



**North Carolina State Board of Education Charter
School**

Application Rubric

Applicant: Oak Grove Charter Academy

Reviewers: #1 Robbie Curry, #2 Jonathan Bryant, #3 Ashley Baquero (OCS), #4 Ginger Cash (EC), #5 Susan Walz (EL)

Charter Application Evaluation Rubric

Evaluations and Criteria

The NC charter application review process is designed to ensure that all students in the state have access to a high-quality charter school. Each application will be reviewed by a team of internal and external evaluators, and reviewer comments will be forwarded to the Charter School Advisory Board (CSAB). The CSAB will review applications, conduct interviews of applicants, and make a recommendation to the State Board of Education (SBE), which will then make a final decision to approve or deny the application.

Strong applications will have a clear and compelling mission, a strong educational program, a solid financial plan, effective governance and management structures, and a diverse board of directors with the capacity to execute the plan for the proposed school. In addition to meeting the criteria that are specific to each section, each part of the application should align.

Instructions to Evaluators

Reviewers should complete each rubric section based on the evidence provided in the application. There are five (5) total sections to complete:

- I. Mission, Purposes, and Goals
- II. Education Plan
- III. Governance
- IV. Operations
- V. Financial Plan

Please note that there may be appendices to support information provided in the above sections. When reviewing an application, evaluators should assess the major strengths and areas of concern and provide comments/questions. Reviewers should look for responses that reflect a thorough understanding of key issues and barriers for operating a successful charter school. Responses should clearly align across each section of the application. Each response should include specific and accurate information that shows thorough preparation and understanding of school operations and serving all students. Reviewers should use objective language and complete sentences in their comments on the strengths and concerns/questions of each section of the application. Additional pages should be used as necessary. For example,

Strengths of the academic plan

“The plan aligns with the overall mission and vision because...”

“The chosen curriculum is research based and proven effective with the targeted population of students because...”

Concerns/Questions of the academic plan

“The curriculum and daily schedule do not align with the mission and vision because...” “The discipline plan does not include provisions for students with disabilities.”

Strengths of the governance plan

“The governing board has a diverse skillset and will be able to support the school effectively.”

“The plan to recruit school leaders and teachers is robust and aligns with the mission of the school.”

Concerns/Questions of the governance plan

“The governing board is comprised of only two people who do not have sufficient credentials to support school leadership.”

Strengths of the financial plan

“The financial plan is sound, and the assumptions are consistent with the mission and vision of the proposed school.”

“The budget includes contingencies for high dollar special needs students and funds are allocated in the budget document for such contingencies.”

Concerns/Questions of the financial plan

“The budget includes a line of credit from ABC Bank, but no assurances were provided to support such an agreement.”

“The proposed school assumes two buses in the first year, but there is no accompanying line item in the budget that allocates funds for purchasing buses nor is there any indication of salary and training for bus drivers.”

Complete the summary page for each major section (Mission, Purposes and Goals, Education Plan, Governance, Operations, Financial Plan) after you have completed all of the subsections within the section. Type a summary of your analysis of each section into the box provided; it will expand as needed. This should be a paragraph outlining the overall strengths or concerns/questions of the application section as a whole. It should summarize your findings and not simply be cut and pasted from your subsection analysis.

Please also remember that all documents, including your individual review, will likely at some time be available to the public.

Application Contact Information

Application Contact Information		
Characteristics of a strong response: <ul style="list-style-type: none"> • All questions are adequately addressed and complete • Projected enrollment figures are tactical and realistic for the proposed region • Strong rationale provided for year one enrollment and growth plan 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> • The Oak Grove Academy Charter board has partnered with an experienced Charter Management Organization (CMO), with experience operating and managing more than eighty (80) charter schools serving more than 58,000 students, in nine (9) states. • The proposal identifies that extensive research and engagement was sought before deciding on a partner organization with National Heritage Academies (NHA), specifically, the success of a currently operating school managed by NHA, Wake Forest Charter Academy, was reviewed as a gauge of the organization’s history of success. • The proposal identifies technical assistance was provided by professionals at NHA, however, the board declares it has fully reviewed the submitted application, and stand behind the intended goals articulated in the proposal. 	•
Reviewer #2	<ul style="list-style-type: none"> • Rationale for NHA partnership is explained completely. 	•
Reviewer #3	<ul style="list-style-type: none"> • Applicant clearly explained role of NHA in preparing the application. • Applicant states the vision and mission reflect the thinking of the founding board, not NHA. • Projected enrollment seems realistic for the large county (2.39% of 18/19 ADM at full capacity) but would depend on community interest. 	• 6-7
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • How is THIS charter school unique? How is THIS charter school different than other schools currently operating in the designated area? How does this school directly respond to a need or respond to a specific demographic within the designated area that charter school intends to operate? 	•
Reviewer #2	<ul style="list-style-type: none"> • Not sure that projected enrollment is realistic due to potential saturation in this area. • Interesting that there may be a second application that may mirror some of this application - what is this school and how does the CSAB navigate this? • What are the school options in this area, are the traditional public schools successful? 	<ul style="list-style-type: none"> • 8-9 • 7 • 9

<p>Reviewer #3</p>	<ul style="list-style-type: none"> ● How did the board project enrollment figures and demographics? What research was used to projected demographics? ● Applicant states there are no charter schools within three miles - how many public schools are within ten miles of the proposed charter location? ● Applicant does not give sufficient detail for proposed enrollment figures. 	<ul style="list-style-type: none"> ● 8
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Application Addendum: Proposed Management Organization (EMO or CMO)		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> • The rationale for contracting with an EMO/CMO is evident. • A persuasive explanation that the proposed relationship with the EMO/CMO will further the school’s mission and educational programming. • A clear delineation of the roles, relationships, and responsibilities between the EMO/CMO, the governing board, lead administrator, and public charter school employees. • The rationale includes detailed information regarding the financial and academic performance of other charter schools managed by the EMO/CMO. • A copy of the executed management agreement was included in the application. • Evidence that the management company has the capacity to support the proposed school in finances, academics, and operations. 		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> • OGC has a signed and fully executed CMO agreement, pending authorization, with NHA. • Agreement provides for the continuation of services, and NHA assumes all risk and are responsible for meeting full cost of agreed upon services, even in the event of the school falling short of budget projections, for which NHA will make up the difference, not to exceed cost projections. 	<ul style="list-style-type: none"> •
Reviewer #2	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
Reviewer #3	<ul style="list-style-type: none"> • Clearly explains decision to partner with NHA. • Contract with NHA clearly spells out roles/responsibilities. • No partner board has ever terminated agreement with NHA. • NHA serves diverse student body. • NHA strong financial footing. • CREDO has a strong reputation for ED studies - show NHA schools are successful. 	<ul style="list-style-type: none"> • 18 • Appendix
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • Per the Termination clause of the agreement, OGCs agreement with NHA provides no provision for termination, or remedy, for lack of academic, financial, or organization performance of the school <ul style="list-style-type: none"> o How will the board hold NHA accountable for meeting and exceeding academic performance as compared to the state, the schools the students would have otherwise attended, or those schools within a specified geographical area? o How does the authorizing agency’s performance framework account for this deficiency in the management agreement? 	<ul style="list-style-type: none"> •
Reviewer #2	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •

Reviewer #3	<ul style="list-style-type: none">• Why does the board believe this proposed application will more closely align to Wake Forest Charter's academic success as opposed to the sister school in Durham (RTCA) which has been low performing?	<ul style="list-style-type: none">• P. 15
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Application Addendum: Replication		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> • The application contains a strong rationale for replicating an existing charter school, including evidence that this model will be effective in the proposed setting, and the governing board is a good fit for the proposed charter school. • The rationale includes detailed information regarding the financial and academic performance of the existing charter school model. • The applicant provided all required evidences • If requesting fast-track replication, applicant meets all requirements outlined in SBE policy. 		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> • OGC is partnering with NHA to replicate its model of high performing schools in areas similar to the designated area of the proposed charter school. • The school for which the charter replication is being modeled, Wake Forest Charter Academy, has performance that exceeds the performance of similar schools based on demographics in comparison to state and schools in the identified geographical area. • The proposal plans to serve a student population similar to Research Triangle Charter Academy (RTCA), another NHA-partner school in Durham that opened in 2000. 	<ul style="list-style-type: none"> • 13-14 • 15
Reviewer #2	<ul style="list-style-type: none"> • 	
Reviewer #3	<ul style="list-style-type: none"> • Strong existing charter school to replicate - all academic data provided and meets requirements. Wake Forest outperforms Wake County. • Applicant provides required evidences. 	Appendix
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • The proposal states the RTCA, a NHA managed school, did not meet growth in 2017-18, after meeting growth for the prior two years. <ul style="list-style-type: none"> o How does NHA plan to manage this school differently such that the school meets performance goals set out in the proposal? o The proposal seeks to serve a similarly situated population. The proposal is not clear on how NHA and the governing board plans to do things differently that will ensure the success of the proposed charter school. 	
Reviewer #2	<ul style="list-style-type: none"> • 	
Reviewer #3	<ul style="list-style-type: none"> • Why does the board believe this proposed application will more closely align to Wake Forest Charter’s academic success as opposed to the sister school in Durham (RTCA) which has been low performing? 	P. 15

Section 1.1 Mission and Vision		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● The mission statement defines the purpose of the proposed charter school ● The mission statement is clear, concise, compelling, and measurable. ● The vision provides a clear description of what the school will look like when it is achieving its mission. ● Response includes a compelling description and clear rationale for selecting the location and target student population. ● Completed enrollment summary and anticipated demographics charts with reasonable enrollment projections. ● Response fully justifies the projected student enrollment and the percentage of the ADM when compared to the LEA. ● Substantial evidence is provided to demonstrate educational need. ● Target population aligns with the proposed school mission. 		
Initial Application Review		
	Strengths	Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal identifies the mission of OGC as: Oak Grove Charter Academy exists to prepare students with the academic skills and character traits necessary for success in college, careers, and life. The vision is seeks to create a school for families in and around Gorman that meets the needs of students with a research-based, rigorous academic program and develops students’ personal character through a moral focus curriculum to promote good citizenship. ● The school plans to initially serve students in grades K – 5, growing a grade each year until at full capacity, K – 8. ● Projected enrollment is set at 520 students in year 1, growing to 772 students serving grades K – 8. ● Enrollment projections are supported by demographic data showing that proposed area had a population growth rate of 17.8% between the years of 2010 – 2018. 	<ul style="list-style-type: none"> ● 24 ● 25
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Reasonable enrollment projections provided by applicant. ● Applicant provides research on growth of the Durham-Chapel Hill area. 	<ul style="list-style-type: none"> ● 26
	Concerns/Questions	Page
Reviewer #1	<ul style="list-style-type: none"> ● Are these enrollment projections realistic giving the saturation in the area? ● What impacts will an enrollment this size has on other schools in the area? 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● When looking at Durham Public Schools report cards, there are several “A-C” schools. The application paints a picture of generally failing DPS. ● Even though OGCA will represent a proposed small 	<ul style="list-style-type: none"> ● 25 ● 26

	<p>percentage of DPS, is saturation in Durham County an issue?</p> <ul style="list-style-type: none"> ● From a comparison perspective, there are currently 9 K-8 schools in Durham County - so this is not a completely unusual model. ● The interest survey asks for those interested in a school that promotes college readiness, however this is not a rationale listed as “what makes OGCA different than DPS.” Does the survey really address the need for this type of school? Also would like to see more survey responses. 	
Reviewer #3	<ul style="list-style-type: none"> ● What is compelling and/or innovative about the school’s mission? ● What evidence does the school have that the demographics would mirror the local LEA demographics? ● Character education is standard in many public schools - what makes the vision of this school any different in terms of developing students’ character? ● Target population is unclear. ● Lacks substantial evidence of educational need. ● 46% of 130 surveyed community members being likely to enroll is not a significant amount when school projects 500+ students in year one. 	<ul style="list-style-type: none"> ● 24 ● 24-25

Section 1.2 Purposes of the Proposed Charter School		
Characteristics of a strong response: <ul style="list-style-type: none"> Clearly describes how the proposed charter school will achieve one or more of the six legislative purposes. Identified purpose(s) is/are meaningful, manageable, and focused on improving student outcomes. Purposes are clearly aligned to the proposed mission. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> The OGC seeks to address the six legislative priorities as identified in the charter application. The proposal seeks to provide robust teacher professional development in partnership with its CMO, NHA. This includes teaching coaching, in-service training, and training around data driven instructional planning. The proposal identifies that the board will hold all stakeholders accountable to performance outcomes consistent with the mandates set forth by the state. The proposal believes it responds to the legislative priority of expanding educational choice by providing another option for communities, families, and kids. 	•
Reviewer #2	•	•
Reviewer #3	• Purposes align with mission.	•
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> Re: legislative priority #1: What is the current year over year retention rate for teaches within NHA schools? How does this support the legislative priority the proposed charter school seeks to fulfill? Re: legislative priority #3: it is not clear how this charter school is unique, different, or providing an expanded choice. How does this charter school propose to be different from the other schools currently operating in the designated area, or the area that the facility will be located once finalized? Re: legislative priority #6: the proposed charter school is a replication that does not target a specific population or demographic. Please provide a response on how this model is different or unique? How does this charter school guard against the same factors that have led to poor school performance from schools currently operating with the same demographic of students. 	•
Reviewer #2	• PD language is very general, specifics would benefit this section.	• 28
Reviewer #3	• Professional opps for teachers are not described with	• 28

	<p>enough detail to determine if these would be “new professional opportunities” not currently available in DPS.</p> <ul style="list-style-type: none"> ● For “improved learning” the applicant refers to other NHA schools, but not the closest school to this proposed location RTCA (which hasn’t had as much academic success). ● “Instructional innovation” is not particularly innovative, but practices seen at many schools. 	<ul style="list-style-type: none"> ● 29
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Section 1.3 Goals for the Proposed Charter School		
Characteristics of a strong response: <ul style="list-style-type: none"> ● Performance goals (academic or other) are clear, specific, measurable, attainable, time-specific, and focused on improving student outcomes. ● Clear and compelling process for setting, monitoring, and/or revising goals at least annually. ● Goals are clearly aligned to the mission and purposes. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposed charter school seeks to meet and exceed goals greater than schools in the host district or the state at large. ● Academic performance for students in the upper middle grades will have performance that meets college ready standards. ● The boards governing structure will ensure that the school is meeting its academic, financial, and organizational performance through monthly updates around 4 domain specific questions concerning performance. ● The proposal does not expressly identify quantifiable goals other than saying “Our goals will be similar to the successful goals in place at other schools partnering with NHA both in North Carolina and across the country.” (29 	<ul style="list-style-type: none"> ● 29
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Goals are clear, specific, measurable, attainable, time-specific and focusing on improving student outcomes. 	<ul style="list-style-type: none"> ● 30
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● ● The proposal lacks clarity around specific school performance and what the school believes it can achieve and hold itself accountable. Similar to the concern identified in the management agreement, it is not clear what the CMO will be held accountable to in terms of concrete goals, and there is no mechanism for termination of agreement in the event of low academic performance. <ul style="list-style-type: none"> ○ I recommend seeking a revision of this section to include quantifiable goals that are then incorporated, either expressly or by reference, into the charter management agreement with the CMO. ● The proposal identifies 4 operational goals the board intends to hold the CMO accountable within their management agreement. 	<ul style="list-style-type: none"> ● 29-30
Reviewer #2	<ul style="list-style-type: none"> ● Is Math 1 appropriate for all 8th graders? 	<ul style="list-style-type: none"> ● 30

Reviewer #3	<ul style="list-style-type: none">• Lacks clear and compelling process for setting, monitoring, and revising goals at least annually.	<ul style="list-style-type: none">• 31
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Section 1 Mission, Purposes, and Goals Summary

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

Evaluation Summary for Entire Mission, Purposes, and Goals Section
Initial Application Review
<p>Reviewer #1 Strengths/Concerns/Comments Summary</p> <p>The proposal seeks to create a mission driven school in which students are at the forefront of decision-making and a priorities. While the proposal articulates the desire to meet or exceed performance of similarly situated charter schools, the lack of identified goals in the proposal does not communicate what standards the board and CMO are being held accountable, and should be addressed with all due urgency prior to any decision on the charter application.</p>
<p>Reviewer #2 Strengths/Concerns/Comments Summary</p>
<p>Reviewer #3 Strengths/Concerns/Comments Summary</p> <p>While the mission and purposes described in the application are clear, they are not compelling or innovative. Enrollment projections appear reasonable given the growth of the area. NHA demonstrates many successes, but the closest NHA school to the proposed charter is not as high-performing as other NHA schools in NC. What will push this school to be more like the successful examples as opposed to the K-8 NHA school in the same county? Goals are clearly described, but could use more detail regarding the monitoring and revising of goals once the school is in operation.</p>

Section 2.1 Instructional Program		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● A clear and comprehensive explanation of the school’s academic focus that is aligned with the school’s mission and vision. ● A clear and coherent description of the instructional program and instructional methods are provided. ● The proposed assessment strategies align with the proposed instructional program. ● Includes documented evidence that the proposed approach will lead to improved student performance for the school’s target student population. ● Instructional design offers clear and specific details that describe the basic learning environment, class size, and structure. ● Curriculum framework and sample course scope and sequence are clearly presented and specific to the school’s purpose, aligned with the school’s mission, concentrated to support the target student population, and compatible with the North Carolina Accountability Model. ● School calendar and student schedules meet NC requirements of 185 school days or 1025 hours or instruction. ● Calendar and schedule support implementation of the academic plan and align with stated mission and vision. ● Description of a typical day for teachers and students align with key priorities of the academic plan and the overall mission and vision of the school. 		
Initial Application Review		
	Strengths	Page
Reviewer #1	<ul style="list-style-type: none"> ● OGC will adopt NHA “scripted” or “common” curriculum that is aligned to North Carolina’s state standards. Data driven instruction will allow the school to engage in a continuous system of improvement to ensure student’s academic needs are constantly being assessed and met. ● The proposal intend for OGC to provide an instructional program that is data-driven, research-based, and aligned to all state standards in order to prepare students for high school and college. ● The proposal states: “will ensure that our instructional program is furthering the legislative purposes of charter schools at all times.” (32) ● The proposal will adopt a “school wide” and “classroom wide” framework to ensure it is meeting its academic outcomes. ● The foundation of the instructional framework are: <ul style="list-style-type: none"> ○ Instructional rigor ○ Cognitive Engagement ○ Use of Time ○ Personalized Learning 	<ul style="list-style-type: none"> ● 32 - 33
Reviewer #2	<ul style="list-style-type: none"> ● This section is very comprehensive. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Clear and comprehensive description of instructional program. 	<ul style="list-style-type: none"> ● 32-40 ● Appendix

	<ul style="list-style-type: none"> ● Instructional strategies are clear and comprehensive. ● Interventions and personalized instruction described in instructional program. ● Sample lesson plans and scope/sequences are thorough and aligned to standards. ● Calendar meets NC requirements with 1110 hours. ● Good amount of time dedicated to reading and math classes. ● 18 days dedicated to PD. 	
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● Kindergarten and other grade levels class sizes are higher than traditional public schools - how will this impact interest in the school and retention of students/families? 	<ul style="list-style-type: none"> ● 35
Reviewer #3	<ul style="list-style-type: none"> ● Will K classes have TAs? ● What are the qualifications of the grade level deans who coach other teachers? 	<ul style="list-style-type: none"> ● 35

Section 2.2 Special Populations and “At-Risk” Students		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● An identified founding board member or school administrator with experience working with special populations. ● A clear process for identifying “at-risk” students, English Learner students, and intellectually gifted students. ● A realistic plan for hiring licensed and highly qualified personnel including service providers, nursing, and educational assistants. ● Articulated plan for how the school will utilize and evaluate data to inform instruction and evaluate academic progress for “at-risk” students, English learners, and intellectually gifted students. ● A sound, compelling plan is evident to enhance the academic opportunities to meet the needs of “at-risk” students, EL students, and intellectually gifted students. 		
Initial Application Review		
	Strengths	Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal identifies a comprehensive process that ensures students who need intervention are identified, served, and monitored. ● The proposal identifies goal of meeting the North Carolina’s Read to Achieve priority, to be fulfilled through the following six practices: <ul style="list-style-type: none"> ○ Schedule Intentionally ○ Create collaborative teams ○ Allocate resources appropriately ○ Develop intervention plans ○ Monitor progress ○ Provide professional development ● The proposal applies a systematic approach to responding to student intervention with a research-based approach of tiered interventions. ● The plan anticipates supporting a wide range of students considered at risk including students with identified disabilities and English language learners. ● We will implement an effective, research-based approach to accelerating English language acquisition for EL students that includes Sheltered English Immersion (SEI) in the general classroom, as well as specific language acquisition instruction called English Language Development (ELD). 	<ul style="list-style-type: none"> ● 41 ● 42
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Identification and interventions to meet the needs of students are clearly described. ● NHA has experience and processes established to meet needs of special populations. ● EL identification and instructional program comprehensive. 	<ul style="list-style-type: none"> ● 41-42 ● 44-46

	<ul style="list-style-type: none"> • 	
Reviewer #4	<ul style="list-style-type: none"> • Plan included specific types of assessments that teams will use in identifying which students are at-risk & monitoring their progress • Stated interventions will be matched based on student need & severity of deficits • Included statement on verification of license when hiring EC teachers & service providers 	<ul style="list-style-type: none"> •
Review #5	<ul style="list-style-type: none"> • Plan properly reflects identification through Home Language Survey • Plan recognizes the importance of training all content teachers. 	<ul style="list-style-type: none"> • 37
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • Current and practice on interventions has moved away from a simple tiered approach of intervention to multi-tiered systems of supports (MTSS). <ul style="list-style-type: none"> o How does this proposal integrate and incorporate current research on MTSS? o What's the school plan on training staff on implementing the latest research and best practice on MTSS? • What professional development is the school prepared to provide teaches and staff on current best practice concerning MTSS? 	<ul style="list-style-type: none"> •
Reviewer #2	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
Reviewer #3	<ul style="list-style-type: none"> • How will parents be informed of the intervention process/steps? What happens if a parent has concerns and wants to bypass a step and go straight to EC evaluation? 	<ul style="list-style-type: none"> • 41
Reviewer #4	<ul style="list-style-type: none"> • How will the assessments be used to determine effectiveness of instruction for all students? What data decision rules will be applied to determine students are at-risk? • You state "If Tier III interventions do not succeed, the EC team will meet with student's parents and may recommend an EC referral meeting."--What happens if someone suspects a disability prior to the receipt of Tier III interventions? 	<ul style="list-style-type: none"> • 41-42
Review #5	<ul style="list-style-type: none"> • Plan states "After a scholar has been identified under The Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act of 1973 (Section 504) CSA will employ specific instructional programs, practices, and strategies to ensure academic success and equitable access to the core academic program for EL scholars as follows:" Neither IDEA nor 504 are guidance for EL identification or instructional plans. Please consider citing ESEA and/or ESSA guidance law. See: 	<ul style="list-style-type: none"> • 37 • 38

	<p>https://sites.google.com/dpi.nc.gov/ncels/el-data/el-identification</p> <ul style="list-style-type: none">● Even if you do not expect any English Learners (ELs) to enroll in year one, an EL may enroll at any time. In order to plan ahead for serving ELs, we recommend developing the school's Language Instruction Educational Plan (LIEP). The LIEP is required as part of the Charter Performance Framework. See A5 -EL component. See:https://sites.google.com/dpi.nc.● Parent communication plan should be considered in application.	
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Section 2.3 Exceptional Children		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● A clear process for identifying students with disabilities. ● A viable plan to provide students with special needs with instructional programs, practices, and strategies that ensure access to the general education program and academic success. ● Requirements and processes for monitoring services to students in need and plans to exit students that attain sufficient progress. ● An understanding of, and capacity to fulfill, State and federal obligations and requirements pertaining to students with disabilities. ● A realistic plan for hiring licensed and highly qualified personnel including service providers, nursing, and educational assistants. ● Evidence of adequate resources and staff to meet the needs of all students, including professional development for teachers. ● Articulated plan for how the school will utilize and evaluate data to inform instruction and evaluate academic progress for students with disabilities. 		
Initial Application Review		
	Strengths	Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal provides a sufficient response that indicates the school understands its obligations under federal, state, and other applicable laws related to students with identified disabilities including, but not limited to, its obligation to engage in the Child Find process under federal law. ● The proposal has identified a procedural safeguard through its application of Child Find to ensure: <ul style="list-style-type: none"> ○ Student identification ○ Avoiding misidentification ○ Evaluations and assessments ● The proposal identifies that it is prepared to provide the necessary continuum of services to be able to serve all student. ● The proposal states that it“ will provide appropriate services and specially designed instruction for students with Individualized Education Plans (IEPs) and 504 plans, which will allow access to, and promote progress in, the general education curriculum. We will serve all children according to their individual academic, functional, and social and emotional needs, providing a free and appropriate public education (FAPE) in the least restrictive environment (LRE) in accordance with state and federal requirements. We anticipate serving students with mild, moderate, and severe disabilities and will assign a dean to oversee all EC programming.” (50) 	<ul style="list-style-type: none"> ● 47 -48 ● 50
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● EC program described in detail and aligned with state/federal requirements. 	<ul style="list-style-type: none"> ● 46-52

	<ul style="list-style-type: none"> • Three EC teachers/three paraprofessionals planned for first year. 	
Reviewer #4	<ul style="list-style-type: none"> • Aware of federal/state guidelines regarding Child Find, Evaluation, & Eligibility • Weekly verification of services provided per IEP • Included statement on verification of license when hiring EC teachers & service providers • Prepared to provide the full continuum of services and hire additional staff based on students' needs at enrollment • Established a plan for reviewing records to ensure compliance • Articulated a plan for monitoring the progress of students with disabilities and evaluating the data to ensure accelerated progress • Stated a process of sharing IEP information with general education teachers and documentation of accommodations provided • PD will be provided to staff on effective teaching practices for students with disabilities 	<ul style="list-style-type: none"> • 48-52
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
Reviewer #2	<ul style="list-style-type: none"> • Assume that ECATS will be used, although it is not referenced? 	<ul style="list-style-type: none"> •
Reviewer #3	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
Reviewer #4	<ul style="list-style-type: none"> • Plan states that school will secure the records for students with disabilities--How will school maintain confidentiality of the records? How will staff be informed of this process/procedure to maintain confidentiality? 	<ul style="list-style-type: none"> • 50

Section 2.4 Student Performance Standards		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● Academic achievement goals are rigorous, measurable, and realistic and set high standards and expectations for student learning. ● Academic goals contribute to the stated mission and vision of the school. ● Clear and compelling process for setting, monitoring, and/or revising academic achievement goals. ● Assessment selection will provide sufficiently rich data for evaluation of the academic program and align with state standards. ● Assessment plan details the collection and analysis of individual students, student cohorts, and school level performance throughout the school year, at the end of the academic year, and for the term of the charter. ● A process for using data to support instruction is clearly articulated, with detailed plans to provide adequate training for teachers and school leaders. ● Evidence of clear, rigorous promotion/retention and exit policies and standards. ● Student attendance goals are realistic and plans to ensure high rates of student attendance and address chronic absenteeism are clearly outlined. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal identifies both academic and operational goals it will use to measure its progress and performance as a school. ● The proposal seeks to mimic the performance goals that are currently being used across other NHA schools in North Carolina. ● As required by NC state law, it will administer the annual state wide assessment to 8th grade students as another indicator of its performance. ● Academic goals will be made in comparison to neighboring districts, states, and schools across the country. 	<ul style="list-style-type: none"> ● 52 ● 53
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● A variety of assessment tools are described in the application. 	<ul style="list-style-type: none"> ●
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal identifies a cycle of continuous improvement through the use of a suite of data assessments. However, the proposal lacks specificity around specifically what assessments will used and the benchmarks to assess and measure progress. 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● What “national assessment of college readiness” will be given to 8th graders? 	<ul style="list-style-type: none"> ● 53
Reviewer #3	<ul style="list-style-type: none"> ● What type of formative assessments will be used? Formative assessments are usually utilized more than “multiple times per year” ● What type of interim assessments will be used? NC 	<ul style="list-style-type: none"> ● 53

	<p>Check-ins? NHA created assessments?</p> <ul style="list-style-type: none">● Will teachers be trained to analyze and act on student data? How?● How will possible retention be communicated to parents? Will there be an appeal process for retained students?	
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Section 2.5 School Culture and Discipline		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● A clear vision for school culture or ethos that will promote a positive academic environment and will reflect high levels of academic expectation and support. ● Coherent plan for creating and sustaining the intended culture for students, teachers, administrators, and parents from the school’s inception, and for integrating new students and families as they arrive. ● Plan for how school culture will embrace students with special needs. ● Student discipline plan that provides for effective strategies to support a safe, orderly school climate and strong school culture while respecting student rights. ● Evidence of a legally sound school discipline plan that outlines discipline procedures, suspension and expulsion procedures, and appeals processes. ● Thoughtful consideration of how the discipline policies protect the rights of students with disabilities. 		
Initial Application Review		
Strengths		Page
Reviewer #1	●	●
Reviewer #2	<ul style="list-style-type: none"> ● The proposal intends to use the research based positive behavior interventions and supports model (PBIS) to drive and improve its positive school climate and culture. ● The proposal intends to use a school wide behavior management system to teach and reinforce expected behavior as identified in the school’s code of conduct. 	● 55
Reviewer #3	<ul style="list-style-type: none"> ● Use of Behave with Care and Positive Behavioral Interventions and Support Model. 	● 56
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● ● The school wide behavior management system does not seem to differentiate between early elementary (K-2), upper elementary (3 – 5) and middle school/grades (6 – 8). ● While the proposal intends to institute a school wide plan, it does not differentiate based on the developmental needs of students across it K-8 continuum. ● The support provided to teachers around PBIS seems passive through the 30-mini course packet as provided through Positive Behavior Replacement Plan (PBRP). <ul style="list-style-type: none"> ○ Who at the school will be the lead trainer and in-role developer around PBIS? ○ How will these courses be monitored for completion across the teacher cohort? 	●
Reviewer #2	<ul style="list-style-type: none"> ● Some explanation of teacher PD, however more detail could benefit the application. ● Overall this section lacks specifics. 	● 56-57
Reviewer #3	<ul style="list-style-type: none"> ● Little detail throughout this section. Not clear on the culture the school is striving for. How will the school 	●

	ensure staff, students, and families are aligned in regards to behavior expectations and consequences?	
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Section 2 Education Plan Summary

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

Evaluation Summary for Entire Education Plan
Initial Application Review
<p>Reviewer #1 Strengths/Concerns/Comments Summary</p> <p>The education plan is standards aligned and uses frequent assessments to monitor progress toward goals. The plan anticipates servicing students considered “at-risk” and students with identified disabilities, for which the educational plan anticipates appropriate changes and provisions to meet the diverse needs of student body. The proposal should be further developed to address recent research and best practices around MTSS and ensure the school wide behavior plans are developmentally appropriate and appropriately match the grade bands in which the systems will be used.</p>
<p>Reviewer #2 Strengths/Concerns/Comments Summary</p>
<p>Reviewer #3 Strengths/Concerns/Comments Summary</p> <p>In general, the instructional program outlined in the application is thorough and aligned to the mission. Applicant understands the needs of students including special populations. Applicant could elaborate on the student performance standards and school culture components.</p>

Section 3.1 School Governing Body/Section 3.2 Governance		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● Evidence the proposed board members will contribute the wide range of knowledge, skills, and commitment needed to oversee a successful charter school, including but not limited to educational, financial, legal, and community experience and expertise. ● Strong understanding of the roles and responsibilities of a governing board, including structure, size, powers, duties, and expertise that aligns with the school’s mission and vision. ● Proposed structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and finances. ● Clear, appropriate plans for the board to evaluate the success of the school and school leader. ● Documentation of a clear structure of the governing board is outlined in an organization chart. ● Section includes description of selection and removal procedures, term limits, meeting schedules, and powers and duties of board members, including a conflict of interest policy. ● Plans for meaningful board training. ● Clear, compelling plans to ensure parents have access to the governing board, including a grievance policy that is fair, transparent, and a plan for communicating the process. ● Sound plan and timeline for board recruitment, expansion, and orientation of new members. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposed charter school is an approved non-profit agency appropriately registered with the state of North Carolina with the appropriate non-profit status, registered agent, and federal tax ID number. ● The board represents a range of knowledge and expertise, including member serving on boards of schools currently operated by NHA. 	<ul style="list-style-type: none"> ● 57
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Some board members have prior experience with NHA. ● Roles/responsibilities of board/NHA clearly laid out. ● Although board members don’t live in Durham County, appears they have experience in the community. ● Board chair has charter board experience. ● Appears one board member has both ed experience and charter board experience. 	<ul style="list-style-type: none"> ● 60 ● Appendix - resumes
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● No BOD member has educational administration or teaching experience. ● Robert Fountain - mis. Non support of child? ● What is meant by the “familial dynamics of two members?” 	<ul style="list-style-type: none"> ● ● ● 62
Reviewer #3	<ul style="list-style-type: none"> ● Why is this board passionate about opening a charter in Durham? No member resides in Durham. 	<ul style="list-style-type: none"> ● 58

Section 3.4 Staffing Plans, Hiring, and Management		
Characteristics of a strong response: <ul style="list-style-type: none"> • Compensation packages, system, and strategy that are likely to attract and retain strong staff. • Recruitment and hiring strategy, criteria, timeline, and procedures that are likely to result in a strong staff that are likely to result in a strong staff and are well suited to the school. • Effective planning for unsatisfactory leadership/teacher performance and turnover. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> • The proposal anticipate a multi-pronged approach to recruiting and hiring of staff to ensure the school is fully staffed to meet its projected staffing needs. • The proposal anticipates retaining teachers through its “total rewards” compensation package, which includes an option for merit based pay for high performing teachers. 	<ul style="list-style-type: none"> • 66
Reviewer #2	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
Reviewer #3	<ul style="list-style-type: none"> • Extensive experience in staffing (NHA). • Recruitment and compensation likely to attract strong staff. 	<ul style="list-style-type: none"> • 66 • 69
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • What is the retention rate of teachers across the NHA network? The proposal intends that pay increase will take effect in the 3rd year of success with the school. How does align with local practice for retaining the best teachers? 	<ul style="list-style-type: none"> •
Reviewer #2	<ul style="list-style-type: none"> • Is there any concern with larger (compared to traditional LEAs) class sizes and relatively few TAs? • This section does not appear to address planning for unsatisfactory leadership/teacher performance and turnover. 	<ul style="list-style-type: none"> • 66
Reviewer #3	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •

Section 3.5 Staff Evaluations and Professional Development		
Characteristics of a strong response: <ul style="list-style-type: none"> ● Professional development standards, opportunities, and calendar/scheduling effectively support the education program and are likely to maximize success in improving student achievement. ● Thoughtful plan for professional development in the areas of special education and EL students, including the implementation of IEPs, discipline of students with disabilities, and communication with EL families. ● Detailed evidence that all school staff will receive ongoing focused professional development to effectively implement the school’s mission, instructional methodologies, and education program are included. ● Details in this section align with proposed budget. ● Plan for supporting, developing, and annually evaluating school leadership and teachers that is likely to produce and retain a successful staff. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal indicates that new teachers will be provided a teacher mentor as part of NHA overall approach to teacher development and retention. ● Teachers will be able to have increased compensation based on performance according to an internally developed teacher evaluation tool. 	<ul style="list-style-type: none"> ● 72
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Robust PD plan. 	<ul style="list-style-type: none"> ●
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● Will OGCA use NCEES or another model? 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● How does the NHA “internally developed evaluation tool” compare to NCEES? 	<ul style="list-style-type: none"> ● 72

Section 3.6 Enrollment and Marketing		
Characteristics of a strong response: <ul style="list-style-type: none"> ● Articulated student recruitment and marketing plan, timeline, and enrollment policy that will provide equal access to all interested students and families, including those in poverty, academically low-achieving students, students with disabilities, and English Language Learners. ● Details in the section align with proposed budget. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal indicates to utilize a multi-pronged approach to market to and attract students to meet its enrollment targets consistent with the projections of the proposals. 	<ul style="list-style-type: none"> ● 76
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Marketing plan could use more detail. When will the “array of channels” be used? Is there a specific plan for marketing to prospective families? How will non-English speaking families receive information? ● The expected “over 1,000 applications” does not seem to align with the survey results. 	<ul style="list-style-type: none"> ● 76 ● 78

Section 3.7 Parent and Community Involvement		
Characteristics of a strong response: <ul style="list-style-type: none"> ● Compelling outreach plan that includes community, family, and student involvement, and that is realistic and likely to foster student retention and community support. ● Description of existing community resources and partnerships already formed that will benefit students and parents and that include a description of the nature, purposes, terms, and scope of services of any such partnerships; and evidence of commitment from identified community partners including documentation of pledged support, if available. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal identifies parental partnership as among the four pillars of the OGC charter application. The proposal seeks to utilize a monthly newsletter, school website, and social media to keep interested families informed of the latest events of our school as it gets closer to opening. Social media will be used to help form and maintain connections between school leaders and parents. 	<ul style="list-style-type: none"> ● 79
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● Application mentions sending communication so parents can “become involved in the school,” however application primarily mentions communication from the school to parents and a parent room. Effective parent engagement involves parents being active within the school community - application does not contain specifics for how this will occur. Simply keeping parents informed does not automatically equate to active, engaged parents. 	<ul style="list-style-type: none"> ● 79
Reviewer #3	<ul style="list-style-type: none"> ● Plan lacks detail. ● How will non-English speaking families receive information? 	<ul style="list-style-type: none"> ● 79-80

Section 3.8 Admissions Policy		
Characteristics of a strong response: <ul style="list-style-type: none"> Enrollment policy that complies with NC state law, SBE policy, and the Charter Agreement. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> The proposal seeks to ensure all students and have equal and equitable access to attend OGC. The proposal identifies the following strategies to meet the goals of its admission’s policy: an open enrollment period and a lottery in cases where demand exceeds spaces available. The proposal identifies a number of preferences within the admission’s policy, specifically, students who would like to reenroll in successive year; children of board members and full time employees will be granted preference within the admission’s policy; siblings of currently enrolled students will always be granted preference in the admission’s policy. 	<ul style="list-style-type: none"> 81
Reviewer #2	<ul style="list-style-type: none"> 	<ul style="list-style-type: none">
Reviewer #3	<ul style="list-style-type: none"> Policy in compliance with law/policy. 	<ul style="list-style-type: none">
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> Does the preferences extended to a Board members and full-time employes comply with applicable state and municipal law concerning open and equal access? This may not be an issue but would be investigated to ensure compliance with applicable laws. 	<ul style="list-style-type: none">
Reviewer #2	<ul style="list-style-type: none"> May need to clarify some preferences and processes in policy. 	<ul style="list-style-type: none">
Reviewer #3	<ul style="list-style-type: none"> Policy that board develops for stakeholders will need more detail. 	<ul style="list-style-type: none">

Section 3.8b Weighted Lottery (If Applicable)

Characteristics of a strong response:

- The applicant outlines a weighted lottery process that does not illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.
- The weighted lottery process is not based on geographic boundaries, such as zip code or current public school zones.
- The weighted lottery or limited lottery process is unique to the school’s unique mission and provides a thorough explanation of why the school is choosing to use the process.
- Applicant provides a thorough description of the processes and procedures it intends to use to implement the lottery.
- Applicant provides underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.

Initial Application Review

Strengths		Page
Reviewer #1	●	●
Reviewer #2	●	●
Reviewer #3	●	●
Concerns/Questions		Page
Reviewer #1	●	●
Reviewer #2	●	●
Reviewer #3	●	●

Section 3 Governance and Capacity Summary

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

Evaluation Summary for Entire Governance and Capacity Plan
Initial Application Review
<p>Reviewer #1 Strengths/Concerns/Comments Summary</p> <p>The proposal provides a sufficient governing structure to adequately provide governing and oversight over the school’s daily operations and accountability to the charter management organization. The proposal’s recruitment plan, both of staff and students, provides sufficient detail to meet its enrollment and staffing projections, with the CMO assuming risk to cover all operation costs in the event of not meeting projections, not to exceed the projections in the proposal.</p>
<p>Reviewer #2 Strengths/Concerns/Comments Summary</p>
<p>Reviewer #3 Strengths/Concerns/Comments Summary</p> <p>Board has strengths in that some members have charter and/or ed experience. However, unclear as to why the board wants to serve this community - no Durham County residents. Board appears to understand governance responsibilities. Marketing and parent engagement pieces need more thought and detail.</p>

Section 4.1 Transportation Plan		
Characteristics of a strong response: <ul style="list-style-type: none"> ● Clear description of a transportation plan that supports daily transportation, extracurricular activities, field trips, etc. ● A comprehensive oversight plan that identifies school staff responsible for this oversight. ● Description of how the school will arrange transportation for special needs students where necessary ● Demonstrated familiarity with state and federal regulations relating to provision of transportation services to students. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The OGC proposal seeks to ensure that the school is accessible to all students and that transportation needs are not a barrier to any child attending the school. ● The proposal does not plan to provide bus transportation to the general student population. However the proposal identifies options will offer parents and guardians resources and support to coordinate their transportation needs, and, as required by federal and state law, will provide transportation as required by any individual student’s IEP, 504 plan, status as a student experiencing homelessness, or other applicable law. 	<ul style="list-style-type: none"> ● 84
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #4	<ul style="list-style-type: none"> ● Statement that school will provide transportation if stated in a student’s IEP 	<ul style="list-style-type: none"> ● 84
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● “Support and resources” for transportation is very general. Unclear how OGCA is removing transportation barriers for students. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Unclear how OGCA is removing transportation barriers for students. Does the applicant have data to suggest most interested families would not have transportation barriers? 	<ul style="list-style-type: none"> ●
Reviewer #4	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●

Section 4.2 School Lunch Plan		
Characteristics of a strong response: <ul style="list-style-type: none"> ● A clear description of how the school will offer food service to all students, adhering to all nutritional guidelines. ● A plan to collect free and reduced-price lunch information, including procedures to receive reimbursement. ● Adequate funds allocated for school nutrition, aligned with the target student population. ● A plan to ensure compliance with applicable state and federal regulations. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal identifies a meal plan that ensures each student who wants or needs a meal during the school day will receive one. ● The proposal identifies a daily procedural protocol to identify the number of students who will require food during the school day for which the school will be able to respond accordingly. ● The proposal identifies tht NHA will contract with a food-service provider to operate the schools food program, following U.S. Department of Agriculture (USDA) procurement requirements and complying with Federal Regulation 7 CFR 210.16 and other applicable law. ● A hot meal for lunch will be offered daily, and a cold breakfast will be offered if needed. ● Students will pay a set price for school meals unless students qualify for free or reduced price meals under the National School Lunch Program. 	<ul style="list-style-type: none"> ● 85
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● NHA experience w/National School Lunch Program 	<ul style="list-style-type: none"> ● 85
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● This section is fairly general - could include more specifics. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Lacks details regarding how families and the school will communicate lunch needs/services. 	<ul style="list-style-type: none"> ●

Section 4.3 Civil Liability and Insurance		
Characteristics of a strong response: <ul style="list-style-type: none"> ● Plan to secure comprehensive and adequate insurance coverage, including worker’s compensation, liability, property, indemnity, directors and officers, automobile, crime, errors and omissions, and any other required coverage. ● Insurance quote provided aligns with budget assumptions. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal identifies sufficient and appropriate liability assurance as required under federal, state, and other applicable laws. ● The proposal shall name SBE as an “additional” insured to ensure proper liability is extended to the authorizing body and its designated agents. 	<ul style="list-style-type: none"> ● 86
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●

Section 4.4b Start-Up Plan		
Characteristics of a strong response: <ul style="list-style-type: none"> ● Compelling plan for leading the development of the school from post-approval to opening, including identification of a capable individual or team to lead the planning and start-up. ● Adequately addresses potential challenges ● Detailed start-up plan specifying tasks and timelines (which are aligned with a sound start-up budget, if applicable) 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposals state up plan is sufficient that if approved accounts for the necessary processes and protocols to ensure a smooth opening of the school. ● The board will hold monthly, public meetings to openly discuss its start up operations, and ensure sufficient community engagement in the “Ready To Open” process. 	<ul style="list-style-type: none"> ● 87
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● NHA experience and capital funding. 	<ul style="list-style-type: none"> ● 87
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●

Section 4.5 Facility		
Characteristics of a strong response: <ul style="list-style-type: none"> • Facility plans are reasonable and adequately meet the requirements of the educational program and anticipated student population. • A sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> • The proposal has not identified a viable facility for this proposed charter school. • The proposal sets forth two options for the facility as either new construction and or renovation of a standing facility. 	<ul style="list-style-type: none"> • 88
Reviewer #2	<ul style="list-style-type: none"> • Beyond a specific address for a site, this section is fairly comprehensive. 	<ul style="list-style-type: none"> •
Reviewer #3	<ul style="list-style-type: none"> • Thorough timeline and plan. 	<ul style="list-style-type: none"> • 89
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • How will the board management construction costs associated with a new construction or renovation? • How much of total school renew will be used to reimburse NHA for construction cost in the near and short term? 	<ul style="list-style-type: none"> •
Reviewer #2	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
Reviewer #3	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •

Section 4 Operations Plan Summary

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

Evaluation Summary for Entire Operations Plan
Initial Application Review
<p>Strengths:</p> <p>Reviewer #1: The operation plan is sufficient and NHA has a record of opening schools on time against an aggressive schedule.</p>
<p>Concerns/Questions:</p> <p>Reviewer #1:</p> <p>Not having a viable facility is cause for concern. How does the budget anticipate costs associated with construction or renovation?</p> <p>How much public revenue will be reimbursed to NHA for covering construction cost of a new facility or renovation?</p> <p>Reviewer #3 Strengths/Concerns/Comments Summary</p> <p>Application needs elaboration in terms of meeting transportation and meal needs of all students. Also needs more detail on marketing and family engagement plans. Application is strong in terms of start up and facility plans.</p>

Section 5.1 Charter School Budget		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● Applicant has identified one or more LEA(s) and outlined a realistic revenue projection (state, local, federal) over the next five years. ● The enrollment projection aligns with the Total Student Enrollment projections located in Section 1 of the application. ● Applicant has provided assurances of identified “other funds” or “working capital.” ● Applicant provides a realistic budgetary projection in regard to personnel. ● Budget worksheet contains assumptions and reasonable budget numbers that reflect rent, utilities, maintenance, insurance, and build-out costs. ● Detailed budget assumptions that include the impact of the anticipated number of students who receive free or reduced-price lunches. ● Complete, realistic, and viable five-year operating budget ● Applicant has provided a realistic assessment of projected source of revenue and expenses that ensure the financial viability of the proposed school. ● The projection is consistent and aligns with all proposed sections of the application. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> ● The proposal anticipates the vast majority of revenue to be generated through a per-pupil funding formula. ● The school plans to enroll 520 students in year one (K-5) adding a grade each year there after until at full capacity of 772 students. ● Projected revenue: <ul style="list-style-type: none"> ○ Year 1: \$6,056,131 ○ Year 2: \$6,484,602 ○ Year 3: \$6,959,892 ○ Year 4: \$7,813,873 ○ Year 5: \$7,819,493 	●
Reviewer #2	●	●
Reviewer #3	<ul style="list-style-type: none"> ● Teacher/leader salaries appear to be competitive. ● Positions align with other sections of application. ● 	●
Reviewer #4	<ul style="list-style-type: none"> ● Assurance that they will provide whatever is needed to meet the unique needs of a student with a disability, and statement that they have additional funding outside of federal and state allotments to cover this need 	● 95
Concerns/Questions		Page
Reviewer #1	●	●
Reviewer #2	<ul style="list-style-type: none"> ● Not sure that student population is realistic, even though application mentions that viability is not dependant on population. 	●
Reviewer #3	<ul style="list-style-type: none"> ● Concerns about projected enrollment figures. ● Concerns about ability to find part time positions. ● What is included in the marketing expenses (185k) and tech services (122k)? 	●

	<ul style="list-style-type: none"> • What is the interventionist position specifically? What qualifications? Salary is low. 	
Reviewer #4	<ul style="list-style-type: none"> • Who will be assigned to complete grant application specific to students with disabilities? What resources/process will they use to maintain compliance and reporting related to funds received? 	<ul style="list-style-type: none"> • 95

Section 5.2 Budget Narrative		
Characteristics of a strong response: <ul style="list-style-type: none"> ● Sound contingency plan to meet financial needs if anticipated revenues are lower than expected. ● Individual and collective qualifications for implementing the financial plan successfully, including capacity in areas such as financial management, fundraising and development, and accounting. ● Detailed budget narrative that clearly explains reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions, identification of the amounts and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated and including evidence of firm commitments where applicable). 		
Initial Application Review		
Strengths		Page
Reviewer #1	●	●
Reviewer #2	●	●
Reviewer #3	● Large contribution from NHA in year 1 and year 2.	● 94
Concerns/Questions		Page
Reviewer #1	●	●
Reviewer #2	<ul style="list-style-type: none"> ● I do not see the details on the NHA contributions for the initial years in the agreement, however I could have missed this. ● Any concern that finding a .8 social worker or .75 recess aid will be challenging? ● Budget shows Interventionists making just over \$20K/year, what kind of background/experience/qualifications will these individuals have? ● State Health Plan cost is under \$7K/employee currently, appears to be over budgeted. ● \$185K/year for marketing? Seems very high. ● Not sure if iReady, chromebooks and MAP/NWEA are included in Tech Services - these are expensive items. ● Since busing is not offered, application states that field trips would be contracted transportation. Field trips reflect only \$3K, not sure if this includes transportation. 	●
Reviewer #3	●	●

Section 5.3 Financial Compliance		
Characteristics of a strong response: <ul style="list-style-type: none"> Detailed financial procedures, policy, or other reasonable assurance that the proposed school will have sound systems and processes in place for accounting, payroll, and independent annual school level financial and administrative audits. 		
Initial Application Review		
Strengths		Page
Reviewer #1	•	•
Reviewer #2	•	•
Reviewer #3	<ul style="list-style-type: none"> NHA experience Audit firms being considered 	•
Concerns/Questions		Page
Reviewer #1	•	•
Reviewer #2	•	•
Reviewer #3	•	•

Section 5 Financial Plan Summary

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

Evaluation Summary for Entire Financial Plan
Initial Application Review
Reviewer #1 Strengths/Concerns/Comments Summary
Reviewer #2 Strengths/Concerns/Comments Summary
Reviewer #3 Strengths/Concerns/Comments Summary Budget aligns with application and mission. Teacher/leader salaries seem appropriate for the location. Some concerns about ability of the board to find part time positions and interventionists at stated salaries. Need more clarity on some large expenses such as marketing and tech services. Not sure projected enrollment is realistic - need more survey/community input to determine.