's Reference *(continued)*

anticipated population of the school and should explain how the proposed mission, curriculum, teaching methods and services align with the educational needs of that population.

STATUTORY REFERENCE(S): § 160.405.2(4)

Dropout and At-Risk Populations

Missouri sponsors are required to grant at least one-third of charters to schools that actively recruit dropouts or high-risk students as their student body. A "high-risk" student is one who is at least one year behind in satisfactory completion of course work or obtaining credits for graduation, pregnant or a parent, homeless or has been homeless sometime within the preceding six months, has limited English proficiency, has been suspended from school three or more times, is eligible for free or reduced-price school lunch, or has been referred by the school district for enrollment in an alternative program. To the extent that the applicants intend to serve a high dropout and/or at-risk population, the response should focus on this group, in particular.

Evaluator:

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Evaluation Detail
A.6 Special Student Populations

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Demonstrate understanding of and capacity to meet state and federal requirements regarding identification and education of the likely ELL population;
- Demonstrate understanding of and capacity to meet state and federal requirements regarding the identification and education of students with disabilities;
- Indicate a commitment to serving the full range of needs of students with disabilities; and

Indicate a commitment to serving the full range of needs of special education students.

Applicant Instructions

A.6 Special Student Populations

Describe the school's plan for educating children with special needs, particularly those with limited English

(continues on reverse)

For Evaluator's Reference *(continued)*

proficiency and those identified with disabilities. Explain specifically how these students will be identified, how the school will develop plans for their education, how their progress will be monitored, and how the school has budgeted and staffed to meet those responsibilities. In addition, explain how the school's curriculum and approach to instruction will be designed or adapted to serve those students.

STATUTORY REFERENCE(S): § 160.405.1(2).

Evaluator:

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Evaluation Detail
A.7 School-Specific Goals and Objectives

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(800 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(800 char. max)* | *Reference*

For Evaluator's Reference

(continues on reverse)

For Evaluator's Reference *(continued)*

Evaluation Criteria

A response that meets the standard will

- Align with the school's mission and educational program;
- Define goals and objectives that are specific, measurable, ambitious and attainable, relevant and time-bound;
- Align with the sponsor's performance expectations outlined in the Missouri monitoring and renewal framework;
- Set high standards for student learning; and
- Present clear criteria for promotion from one level to the next, and for graduation.

Applicant Instructions

A.7 School-Specific Goals and Objectives

Like all public schools, charter schools are subject to state accountability requirements. For all approved schools, the charter contract will include a set of core educational performance expectations that reflect state accountability requirements and the sponsor's performance expectations outlined in the Missouri monitoring and renewal framework. In addition to those standard requirements, most schools have goals that are particular to the school's educational philosophy and organizational priorities.

Identify two key academic goals and one non-academic goal for which the school plans to hold itself accountable. Explain how those performance standards align with the school's mission, the proposed educational program, the statewide accountability system, and the statewide accountability system.

Well-developed school-specific goals will have the following characteristics:

- Specific
- Measurable (based on identified indicators and expected performance levels and a reliable measurement instrument)
- Ambitious and attainable
- Relevant (to your mission)
- Time-bound

Following are examples of performance goals.

Example 1: Student Gains
At all grade levels, students at the charter school will average 1.1 Years of academic growth as measured by multiple administrations of a nationally norm-referenced growth-measured exam.

Example 2: Performance Status
(Percent) of students enrolled at the charter school for a three consecutive year period will achieve proficient or advanced status on the state's annual MAP test assessment.

Example 3: Student Re-Enrollment (Non-academic)
The charter school will retain (percent) of its enrolled students year-to-year during its first three years of operation.

Example 4: Parent Satisfaction (Non-academic)
The charter school will demonstrate a (percent) overall satisfaction rating in an annual survey administered to parents or designated legal guardians of students attending the school during each academic year.

STATUTORY REFERENCE(S): § 160.405.1(1); 160.405.1(4); 160.405.5(6).

Evaluator:

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Evaluation Detail
A.7.1 Comprehensive Performance Measures

optional for high-risk and alternative schools

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Present performance measures that are a valid and reliable means for determining whether students are meeting performance standards;
- Ensure that the school will be held to the same performance standards as other schools; and
- Be specific about the time frame in which students will be expected to meet the performance standards.

Applicant Instructions

A.7.1 Comprehensive Performance Measures

Missouri's charter school law places a priority on meeting the needs of high-risk and alternative populations. Such schools will be held to the same performance standards as other schools, but students in those schools may meet

(continues on reverse)

For Evaluator's Reference *(continued)*

performance standards on a different time frame.

Applicants proposing to operate an alternative charter school or one serving high-risk students in which students may propose comprehensive school-specific academic and behavioral measures.

Describe the comprehensive academic and behavioral measures that the school proposes to use. Explain how those measures align with the school's mission, the proposed educational program, and the statewide accountability system.

If approved, the comprehensive measures will be used in addition to standardized public school measures to evaluate school performance.

STATUTORY REFERENCE(S): § 160.405.5(6)(b).

Evaluator:

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Evaluation Detail
A.8 Assessment

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(800 char. max)*	*Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(800 char. max)*	*Reference*

For Evaluator's Reference

(continues on reverse)

For Evaluator's Reference *(continued)*

Evaluation Criteria

A response that meets the standard will

- Align with the school's mission and overall educational priorities;
- Demonstrate understanding of the school's obligation to participate in the statewide system of assessment and accountability;
- Present a clear, credible, and sound plan for measuring and reporting the educational performance and progress of individual students, cohorts, and the charter school as a whole including valid and reliable measures of student outcomes;
- Explain how the school will use assessment data to drive key decisions aimed at improving academic outcomes; and
- Demonstrate understanding of and commitment to compliance with assessment requirements applicable to all Missouri public schools consistent with state law and relevant policies of the state board of education including the MAP and end of course exams, as applicable.

Applicant Instructions

A.8 Assessment

Describe the school's approach to assessment. Explain how the school will evaluate progress of individual students, cohorts over time, and the school as a whole toward meeting the statewide requirements. In particular, describe how the school will determine proficiency (by grade, achievement level, or grouping level) for mathematics, communication arts and one other subject area on an interim basis. For high school courses, what is the school's plan for developing and using end of course assessments?

What are the school's policies and criteria for promoting students to the next level and for graduation from the school?

How will the school use assessment information to modify the educational program and improve instruction, student learning and staff development?

STATUTORY REFERENCE(S): § 160.405.1(2); 160.405.5(6); 160.518

Evaluator:

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Evaluation Detail
A.9 School Climate and Discipline

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Describe an approach to student discipline that is reasonably likely to promote a safe and orderly learning environment; and
- Present legally sound policies for student discipline, suspension, dismissal and expulsion or a reasonable plan for their development; and
- Outline a clear strategy for engaging parents and guardians in the life and culture of the school; and
- Include evidence that the school will ensure a safe environment conducive to learning

Applicant Instructions

A.9 School Climate and Discipline

Describe the strategies the school will employ to develop and sustain a safe and orderly school climate that supports

(continues on reverse)

For Evaluator's Reference *(continued)*

fulfillment of the educational goals. Explain the school's student behavior philosophy and discipline policy or code of conduct for both the general student population and for students with special needs. The full discipline policy should be included as an attachment if already developed.

Explain how the school will encourage family involvement and communication to support student learning, and how it will gauge satisfaction with school climate

STATUTORY REFERENCE(S): § 160.405.1(6)

Evaluator:

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Evaluation Detail
B.1 Governance

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Present proper documentation that the entity proposing to hold the charter is a Missouri nonprofit corporation;
- Documentation of LEA status, if applicable, and

In the case of pre-existing organizations, demonstrate that the operation of the proposed school is consistent with the organization's overall mission and operation.

Applicant Instructions

B. Organizational Plan

The organizational plan should provide an understanding of how the school will be operated, beginning with its governance and management. It should present a clear picture of the school's operating priorities, delegation of responsibilities, and relationships with key stakeholders.

(continues on reverse)

For Evaluator's Reference *(continued)*

B.1 Governance

Describe the entity that will hold the charter and be responsible for governing the school. Provide documentation of the entity's legal status including Articles of Incorporation, Bylaws and documentation of legal not-for-profit status.

To the extent that the organization exists and has functions independent of the operation of the proposed school, provide a brief description of the organization, its history, its current operation, and the relationship between its existing operations and the proposed school.

Required Exhibits

- ☐ Articles of Incorporation
- ☐ Corporate By-Laws
- ☐ Documentation that the applicant is a Missouri nonprofit corporation and has applied for and/or received not-for-profit status from the Internal Revenue Service
- ☐ Documentation of criminal background checks for all prospective board members or assurance of satisfactory completion as a condition of service
- ☐ Documentation of child abuse registry checks for all prospective board members or assurance of satisfactory completion as a condition of service

STATUTORY REFERENCE(S): § 160.400.5; 160.400.11; 160.405.1(5); 160.405.2(1)

Evaluator:

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Evaluation Detail
B.2 Governing Board Composition

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will indicate that the board

- Has capacity to oversee the successful development and implementation of the education program presented in the application;
- Has capacity to oversee the effective and responsible management of public funds;
- Has capacity to oversee and be responsible for the school's compliance with its legal obligations;
- Will represent the community well;
- Is aware of their duties and responsibilities as public servants in accordance with RSMo section 105.450; and
- Will generally have the capacity to found and sustain a quality school.

(continues on reverse)

For Evaluator's Reference *(continued)*

Applicant Instructions

B.2 Governing Board Composition

List the members of the proposed governing board including their names, current employment, and relevant experience or qualifications for serving on the board including but not limited to relationship to the community in which the school will be located.

For each proposed governing board member, the application should include, as an attachment, a resume or CV, and the completed form labeled *Appendix A: Request for Information from Prospective Charter School Board Members.*

Describe any specific plans for recruitment of additional governing board members including but not limited to plans that would involve parental, professional educator or community involvement in the governance of the school.

Required Exhibits

- ☐ Prospective Board Member Resumes or C.V.s
- ☐ Completed form labeled appendix a: request for information from prospective charter school board members for all prospective board members

STATUTORY REFERENCE(S): § 160.405.1(5); 160.405.2(1); 105.450

Evaluator:

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Evaluation Detail
B.3 Management and Operation

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will include

- Clear delineation of the roles and responsibilities for administering the day-to-day activities of the school;
- Demonstrated understanding of management needs and priorities; and
- A staffing plan that appears viable and adequate for effective implementation of the proposed educational program.

Applicant Instructions

B.3 Management and Operation

Describe the organizational structure of the school and its day-to-day operation. Explain the management roles and responsibilities of key administrators with respect

(continues on reverse)

For Evaluator's Reference *(continued)*

to instructional leadership, curriculum development and implementation, personnel decisions, budgeting, financial management, legal compliance, and any special staffing needs.

Your response should describe the primary responsibilities for each key management position and should identify critical skills or experience that will be priorities for fulfillment of those responsibilities. Give particular attention to the roles, responsibilities and actual (if already identified) or desired qualifications of the school leader. Discuss any plans for recruiting and selection of the school leader if no already identified.

Required Exhibits

- ☐ Organizational Chart that shows the staffing structure and reporting responsibilities for the board, administration and staff
- ☐ Key position descriptions including critical skills or experience every employee that they intend to hire based on organizational chart (description can be general for core teachers). Qualifications for hiring should provide assurance that background checks and child abuse registry will be conducted for every employee in accordance with the law.

STATUTORY REFERENCE(S): § 160.405.1(5)

Evaluator:

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Evaluation Detail
B.3.1 Education Service Providers

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

All applicants are asked to declare whether they intend to contract with an education service provider (ESP). The term "education service provider" refers to any number of organizations that contract with the governing board of a school to provide comprehensive services. The major types of ESPs that serve charter schools are education management organizations (EMOs), charter management organizations (CMOs), and comprehensive school design providers.

After making the initial declaration, applicants should complete the remainder of the section only if the school expects to contract with an ESP. Other applicants should proceed directly to the next section, Community Involvement.

Evaluation Criteria

The response should present a clear picture of the contractual relationship and accountability between the ESP and the school's governing board that is consistent with the school's mission and educational program.

(continues on reverse)

For Evaluator's Reference *(continued)*

A response that meets the standard will present

- A persuasive explanation of the reasons for contracting with an education service provider, in general, and this provider, in particular;
- A sense of how the proposed relationship with the ESP will further the school's mission and program;
- A clear description of the services to be provided by the ESP;
- A coherent delineation of the roles and responsibilities between the school's governing board, management and the ESP; and

ESP performance expectations that are consistent with the school's accountability requirements and the means by which the board will hold the ESP accountable for meeting those expectations.

Applicant Instructions

B.3.1 Education Service Providers

Select the statement that is applicable and proceed as directed:

- ☐ We intend to contract with an education service provider. *Continue with completion of this section.*
- ☐ We do not intend to contract with an education service provider. *Skip to the next section.*

If the school expects to contract for services with an education service provider, discuss the school's decision to work with an ESP, in general, and the selected ESP, in particular. Describe the planned relationship between the school and the ESP and how that relationship will further the school's mission and program. Provide a clear description of the services to be provided by the ESP. Describe the ESP's roles and responsibilities in relation to the school's management and governing board. Describe the school's performance expectations for the ESP. In other words, how will the school evaluate esp performance?

Required Exhibits

- Background information on the ESP including relevant performance data for other schools that the ESP has managed
- A list of any other schools managed by the ESP in the state of Missouri with contact information
- The services agreement as executed between the school and the ESP (or template version if not yet executed)

STATUTORY REFERENCE(S): § 160.405.1(5)

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
B.4 Staffing and Human Resources

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Present strategies for recruiting and retaining effective teachers that are realistic and reasonably likely to be effective;
- Demonstrate a sound understanding of staffing needs that are aligned with the budget and with the school's anticipated enrollment;
- Demonstrate a sound understanding of staffing needs with respect to successful implementation of the educational program; and
- Present a plan that is reasonably likely to attract and retain effective staff.

(continues on reverse)

For Evaluator's Reference *(continued)*

Applicant Instructions

B.4 Staffing and Human Resources

Discuss the staffing plan for the term of the charter including anticipated staffing needs and recruitment strategies. Discuss how the plan supports sound operation and successful implementation of the school's educational program.

Describe the instructional skills, experience, and development that teachers will need to have in order to be successful. How are those needs reflected in the plan for teacher recruitment?

Include a draft of a Staff Handbook or Employment Manual if developed. In responding to this section, consider the following questions:

- What strategies does the school have for recruiting and retaining effective teachers?
- How do the staffing-related budget assumptions align with educational program needs?
- How does the staffing plan reflect the anticipated enrollment and growth of the school?
- How will the school determine appropriate experience, training and skills of non-certificated instructional personnel?
- What will be the employer-employee relationship for staff at the school?

STATUTORY REFERENCE(S): § 160.415

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
B.4.1 Four-year College and/ or University Affiliation

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

A college or university affiliation is not required for a charter school. Applicants should respond to and be evaluated on this section only if they propose to have a college or university affiliation.

Evaluation Criteria

A response that meets the standard will

- Present a clear plan for college or university affiliation that is aligned with and likely to further the school's mission;
- Demonstrate a substantial likelihood that the school will be successful in establishing the proposed affiliation; and

(continues on reverse)

For Evaluator's Reference *(continued)*

- Demonstrate that the college or university has the capacity and commitment to fulfill its anticipated role.

Applicant Instructions

B.4.1 Four-year College and/or University Affiliation

Discuss any affiliation that the school intends to have with a four-year college or university, including a private college or university, or a community college. Address the specific purpose(s) of the affiliation including teacher training and staff development, curriculum and assessment development, use of physical facilities, or other purposes beyond sponsorship duties.

Describe your plans for developing the affiliation and any steps already taken. Include evidence that you are likely to be successful in establishing the proposed affiliation such as letters of support or other documentation of commitment from the college or university.

STATUTORY REFERENCE(S): § 160.405.8.

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
B.5 Student Recruitment and Enrollment

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Include an outreach and recruitment plan that demonstrates understanding of the community to be served and is likely to be effective including for families traditionally less informed about educational options;
- Present enrollment projections that are supported by evidence of actual or potential demand; and
- Include enrollment and admissions policies and plans that comply with the requirements of section 160.410.

Applicant Instructions

B.5 Student Recruitment and Enrollment

In the table provided, enter enrollment projections for the school, by year, for the first five years of operation.

Describe the plan for recruitment and enrollment of students. Explain how the school will be publicized and

(continues on reverse)

For Evaluator's Reference *(continued)*

marketed throughout the community to a broad cross-section of families and prospective students. What strategies will you use to reach families that are traditionally less informed about educational options?

Include an explanation and evidence to support the enrollment projections. Relevant evidence may include, among other things, the following:

- Community demographic information (numbers of potential students);
- Documentation of community or family demand for the proposed school such as letters of intent to enroll; and
- Enrollment data from schools currently operating in community.

Describe the proposed enrollment process and provide assurances that the charter school will comply with the requirements of section 160.410, Rev. Stat. Mo.

If the charter school intends to establish admissions preferences based on a geographical area around the school, sibling enrollment in the school, parent employment at the school, or – in the case of a workplace charter – parent employment in the business district or business site of the school, provide a clear description of the proposed preference and how it will apply in the event that capacity is insufficient to enroll all pupils who submit a timely application.[1]

STATUTORY REFERENCE(S): § 160.410

[1] *Specific attendance limitations apply for charter schools sponsored in Kansas City and St. Louis. In Kansas City, a parent must be resident in the district. In St. Louis, a parent needs to meet residency or non-minority or non-minority requirements depending on the county. Sponsors receiving applications for Kansas City and St. Louis should consult legal counsel or the Department of Elementary and Secondary Education for charter school enrollment guidance.*

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
B.6 Community Involvement

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Present a vision and strategy for community involvement that is reasonably likely to further the school's mission and program; and

Provide evidence that anticipated partnerships are realistic and achievable.

Applicant Instructions

B.6 Community Involvement

Discuss your plans for community involvement in the governance and operation of the school. Describe the nature of potential partnerships including examples of how community partners will play an integral part in the life of the school and identify specific organizations with which the school is already working, or likely to partner.

(continues on reverse)

For Evaluator's Reference *(continued)*

Describe your plans for developing community partnerships and any specific steps you have already taken. Include in your response relevant documentation such as letters of support or commitments to provide or share resources.

STATUTORY REFERENCE(S): § 160.405.1(5); 160.420.5

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
B.6.1 Joint Application

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

The following section should be completed if, pursuant to section 160.400.8, Rev. Stat. Mo., The school proposes to be affiliated with a college, university, museum, educational institution, other not-for-profit organization, or other partner that is not an educational service provider. Applicants that do not plan to have such an affiliation should proceed directly to part C, business plan.

Evaluation Criteria

A response that meets the standard will

- Include complete information about each affiliated partner;
- Provide documentation regarding the terms of the joint partnership;

Present persuasive evidence that the plan for the affiliation is sound and that the purpose(s) is/are likely to support

(continues on reverse)

achievement of the school's mission.

Applicant Instructions

B.6.1 Joint Application

If you are proposing to affiliate with a college, university, museum, educational institution, other not-for-profit entity, or any other partner, describe the rationale for the affiliation, the benefit that the school expects to receive from the partnership, and provide the following information for each affiliated organization:

- Name of the organization;
- A letter of intent or commitment from a bona fide representative of the partner organization indicating that the organization is undertaking the affiliation and the terms and extent of the undertaking;
- The name of a contact person for the partner organization; and
- Contact information (address, phone number, facsimile number, and e-mail address) for the contact person at the affiliated organization;
- A description of the nature and purpose of the proposed affiliation including the specific purpose(s) for the affiliation (e.g., Teacher training and staff development, curriculum and assessment, access to physical facilities, etc.).

STATUTORY REFERENCE(S): § 160.400.8

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
C.1 Budget

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Present budget priorities that are consistent with and support key parts of the plan, including the school's mission, educational program, staffing and facility;
- Present realistic, evidence-based revenue and expenditure assumptions, including for any plan to incur and repay debt;
- Present viable strategies for meeting potential budget and cash flow challenges, particularly for the first year of operation; and
- Demonstrate a commitment to maintaining the financial viability of the school.

(continues on reverse)

Applicant Instructions

C. Business plan

The business plan should provide an understanding of how the applicants intend to develop and manage the school's infrastructure and finances. It should present a clear picture of the school's revenue projections; expenditure requirements; facilities needs; transportation and food service plans; and pre-opening plan.

C.1 Budget

Use the *Charter School Budget Template* (*Appendix B*) to detail the school's estimated revenues and expenditures for the proposed term of the charter including the pre-operational startup year.

Provide a cash flow analysis for the first fiscal year of operation (July 1–June 30).

Include explanation and discussion of key budget assumptions underlying the budget projections and explain how the budget aligns with and supports implementation of the educational program. If the school anticipates incurring debt for any reason, such as for acquisition of its facility, the budget must address the schedule for debt repayment and the budget discussion should elaborate on the repayment assumptions and plan.

Discuss the school's contingency plans for cash flow challenges, a budget shortfall, lower than expected student enrollment or other financial challenges in the early years of operation?

Required Exhibits

- ☐ Budget for the proposed charter term
- ☐ Opening year cash flow analysis

STATUTORY REFERENCE(S): § 160.405.1; 160.415.11

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
C.2 Financial Management

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Demonstrate understanding of the school's financial management obligations;
- Present evidence that the school is prepared to adhere to generally accepted accounting practices and the Missouri Financial Accounting Manual;
- Present evidence that the school will has or has capacity to develop adequate policies and processes for tracking enrollment and attendance eligibility, eligibility for free and reduced priced lunch; special education and limited English proficient enrollment; and

Demonstrate preparation to meet its insurance, annual audit, annual financial report and other key financial management obligations.

(continues on reverse)

For Evaluator's Reference *(continued)*

Applicant Instructions

C.2 Financial Management

Describe the systems and procedures for managing the school's finances and identify the staff position(s) that will be responsible for financial oversight and management. Describe how the school's finances will be managed and who will be responsible for the protection of student and financial records. Your response should address, among other things, the school's plans in the following areas:

- Provisions for an annual audit consistent with its LEA status;
- Development and dissemination of an annual financial report; and
- Providing recommended liability insurance to indemnify the school, its board, staff and teachers against tort claims.

STATUTORY REFERENCE(S): § 160.405.1; 160.405.5(4)

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
C.3 Facility

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Reflect a sound understanding of facilities needs;
- Demonstrate knowledge of facilities costs including, as applicable, cost of purchasing, leaseing, building, or renovating an educational facility that conforms to applicable health, safety, and occupancy requirements;
- Present evidence to support facilities-related budget assumptions;
- Include evidence that the proposed facility will be adequate *or* present a plan for securing a facility that is appropriate and adequate for the school's educational program, anticipated location, and target population; and
- Demonstrate that the school's plan for acquisition of a facility is financially viable.

(continues on reverse)

For Evaluator's Reference *(continued)*

Applicant Instructions

C.3 Facility

Discuss the school's facility needs based on the educational program and anticipated enrollment. If the applicants have identified a facility, indicate the location (street address, city, and zip code) and provide either floor plans or a description including, at a minimum, the number and size of the classrooms, common areas, administrative areas, recreational space, any community facilities, and any residential facilities. Explain how the facility will meet the needs of students and provide an assurance that it will be accessible to students with physical disabilities.

To the extent that the school has discussed or established specific lease or purchase terms, include discussion of the proposed terms and any draft agreements. If the school intends to lease facilities from a school district, pursuant to section 160.405.9, Discuss the status of those plans and provide evidence of any district commitments.

To the extent that the facility will require renovation or 'build out,' describe those plans including anticipated timing and cost.

If the school anticipates incurring debt as part of its facilities acquisition plan, the budget must include a repayment plan, as indicated in the Budget section, above.

If a facility has not been selected, specify potential locations that are under consideration and discuss the process and time line for selecting, acquiring, renovating (if appropriate) and taking occupancy of a suitable facility.

STATUTORY REFERENCE(S): §§ 160.405.5(2),(4)

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
C.4 Transportation

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

If the applicants have elected to provide transportation, a response that meets the standard will

- Present a thorough, realistic, and cost-effective transportation plan; and
- Provide specific evidence of third party readiness and terms for providing transportation services consistent with the school's budget assumptions. 3rd party must collect required information [include in application].

If the applicants have elected not to provide transportation, a response that meets the standard will

- Present a clear statement of the school's intent not to provide transportation services;
- Describe viable transportation options for students; and
- Describe contingency plans for students requiring transportation due to a physical disability.

(continues on reverse)

For Evaluator's Reference *(continued)*

Evaluation note
with the exception of related services required under an Individualized Education Plan, charter schools are not required to provide transportation for students to and from the school.

Applicant Instructions

C.4 Transportation

State whether the school intends to provide transportation for students. If so, describe the transportation plan and explain budget revenue and expenditure assumptions including those related to anticipated state aid pursuant to section 163.161 R.S.Mo.

If the school intends to contract with the local district or any other third party for transportation services, discuss the status of those plans and provide evidence of the third party's readiness and terms for providing those services.

STATUTORY REFERENCE(S): § 160.415.8.

Evaluator:

nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Evaluation Detail
C.5 Insurance

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will

- Evidence of requisite insurance coverage or ability to obtain requisite insurance coverage

Evidence of requisite surety bond for school CFO or ability to obtain requisite surety bond

Applicant Instructions

C.5 Insurance

Provide evidence of ability and preparation to obtain liability insurance coverage (minimum A-BEST rating) in the following areas:

- Directors' and Officers' Liability
- Commercial General Comprehensive Liability that also expressly covers corporal punishment and athletic

(continues on reverse)

For Evaluator's Reference *(continued)*

participation

- Educators' Legal Liability
- Employment Practices Liability
- Sexual Abuse Liability (separate policy or a separate part of general comprehensive insurance with independent limits)
- Automobile Liability
- Excess Liability or Umbrella (i.e., bundled commercial general liability, directors' and officers' liability, legal liability, employment practices liability, automobile liability, and sexual abuse liability)
- Workers Compensation Liability
- Surety bond for the school's chief financial officer in an amount to be determined based on the cash flow of the school.

Include evidence to support the budget expense assumptions related to insuring the schools such as copies of broker or agency estimates.

STATUTORY REFERENCE(S): § 160.405.11; 160.405.13.

Evaluator:

Evaluation Detail
C.6 Pre-Opening Plan

Check one *(required)*

- ☐ MEETS THE STANDARD
- ☐ PARTIALLY MEETS THE STANDARD
- ☐ DOES NOT MEET THE STANDARD

STRENGTHS *(500 char. max)* | *Reference*

CONCERNS AND ADDITIONAL QUESTIONS *(500 char. max)* | *Reference*

For Evaluator's Reference

Evaluation Criteria

A response that meets the standard will demonstrate understanding of key pre-opening responsibilities consistent with the school's education, organizational and business plans.

Applicant Instructions

C.6 Pre-Opening Plan

Provide a Pre-Opening Plan that documents key tasks to be completed between approval of the application and opening of the school. Include a schedule for initiation, development and completion those tasks, identify primary responsibility by individual or position, and document anticipated resource needs.

STATUTORY REFERENCE(S): § 160.405.5.