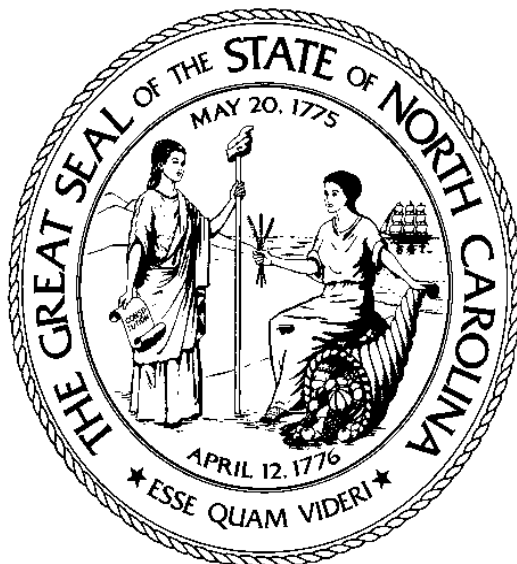


Proposed School:  
Application Submitted by:

Reviewer:  
Date:



### **Application Evaluation Packet for New Charter Schools**

For each section, please rate the response then explain your rating by specifying strengths and weaknesses in the space provided. Where applicable, you should elaborate on concerns by specifying additional information you would request or follow-up questions that you have.

Each section presents key characteristics of an "excellent" response. In general, the following definitions should guide your ratings.

- **Inadequate:** The response either fails to entirely address the selection criteria or addresses some of the criteria; yet the responses lack adequate detail and/or raise substantial concerns about the applicant's preparation for and ability to start or operate a charter school successfully.
- **Average:** The response indicates solid preparation and grasp of key issues. It contains some of the characteristics of an excellent response although additional support or information may be needed in places.
- **Excellent:** The response demonstrates a thorough understanding of key issues and the ability to start a charter school successfully. It addresses the topic with clear, specific and accurate information that reflects thorough preparation.

Subcommittee Signatures

\_\_\_\_\_  
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Date\_\_\_\_\_  
Date\_\_\_\_\_  
Date\_\_\_\_\_  
Date\_\_\_\_\_  
Date\_\_\_\_\_

### **A. Mission Statement and Purpose for Existence**

An excellent mission statement will have the following characteristics:

- Clear, focused and compelling
- Likely to improve education outcomes
- Expressing clear guiding purposes
- Identifying priorities that meet the six legislated purposes of the NC charter school law
- Specific and measurable performance objectives, over time, outlining the school's achievement goals
- Evidence of strong community support and stated need for the school.

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Mission Statement:</u></b> <b>Strengths</b>	<b>Page Reference</b>
<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

### **B. Governance**

An excellent application will demonstrate the following characteristics related to the Governance and Management plan:

- Proposed board members will contribute the wide range of experience and expertise that will be needed to oversee a successful charter school such as education, management, financial planning, law, and community outreach (including the attachment of their one page resumes)
- Clear description of selection and removal procedures, term limits, meeting schedules, and powers and duties of board members (including a conflict of interest policy)
- Organizational goals and performance measures to chart
- Clear distinction between the roles and responsibilities of the board members, school administrators, and EMO staff (if applicable)
- Copy of the EMO management agreement (if applicable) and how the charter school board of directors will retain ultimate responsibility for the school
- Details explaining how the board evaluated the selected EMO as compared to others and how this nonprofit board will annually evaluate this relationship against measurable objectives
- Provide evidence that the proposed EMO has a history of academic and financial successes
- Plan for meaningful involvement of parents and community members in the governance of the school
- Organizational plan, with a chart, that clearly outlines roles and responsibilities for implementing the school program successfully as well as a description of entities identified on the provided chart.
- Inclusion of the organizational articles of incorporation, by laws, and conflict of interest policies that reveal clear understanding of charter school governance
- Clear description of the enrollment policy including which, if any, statutorily allowed enrollment preferences the school proposes to offer
- Explanation of criteria for enrollment decisions and the lottery process to be used
- Clear procedures for withdrawals and transfers from the school that will support an orderly transition for exiting students or a clear plan for developing such procedures

School Name:

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Governance and Operation:</u></b> <b>Strengths</b>	<b>Page Reference</b>

<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

### **C. Education Program**

An excellent proposal will demonstrate the following qualities related to the Educational Program:

- Alignment between the school's mission and its goals, objectives and standards
- Goals and objectives that are clear, specific, measurable, ambitious and attainable
- Performance standards aligned with the goals as well as state and federal requirements
- The curriculum framework is clearly presented, aligned with the school's mission, and provides an appropriate level of detail for the objectives, content, and skills for each subject and for all grades the school will serve.
- Details about the type of learning environment , class size, and teaching methods
- The curriculum is supported by research and by applicant experience.
- A clear outline of how the school will monitor the implementation of the curriculum. The plan identifies a timeline, a lead contact, action steps, and how this information will be used in facilitating professional development.
- The school day and school calendar are structured in ways that align with the educational program.
- A convincing plan for ongoing curriculum development (e.g., revision of standards and benchmarks, improvement of curriculum alignment, and assessment development) is included.
- Details in how the school will involve parents and community within the educational program.
- Describe how students that are not performing at expected levels – whether at-risk or gifted – will receive additional assistance to ensure continued student growth.
- Listing of any co-curricular or extra-curricular programs that are planned and how the applicant proposes to fund and deliver them.
- Evidence that school staff will receive focused professional development to implement the school mission and instructional methodologies.
- Provide, if a private school conversion, details about the academic success of that school as well as the rationale for wanting to become a public entity.

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Education Plan:</u></b> <b>Strengths</b>	<b>Page Reference</b>

<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

School Name:

#### **D. Special Education**

An excellent application will have the following characteristics regarding the plan for Serving Students with Special Needs:

- Realistic plan to identify and meet the learning needs of at-risk students, students with disabilities, gifted/talented students, and English language learners
- Timeline, lead contact, and intervention process with specific action steps for meeting learning needs of students with special needs
- Plans for serving special populations align with the overall curriculum, instructional approaches, and the school mission

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Serving Students with Special Needs:</u></b> <b>Strengths</b>	<b>Page Reference</b>

<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

#### **E. Student Conduct and Discipline**

An excellent application will include:

- Policies for addressing expulsion, suspension and education of expelled or suspended students that provide adequately for the safety of students and staff; provide due process for students; serve the best interests of the school's students; and create a positive environment for learning.
- Included in this plan is a description of the process for disciplining students with disabilities.
- A process for parental appeal of disciplinary decisions through a grievance procedure.
- Sample handbooks and policies already discussed by the applicant group.

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Student Conduct and Discipline:</u></b> <b>Strengths</b>	<b>Page Reference</b>

<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

School Name:

## **F. Projected Staff**

An excellent application will include:

- A description of the process that will be used to advertise for, select, and employ school leadership, instructional staff, and other employees.
- An explanation of the relationship that will exist between the charter school and its employees. If partnering with an EMO, a clear description of their role, if any, in the hiring/firing process.
- Qualifications and job descriptions are clearly explained; and should the applicant have already identified individuals for specific positions, resumes are provided for review.
- A plan for the development, mentorship, retention, and regular evaluation of staff that is manageable and is clearly linked to the school's mission and educational program, including a timeline, a lead contact, and specific action steps.
- A collection of employment policies OR clear plan for timely development of such policies that will include staff grievance procedures and employment/dismissal protocols.
- Details on how the charter school will regularly evaluate its instructional and administrative staff.

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Projected Staff:</u></b> <b>Strengths</b>	<b>Page Reference</b>

<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

## **G. Enrollment and Business Plan**

An excellent proposal will present a Business Plan with the following characteristics:

- Budget assumptions and financial planning based on realistic revenue and expenditure projections for five years based on minimum enrollment needed for solvency as well as at 100% enrollment
- Spending priorities that align with the school's mission, curriculum, and plans for management, professional development, and growth
- Maintenance of a small, contingency reserve
- Budget format as prescribed by the application that reveals realistic cash flow projection for the first year of operation including a plan for funding cash flow shortfalls
- Sound financial management systems
- Adequate and reasonable plan to manage start-up costs
- Description of how the school will conduct an annual audit of the financial (including the name and contact information for auditing firm) and programmatic operations
- Details on how the school plans to market itself to ensure equal access by all students
- Results of any surveys or demographic studies performed by the applicant to create this proposal.
- Dates, times, or locations of meetings held to talk about this proposal with members of the public to ascertain the level of public interest in the proposed charter school
- An evaluation of the impact this charter school would have on nearby public schools
- Provided information about how the school proposes to comply with the statute to mirror the diversity of the local education agency after its first year of operation.
- Definitive policies and procedures for recruiting, registering, and admitting students that reflect the racial composition of the school district or targeted school population.

School Name:

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Enrollment and Business Plan:</u></b> <b>Strengths</b>	<b>Page Reference</b>

<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

#### **H. Insurance and Transportation**

An excellent application will provide

- Adequate assurance that the school will meet applicable insurance requirements.
- Statement regarding whether the school plans to provide transportation for its pupils and, if so,
- Clear description of how the school plans to meet the transportation needs of its pupils
- Viable plan specifically addressing transportation needs of low-income and academically low-achieving students that is also reflected in the proposed budget

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Insurance and Transportation:</u></b> <b>Strengths</b>	<b>Page Reference</b>

<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

#### **I. Facilities and Equipment**

An excellent Facility plan will have the following characteristics:

If a facility has been identified --

- Designation of the proposed facility
- Evidence that the facility will be appropriate for the educational program of the school and adequate for the projected student enrollment
- Adequate reflection of the costs associated with the proposed facility in the budget, including rent, utilities, and maintenance
- Assurance that the proposed facility will be in compliance with applicable building codes, health and safety laws, and with the requirements of the Americans with Disabilities Act (ADA)
- A sound plan to identify needed renovations as well as the funds and a timeline for the completion of those renovations
- Contingency plans should this facility not be completed in time for the school to open as planned.

School Name:

If a facility has not yet been identified –

- Description of anticipated facilities needs including evidence that the facility will be appropriate for the educational program of the school and adequate for the projected student enrollment
- Inclusion of costs associated with the anticipated facilities needs in the budget, including rent, utilities, and maintenance
- Evidence to indicate that facilities-related budget assumptions are realistic based on anticipated location, size, etc.
- Assurance that the proposed location will be in compliance with applicable building codes, health and safety laws, and with the requirements of the Americans with Disabilities Act (ADA)
- Plan for finding a location, including a proposed schedule for doing so
- Contingency plans should this facility not be completed in time for the school to open as planned

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Facility and Equipment:</u></b> <b>Strengths</b>	<b>Page Reference</b>

<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

#### **J. Health and Safety Requirements**

An excellent health and safety plan will contain:

- Descriptions of the health and safety procedures that ensure compliance with state and federal laws or requirements such as fire and safety regulations, diabetes care plans, and student immunizations.
- Details concerning the school's crisis plan and dealing with bloodborne pathogens and/or hazardous chemicals.
- Evidence that the school will provide students in grades 9-12 with information on the state's safe surrender laws and how they will notify parents of the availability of various vaccines at the beginning of each year.
- Explanation, if applicable, how the school will comply with food inspections within their cafeteria or food distribution process.

Inadequate	Average	Excellent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b><u>Health and Safety Requirements:</u></b> <b>Strengths</b>	<b>Page Reference</b>

<b>Concerns and Additional Questions</b>	<b>Page Reference</b>

School Name:

### **OVERALL ASSESSMENT**

Would you recommend preliminary approval of this application? Explain your recommendation in the Final Comments section below.

No	Yes
<input type="checkbox"/>	<input type="checkbox"/>

Final Comments	
<b>Educationally</b>	
<b>Organizationally</b>	
<b>Financially</b>	
<b>OVERALL</b>	

School Name: