[COVER PAGE]

Notes:

* Applicants are not required to use this template for their Narrative Proposals, but it is highly recommended to ensure formatting specifications are met.
* This page should be deleted or replaced with a cover page. A cover page will not count toward the 100-page limit.
* **Bracketed and highlighted text is placeholder and/or instructional text that should be deleted or replaced.**
* The Narrative Proposal may contain a table of contents and/or a bibliography/references section without penalty toward the maximum page limit.
* The structure of the Narrative Proposal must include each application requirement and criterion followed by the respective narrative response. Each application requirement and criterion must be typed exactly as it appears in this document. Each major section (*e.g.*, School Overview, Academic Plan, etc.) must begin on a separate page. This template provides the correct structure.
* The Narrative Proposal must be typed with 1-inch page margins and 12-point font, single-spaced, unless otherwise specified. Graphs, tables, charts, and other illustrative tools may be used within the body of the response.
* Every page of the Narrative Proposal must have a page number and the full name of the proposed school.
* If a particular requirement does not apply to your proposed school or plan, simply respond “Not Applicable,” **and** state the reason this requirement is not applicable to the proposed school or plan.
* Review all sections of your Narrative Proposal for completeness before submitting. Late, incomplete, or incorrectly formatted submissions will not be accepted.

Tips:

* Appropriately cross-referencing sections and page numbers can build overall plan cohesiveness, alleviate the need to repeatedly describe certain concepts and ideas, and prevent evaluators from missing important details. Appropriately referencing attachments can also add clarity.
* While describing key ideas is important, be specific, especially in describing **how** each element of the plan will be implemented.
* Avoid rhetoric, hyperbole, and “fluff.”

[A Table of Contents is not required, but it may be included without counting toward the Narrative Proposal page limits. This Table of Contents is auto-generated and can be updated simply by right-clicking on the table and selecting “Update Field.”]

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1. School Overview

**[Note: The School Overview section must not exceed five (5) pages.]**

## Executive Summary

1. Mission. A mission describes the fundamental purpose of the school. The proposed school’s mission statement should:
   1. Describe the core school design components, what the proposed school will accomplish in concrete terms, and what methods it will use;
   2. Be attainable and consistent with high academic standards;
   3. Reflect the key values that teachers, administrators, and students know and support;
   4. Be concise and clearly describe the proposed school’s purpose for the entire school community, external stakeholders, and individuals who may not be familiar with the proposed school; and
   5. Be able to operationalize and guide the work and school culture.

[Narrative response]

1. Vision. The vision statement describes the proposed school’s highest priorities and long-term goals, identifying what will be accomplished when the school is successful in executing its mission over the long term. The vision statement should explain what success looks like in terms of students’ life outcomes and the impact on the community and society. A vision statement is a broad, powerful goal whose scope is bigger than daily activities and should indicate the school’s valued measures of success.

[Narrative response]

1. Geographic Location. Briefly describe the geographic location and, if known, the address of the facility the proposed school plans to use.

[Narrative response]

1. Anticipated Student Population. Briefly describe the anticipated student population, including, the geographic area(s) that the proposed school plans to serve, students’ anticipated educational needs, and the non-academic challenges the proposed school is likely to encounter.

[Narrative response]

1. Community Engagement. Briefly describe how the applicant has assessed demand and/or solicited support for the proposed school. Include a description of any significant relationships or partnerships established to generate community engagement in and support for the proposed school.

[Narrative response]

1. Contribution to Public Education System. Describe any anticipated contribution the proposed school would make to Hawaii’s public education system as a whole, including, if applicable, the Priority Needs identified in Section I.C of the RFP. If the proposed school would address either or both Priority Needs, provide an analysis, with relevant data, about that Priority Need and how the school would help address it. In addition to the Priority Needs, the examples of contributions to the public education system could include things like serving student demographic groups that the existing system has had challenges serving, meeting a particular curricular or instructional need or challenge in a way that has system-wide benefits, and forming partnerships or feeder-school relationships with existing public schools. Where the proposed school would model innovation in ways valuable to the system as a whole, describe any specific plans to disseminate the knowledge gained at the school to other public schools.

[Narrative response]

1. Reason for Conversion (**Conversion applicants only**). Explain the rationale for applying to convert to a charter school.
   1. How will the charter school model lead to improved academic outcomes and non-academic operations?
   2. Describe the stakeholder groups that were engaged in the conversion decision making process, and explain their roles in the transition process.

[Narrative response OR, if the application is not for a Conversion Charter School, state “Not applicable because the proposed school is not a conversion charter school.”]

1. Conversion Transition (**Conversion applicants only**). Explain if and how any programmatic elements of the school design will change or evolve with the transition to operation as a charter school, as opposed to the current school model.

[Narrative response OR, if the application is not for a Conversion Charter School, state “Not applicable because the proposed school is not a conversion charter school.”]

## **Enrollment Summary**

1. Enrollment Plan.Complete the Enrollment Plan (Exhibit 1), and include it as **Attachment A (required form)**, illustrating the proposed school’s five year enrollment plan. Include a breakdown between students receiving a primarily on-site, face-to-face learning experience (brick-and-mortar) or *blended learning* and students receiving a primarily *online learning* experience (*virtual learning*).

[Recommended narrative response: “The Enrollment Plan is provided in **Attachment A**.”]

1. Enrollment Plan Rationale. Describe the rationale for the number of students and grade levels served in each year and the basis for the enrollment plan illustrated in the attachment. Include a discussion of the rationale for including non-entry level grades. Entry level grades are generally kindergarten, sixth grade, and ninth grade.

[Narrative response]

1. Enrollment Plan Justification. Provide evidence justifying the enrollment plan described above. Include the estimated number of students in the geographic area(s) the proposed school plans to serve, including the number of students that currently attend existing schools (both public and private) in the geographic area for the grades the proposed school plans to serve. If research data, censuses, surveys, or other data sources were used, please describe these sources and provide a citation or attach copies of the sources, as **Attachment B (no page limit)**.

[Narrative response]

1. Academic Plan

## Academic Plan Overview, Academic Philosophy, and Student Population

1. Academic Plan Overview. Provide a concise overview of the academic plan of the proposed school, including instructional methods, assessment strategies, and any non-negotiable elements of the proposed school’s academic plan. Include a brief description of any *virtual* or *blended learning programs*, as defined in Section IV.J of the RFP. Briefly describe any evidence that promises success for this academic plan with the anticipated student population.

[Narrative response]

1. Academic Philosophy. Provide a concise description of the applicant’s core beliefs and academic values and how those beliefs and values inform the design of key elements of the proposed school.

[Narrative response]

1. Anticipated Student Population. Describe the anticipated student population the proposed school plans to serve, including, among other things, the projected percentage of students eligible for free and reduced lunch. Explain why the proposed school anticipates that the student population described above will enroll in the proposed school. Include, as **Attachment C (5 page limit)**, a listing of the DOE complex area(s) that these students will most likely come from and a listing of both public and private schools with the grades the proposed school plans to offer that are located in the same areas that the proposed school plans to pull its student population from.

[Narrative response]

## Curriculum and Instructional Design

1. A clear description of course outcomes for each course at each grade level.

[Narrative response]

1. A clear description of the rigorous academic standards that will be used at the proposed school.  The description must include, provided as **Attachment D (no page limit)**, a map or list of each standard that will be addressed in each course at each grade level and demonstrates vertical alignment from grade level to grade level. The description must also include a rationale for inclusion each set of standards that proposed school plans to adopt that demonstrates an understanding of how each set of standards will contribute to the success of student learning under the Academic Plan.

[Narrative response]

1. A description of the materials that have been selected and an explanation that clearly demonstrates how the materials support the Academic Plan. For grade levels and courses that do not have curriculum materials selected, a reasonable and sound timeline and description of how the materials will be developed or selected and a list of individuals that will be involved in the development or selection process. If the proposed Academic Plan includes a *virtual* or *blended learning program*, include a clear description of the online learning curriculum program(s) and a reasonable rationale for the selection of the curriculum program(s).

[Narrative response]

1. A clear list of academic goals and targets and a description of how the proposed school assesses the progress of individual students, student cohorts, and the school as a whole on the identified goals and targets.  The description must clearly explain the how the identified assessments will accurately measure progress toward the identified goals and targets.

[Narrative response]

1. A clear and comprehensive description for how instructional leaders and teachers will use student data to administer, collect, and analyze the results of diagnostic, formative, benchmark/interim, and summative assessments to inform programmatic and instructional planning decisions and make adjustments to curricula, professional development, and other school components.  The description must clearly explain the roles and responsibilities of the instructional leadership team in overseeing teachers’ progress toward helping students meet their identified goals and targets and clearly describe the formalized process and supports that will enable teachers to reflect on student progress and adjust their instruction accordingly.

[Narrative response]

1. A clear description of the instructional strategies that the proposed school will use that adequately explains how these strategies support the mission, vision, and academic philosophy of the proposed school and are well-suited to the anticipated student population. The description must also include the interventions and modifications that will be made to instructional strategies if students are not meeting identified goals and targets. If the proposed school’s Academic Plan contains a *virtual* or *blended learning program*, the description must adequately explain how the proposed instructional strategies will work with the online learning components to result in a coherent instructional program.

[Narrative response]

1. Graduation Requirements.
2. A clear description of the course and credit requirements for graduation, including a description of how GPA will be calculated, that meets BOE’s graduation requirements.
3. If graduation requirements for the proposed school will differ in any way from BOE Policy 4540, an explanation of how they will differ (including exceeding BOE graduation requirements), including compelling reasons and justification for the differences, and a reasonable and sound plan for adjusting graduation requirements (including any necessary adjustments to other components of the Academic Plan) in the event the BOE does not grant a waiver from its policy.

[Narrative response]

1. Virtual and Blended Learning. [If the proposed school does not contain a virtual or blended learning program, delete the following text of these criteria and state “These criteria are not applicable because the proposed school does not contain a virtual or blended learning program.”] If the proposed school’s plan contains a *virtual* or *blended learning program*, as defined in the RFP:
2. A clear overview of any *virtual* or *blended learning program* that is adequate for the anticipated student population and clearly demonstrates that all students receive adequate support, including:
   * 1. A description of the level of instruction that uses *online learning* methods (*e.g.*, unit/lesson, single course, entire curriculum);
     2. A description of the general organization of the *online learning* schedule (*e.g.*, fixed daily schedule, modified schedule, open entry/open exit), including an adequate explanation of how schedules will be modified, if at all, for students that fail to meet learning goals;
     3. For *blended learning programs*, an explanation of whether and how the program enhances or transforms classroom instruction or does both;
     4. A description of the teacher’s role (*e.g.*, teacher leads instruction, teacher supports instruction, no teacher involvement), the student’s role (*e.g.*, teacher driven learning, teacher guided learning, independent learning), and the parent’s role (*e.g.*, are not support required, parent support recommended, no parent involvement) in any *online learning* program;
     5. A description of the degree of support provided to students using any *online learning* program (*e.g.*, little or no support, school based mentoring support, school or home mentoring support); and
     6. A description of the student to teacher ratio in the *online learning* program (*e.g.*, traditional classroom ratio, 2-3 times traditional classroom ratio, instructional helpdesk model).

[Narrative response]

1. A video demonstration, as a URL to a video on a browser-viewable platform (like YouTube), of the proposed *virtual* or *blended learning program* curriculum that clearly portrays the student and teacher experience with the *online learning* curriculum, including both the student and teacher user interfaces.

[Recommended narrative response: “A video demonstration of online learning curriculum can be found at this URL: \_\_\_.”]

1. For *blended learning programs*, a reasonable and sound description of how classroom instruction and the *online learning* components will be seamlessly integrated to result in a coherent instructional program.

[Narrative response OR, if the proposed school only has a virtual learning program, state, “Not applicable because the proposed school does not offer a blended learning program.”]

1. An explanation of how the proposed school will define, monitor, verify, and report student attendance (*e.g.*, seat time, logins), student participation in a full course load, credit accrual, and course completion that provides sufficient evidence that all students will be accounted for and engaged in a complete and rigorous educational program.

[Narrative response]

1. A description of the proposed school’s online attendance policy that adheres to state and federal reporting requirements.

[Narrative response]

1. A sound plan for administering and proctoring mandated assessments, including a reasonable budget that is reflected in the Financial Plan Workbook.

[Narrative response]

1. A reasonable plan to uphold the academic integrity of the *virtual* or *blended learning program* that describes the systems and procedures for validating the authenticity of student work.

[Narrative response]

1. An adequate explanation of measures the proposed school will take to ensure student safety, both technologically and educationally, that are compliant with applicable federal privacy laws (FERPA, CIPPA, and COPPA).

[Narrative response]

1. An adequate explanation of how the proposed model ensures that there are minimal interruptions to learning, should technological challenges arise, including a description of the plan for technical support and troubleshooting for students, teachers, parents or guardians, and administrators.

[Narrative response]

1. A clear description of the platform dependencies for the proposed curricular materials and instructional strategies and an adequate explanation of how the proposed technology selection supports those dependencies. (For example, the proposed curriculum runs a Microsoft Windows-based application, and therefore requires Windows-compatible laptops and tablets rather than iPads.)

[Narrative response]

## Special Populations and At-Risk Students

1. An outline of the overall plan to serve *educationally disadvantaged students* and students with special needs that demonstrates an understanding of, and capacity to fulfill, state and federal obligations and requirements pertaining to *educationally disadvantaged students* and students with special needs, including but not limited to the following subgroups: students with IEPs or Section 504 plans; ELL students; students performing below grade level; students identified as intellectually gifted; homeless students; and students at risk of academic failure or dropping out. The plan must identify any other special needs populations and at-risk subgroups that the proposed school expects to serve, whether through data related to a specifically targeted school or geographic area or more generalized analysis of the population to be served, and describe the evidence or data that was used to determine that the proposed school should anticipate serving the population.

[Narrative response]

1. For **each** of the aforementioned subgroups of students with special needs (and any other subgroups the applicant identifies), a comprehensive and compelling plan or explanation for:
   1. The percentage of the anticipated student population that will likely have special needs and how the evidence or data that was used to make this determination was derived;
   2. The curriculum, daily schedule, staffing plans, instructional strategies, and resources that will be designed to meet the diverse needs of all students;
   3. Methods for appropriate identification of potential students with special needs, how these methods will be funded, and how misidentification will be avoided;
   4. Specific instructional programs, practices, and strategies the proposed school will employ to do things like provide a continuum of services; ensure students’ equitable access to general education curriculum; ensure academic success; and opportunities the proposed school will employ or provide to enhance students’ abilities;
   5. Monitoring, assessing, and evaluating the progress and success of students with special needs, including plans for ensuring each student with special education needs attains IEP goals and for exiting ELL students from ELL services;
   6. For proposed schools that have a high school division, plans for promoting graduation;
   7. Plans to have qualified staff adequate for the anticipated special needs population, especially during the beginning of the first year; and
   8. If the proposed school’s plan contains a *virtual* or *blended learning program*, a clear description of how the virtual component addresses students with special needs, which may include IEP meetings and modifications, as necessary, for transitioning to a fully or partially online learning program.

[Narrative response]

1. A clear illustration of how the proposed curriculum and Academic Plan will accommodate the academic needs of students performing below grade level and a clear description of the supports and instructional strategies beyond special education that will support underperforming students in meeting and exceeding standards.

[Narrative response]

1. A clear description of how the proposed school will identify students who would benefit from accelerated learning opportunities through its assessment of students’ needs, a clear illustration of how the proposed curriculum will accommodate those performing above grade level, and a comprehensive description of the supports and instructional strategies that will ensure these students are challenged and able to access the level of rigor that aligns with students’ individualized needs.

[Narrative response]

## School Culture

1. A clear and coherent description of the shared beliefs, attitudes, traditions, and behaviors of the proposed school community, and a detailed plan describing how these shared beliefs, attitudes, customs, and behaviors will be developed and implemented and create a school culture that will promote high expectations and a positive academic and social environment that fosters intellectual, social, and emotional development for all students.

[Narrative response]

1. A sound plan for developing a proposed school culture that is conducive to a safe learning environment for all students and how the proposed school will adequately identify, assess, monitor, and address the social, emotional, behavioral, and physical health needs of all students on an ongoing basis.

[Narrative response]

1. A reasonable and sound plan for the school culture and staff that will intentionally expose students to post-secondary educational and career opportunities at all grade levels. The plan must identify the curricular or extracurricular programs that will provide students with access to college or career preparation and include research-based evidence that these programs increase educational aspirations for the anticipated student population.

[Narrative response]

1. A clear description, provided as **Attachment E (1 page limit)**, of a typical school day from the perspective of a student in a grade that will be served in the proposed school’s first year of operation that aligns with the proposed school’s vision and plan for school culture.

[Recommended narrative response: “A description of a student’s typical school day is provided as **Attachment E**.”]

1. Student Discipline.
   1. A clear description of the proposed school’s philosophy on cultivating positive student behavior and a student discipline policy that provides for appropriate, effective strategies to support a safe, orderly school climate and fulfillment of academic goals, promoting a strong school culture while respecting student rights.
   2. Legally sound policies for student discipline, suspension, dismissal, and crisis removal, including the proposed school’s code of conduct and procedural due process for all students, including students afforded additional due process measures under IDEA.
   3. Appropriate plan for including teachers, students, and parents or guardians in the development and/or modification of the proposed school’s policies for discipline, suspension, dismissal, and crisis removal.
   4. Legally sound list and definitions of offenses for which students in the school must (where non-discretionary) or may (where discretionary) be suspended or dismissed.

[Narrative response]

## Professional Culture and Staffing

1. **Professional Culture**
   1. A sound plan for the creation, implementation, and maintenance of a professional culture and clear explanation of how the professional culture will contribute to staff retention, how faculty and staff will be involved in school level decisions and in developing new initiatives, and how success will be assessed. Professional development and evaluation is covered in Criteria II.E.2 and should not be discussed here.

[Narrative response]

* 1. If a high proportion of economically disadvantaged students is a part of the anticipated student population, a clear description of how the proposed school will address the anticipated academic challenges posed by the lack of socioeconomic diversity and the concentration of poverty among its students.

[Narrative response]

* 1. A clear description, provided as **Attachment F (1 page limit)**, of a typical school day from the perspective of a teacher in a grade that will be served in the proposed school’s first year of operation that aligns with the proposed school’s vision and plan for professional culture.

[Recommended narrative response: “A description of a teacher’s typical school day is provided as **Attachment F**.”]

1. **Professional Development**
   1. A clear description of the appropriate goals and data-driven strategy of the proposed school for ongoing professional development, including whole staff development, grade/level/course teams, and instructional coaching. The description must explain how professional development topics will be identified and how the professional development plan will be driven by data to improve teaching and learning as well as school performance. The description must also include the process for evaluating the efficacy of the professional development.

[Narrative response]

* 1. A description of professional development opportunities, leadership, and scheduling that effectively support the Academic Plan and are likely to maximize success in improving student achievement, including an adequate induction program. The description must explain what will be covered during the induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional framework and methods.

[Narrative response]

* 1. A clear description of the expected number of days or hours for regular professional development throughout the school year that includes an explanation of how the proposed school’s calendar, daily schedule, and staffing structure accommodate this plan; the time scheduled for common planning or collaboration; and an explanation for how such time will typically be used. The description must identify ways the professional development scheduling conflicts with Master Collective Bargaining Agreements, explain any specific amendments that may be needed through supplemental agreements, and provide an adequate contingency plan in the event such amendments cannot be negotiated under supplemental agreements.

[Narrative response]

* 1. A description identifying the person or position with the time, capacity, and responsibility for coordinating professional development and a reasonable plan for identifying ongoing professional development needs, including sufficient funds and resources (Title II funds, etc.) for implementing the professional development plan.

[Narrative response]

1. **Staff Structure**
   1. A complete staffing chart for the proposed school, using the Staffing Chart Template (Exhibit 2) and provided as **Attachment G (required form)**, that clearly indicates all positions, is aligned with the Academic Plan, and proposes a salary structure that is in alignment with the proposed school’s budget.

[Recommended narrative response: “A staffing chart is provided as **Attachment G**.”]

* 1. A description of a reasonable rationale for the staffing plan, as demonstrated in the staffing chart, that clearly explains how the relationship between the proposed school’s leadership or management team and the rest of the staff will be managed and includes justifiable teacher-student and total adult-student ratios for the proposed school.

[Narrative response]

* 1. If the proposed school has a *virtual* or *blended learning program*, a clear description for the identification of the position(s) dedicated to IT support and a reasonable plan that clearly ensures sufficient capacity for deploying and managing technology inventory and network needs with minimal interruptions to teaching and learning, including troubleshooting support for school staff and students.

[Narrative response OR, if the proposed school does not contain a virtual or blended learning program, state, “Not applicable because the proposed school does not contain an online learning program.”]

1. **Staffing Plans, Hiring, Management, and Evaluation**
   1. A clear description of the proposed school’s recruitment and hiring strategy, criteria, timeline, and procedures that are likely to result in a strong teaching staff that meet “Highly Qualified” requirements in accordance with the Elementary and Secondary Education Act (“**ESEA**”) and are well-suited to the proposed school, including other key selection criteria and any special considerations relevant to the proposed school’s design. The description must also explain strategies, including compensation packages, that are likely to attract and retain high-performing teachers.

[Narrative response]

* 1. If the proposed school offers a *virtual* or *blended learning program*, a clear description of the proposed school’s recruitment and hiring strategy, criteria, timeline, and procedures that are likely to result in strong online learning teachers that have the requisite subject-matter knowledge, technological proficiency, communication skills, and other capabilities necessary to teach effectively in the online learning environment.

[Narrative response OR, if the proposed school does not contain a virtual or blended learning program, state, “Not applicable because the proposed school does not contain an online learning program.”]

* 1. A clear description of realistic and legally sound procedures for hiring and dismissing school personnel, including procedures for conducting criminal history record checks.

[Narrative response]

* 1. A thoughtful plan for supporting, developing, and annually evaluating school leadership and teachers that is likely to produce and retain a successful staff, including a description of the processes, protocols, framework, criteria, and/or tools that will be used for conducting evaluations, delivering feedback, and coaching. The plan must cite any evidence or existing research supporting the effectiveness of utilizing the specified approach. If already developed, the plan should provide any leadership evaluation tool(s) as **Attachment H (no page limit)** and any teacher evaluation tool(s) as **Attachment I (no page limit)** that are likely to be effective. Evaluation tools must align with the criteria outlined in BOE Policy 2055 and related provisions of any Master Collective Bargaining Agreements, unless specific amendments are executed in a supplemental agreement. If amendments will be needed, the plan must describe the specific amendments that would be necessary to implement the evaluation tool(s), demonstrate an understanding of the employment environment, and include a reasonable plan for contingencies if the amendments cannot be negotiated under a supplemental agreement.

[Narrative response]

* 1. An effective plan that explains how the proposed school intends to promote or incentivize satisfactory and exceptional school director, management team, and teacher performance and handle unsatisfactory school director, management team, or teacher performance, including effective planning for turnover.

[Narrative response]

* 1. A satisfactory explanation of any deviations in staffing plans, including salaries, from Master Collective Bargaining Agreements, including identification of amendments that would be needed in a supplemental agreement and a reasonable plan for contingencies if such amendments cannot be negotiated under a supplemental agreement.

[Narrative response]

* 1. If developed, reasonable and legally sound personnel policies or an employee manual, provided as **Attachment J (no page limit)**.

[Narrative response OR, if not developed, state, “Not applicable because personnel policies or an employee manual is not yet developed.”]

## School Calendar and Schedule

1. A school calendar for the proposed school’s first year of operation, including total number of days and hours of instruction, provided as **Attachment K (no page limit)**, and a satisfactory explanation of how the calendar aligns with and clearly reflects the needs of the Academic Plan.

[Narrative response]

1. A clear description of the structure of the proposed school’s day and week that aligns with and clearly reflects the needs of the Academic Plan, including the following:
2. A description of the length and schedule of the school week.
3. A description of the length and schedule of the school day including start and dismissal times.
4. The minimum number of hours or minutes per day and week that the proposed school will devote to academic instruction in each grade.
5. The number of instructional hours or minutes in a day for core subjects.
6. A satisfactory explanation of why the proposed school’s daily and weekly schedule will be optimal for student learning.
7. The number of hours or minutes in a day for teacher planning time.
8. A sample daily and weekly schedule for each division of the proposed school, provided as **Attachment L (no page limit)**.

[Narrative response]

## Supplemental Programs

1. If applicable, a description of a sound plan for any summer school programs the proposed school will offer that will meet anticipated student needs, including a clear explanation for how the programs are integral to the proposed school’s academic plan, a reasonable schedule and length of the program, and sound funding plan for the programs. If the programs will not be implemented in the first year of operation, the plan must describe the timeline for implementation.

[Narrative response OR, if not applicable, state, “Not applicable because the proposed school does not plan to offer any summer school programs.”]

1. If applicable, well-designed plans and identified funding for any extracurricular or co-curricular activities or programs the proposed school will offer that will meet anticipated student needs and provide enrichment experiences that are in alignment with the Academic Plan. The plans must describe how the activities and programs are integral to the proposed school’s academic plan, how often they will occur, how they will meet anticipated student needs, and how they will be funded. If the activities or programs will not be implemented in the first year of operation, the plans must describe the timeline for implementation.

[Narrative response OR, if not applicable, state, “Not applicable because the proposed school does not plan to offer any extracurricular or co-curricular activities or programs.”]

## Third-Party Service Providers

[If not partnering with Service Provider, delete the criteria text from this section and state “This section is not applicable. The proposed school does not plan to partner with a Service Provider.”]

### Service Provider Selection and Track Record

1. A reasonable explanation of why the applicant is seeking to contract with a Service Provider rather than operate the proposed school(s) directly.

[Narrative response]

1. A description of a thorough process that the applicant used to identify, vet, and select the Service Provider. The description must explain how and why the Service Provider was selected, including when and how the applicant learned of the Service Provider, which other Service Providers were considered, why the Service Provider was selected over other Service Providers, and what due diligence was conducted, including a summary of the findings of the reference checks conducted by the applicant.

[Narrative response]

1. If the Service Provider is providing academic services, evidence demonstrating academic success, especially in the grade levels the proposed school intends to serve, including academic performance data of all clients of the Service Provider that demonstrates the provider’s services lead to *high-quality charter schools*, as defined in the RFP. Provide, as **Attachment M (no page limit)**, academic performance data for each of the Service Provider’s charter school clients that shows evidence of strong academic results for the past three years (or over the life of the charter school, if the school has been open for fewer than three years), based on the following factors:
   * 1. Increased student academic achievement and attainment (including, if applicable and available, high school graduation rates and college and other postsecondary education enrollment rates) for all students, including, as applicable, *educationally disadvantaged students*, as defined in the RFP, served by the charter school;
     2. Either—
        1. Demonstrated success in closing historic achievement gaps for the following subgroups of students at the charter school: low-income students, students from major racial and ethnic groups, students with disabilities, and English language learners; or
        2. No significant achievement gaps between any of those subgroups of students at the charter school and significant gains in student academic achievement for all populations of students served by the charter school; and
     3. Results (including, if applicable and available, performance on statewide tests, annual student attendance and retention rates, high school graduation rates, college and other postsecondary education attendance rates, and college and other postsecondary education persistence rates) for low-income and other *educationally disadvantaged students* served by the charter school that are above the average academic achievement results for such students in the state.

[Narrative response]

1. A listing and explanation of any management contract terminations, charter revocations, non-renewals, or withdrawals or non-openings that the proposed Service Provider has experienced in the past five years that does not indicate that the Service Provider lacks the necessary capacity or display inconsistencies in its academic, organizational, or financial performance. The explanation must reference the other jurisdictions where the Service Provider operates or services other charter schools and provide, as **Attachment N (no page limit)**, a list of all the charter schools operated or managed by the Service Provider, the respective authorizer for each of those charter schools, and contact information for each authorizer.

[Narrative response]

1. A list or description of all charter schools operated or managed by the Service Provider that are accredited, if any, including a list or description of the accrediting organization for each accredited school and a current accreditation report from **one** of those schools, provided as **Attachment O (no page limit)**, that demonstrates strong organizational health attributable to the Service Provider.

[Narrative response]

### Legal Relationships

1. Full disclosure of any existing or potential conflicts of interest between the proposed school governing board, proposed school’s employees, proposed Service Provider, and any affiliated business entities and a satisfactory explanation as to how such existing or potential conflicts of interest will be addressed.

[Narrative response]

1. A list of all subsidiaries or related entities that are affiliated or owned in whole or in part by the Service Provider, a description of the nature of those entities’ business activities, an explanation as to whether the proposed school has or will have any relationship with or receive any services from any of those entities, and a reasonable justification for any such relationship.

[Narrative response]

1. If the Service Provider will have supervisory responsibilities, a description of the supervision of the proposed school employees by the Service Provider that is reasonable, legally sound, and aligns to Master Collective Bargaining Agreements and gives the proposed school governing board oversight over the Service Provider’s supervisory responsibilities. The description must explain the supervisory responsibilities of the Service Provider, including which school employees the Service Provider will supervise, how the Service Provider will supervise these employees, and how the proposed school governing board will oversee the Service Provider’s supervisory responsibilities.

[Narrative response OR, if the Service Provider will not have supervisory responsibilities, state, “Not applicable because the Service Provider will not have supervisory responsibilities.”]

1. If the proposed school governing board intends to enter into any type of lease, lease-purchase agreement, or any other facility or financing relationships with the Service Provider, draft facility or financing agreements, or other evidence, provided as **Attachment P** **(no page limit)**, that:
   * 1. Demonstrate such agreements are separately documented and not part of or incorporated in the proposed school’s management contract; and
     2. Ensure any agreements are consistent with the proposed school governing board’s authority and practical ability to terminate the management agreement and continue operation of the proposed school.

[Narrative response OR, if no such agreement or relationship is intended, state, “Not applicable because the proposed school governing board does not plan to enter into any type of lease, lease-purchase agreement, or any other facility or financing relationships with the Service Provider.”]

1. A description of any loans, grants, or investments made between the Service Provider and the proposed school or the proposed school’s associated nonprofit organization, including a legally sound explanation of how any such loans, grants, or investments may be initiated, repaid, and refused by the proposed school or the proposed school’s associated nonprofit, as applicable.

[Narrative response OR, if not applicable, state, “Not applicable because the Service Provider has not made any loans, grants, or investments between the proposed school or the proposed school’s associated nonprofit organization.”]

### Service Provider’s Organizational Structure

1. A draft management agreement, provided as **Attachment Q (no page limit)**, that includes:
   * 1. The duration of the management agreement;
     2. Clear roles and responsibilities of the parties;
     3. A clear and well-defined scope of services and costs of all resources;
     4. A clear compensation structure and payment schedule that identifies all fees, bonuses, and other compensation to be paid to the Service Provider;
     5. Reasonable conflict of interest provisions that adhere to state law;
     6. Reasonable renewable provisions that describe the conditions and procedures (including timeframes, notice, and decision-making procedures) for renewal, how often will the management agreement be renewed, and the conditions that both the Service Provider and the proposed school must satisfy for the management agreement to be renewed;
     7. Reasonable termination provisions that describe the conditions and procedures (including timeframes, notice, and decision-making procedures) for termination and the grounds that the Service Provider or the proposed school may terminate the management agreement for cause as well as the grounds for termination without cause; and
     8. Reasonable indemnification provisions in the event of default or breach by either party.

[Recommend narrative response: “A draft management agreement is provided as **Attachment Q**.”]

1. A detailed description of the roles and responsibilities of the Service Provider that adequately and accurately describes how the Service Provider fits into the proposed school’s organizational structure and how the organizational structure ensures the proposed school governing board is independent from the Service Provider and self-governing, including a satisfactory description of independent legal representation and arm’s-length negotiating.

[Narrative response]

1. A satisfactory business plan that demonstrates the Service Provider will be able to provide the services in the management agreement. The business plan must explain how the Service Provider will grow, scale, or adjust its operations to ensure quality service to the proposed school.

[Narrative response]

1. An effective and comprehensive oversight and evaluation plan for overseeing the Service Provider. The oversight and evaluation plan must include the school-wide and student achievement results that the management organization is responsible for achieving, the methods the proposed school governing board will use to review and evaluate the Service Provider’s progress toward achieving agreed-upon goals, the frequency of such reviews and evaluations, an explanation whether there will be an external evaluator to assess the Service Provider’s performance, and the conditions, standards, and procedures for the proposed school governing board intervention, if the Service Provider’s performance is deemed unsatisfactory.

[Narrative response]

1. A comprehensive description of the respective financial responsibilities of the proposed school governing board and the Service Provider that allows for reasonable financial controls from the proposed school governing board. The description must include details about who will own property purchased with public funds, which operating and capital expenditures each party be responsible for, the types of spending decisions the Service Provider can make without obtaining board approval, the reports the Service Provider must submit to the proposed school governing board on financial performance and the schedule for reporting, and how the proposed school governing board will provide financial oversight.

[Narrative response]

1. A comprehensive and adequate plan for the operation of the proposed school in the event of termination of the management agreement.

[Narrative response]

## Conversion Charter School Additional Academic Information

[If not a Conversion Charter School applicant, delete the criteria text from this section and state “This section is not applicable. The proposed school is not a conversion charter school.”]

### Performance Record. A clear explanation of the track record, under Strive HI, of the DOE school to be converted and its bearing on the decision to apply for conversion to the charter school model. The explanation must satisfactorily demonstrate that the applicant adequately considered the DOE school’s track record and how converting to a charter school would improve academic performance and increase student achievement outcomes for student population currently being served by the DOE school.

[Narrative response]

1. Organizational Plan

## Governance

1. A clear description of the mission and vision of the proposed school governing board that is aligned with the proposed school’s mission and vision, if different from the proposed school’s mission and vision, and a clear and concise description of the governance philosophy that will guide the proposed school governing board, including proposed school governing board’s bylaws and any other governing policies (except the Code of Ethics and Conflict of Interest policy, which will be provided separately) that are comprehensive and sound, provided as **Attachment R (no page limit)**, and the completed and signed Statement of Assurances (Exhibit 3), provided as **Attachment S (required form)**.

[Narrative response]

1. Organizational charts, provided as **Attachment T (no page limit)**, that clearly indicate all positions and illustrate the proposed school governance, management, and staffing structure in: a) Year 1; and b) all subsequent years until full capacity is reached. The organizational charts must clearly delineate the roles and responsibilities of (and lines of authority and reporting among) the proposed school governing board, staff, any related bodies (such as the proposed school’s supporting nonprofit organization, advisory bodies, or parent/teacher councils), and any external organizations that will play a role in managing the proposed school. The organization charts must also document clear lines of authority and reporting between the proposed school governing board and proposed school and within the proposed school.

[Recommended narrative response: “Organizational charts are provided as **Attachment T**.”]

1. A description of an effective governance structure of the proposed school, including the primary roles of the proposed school governing board and how it will interact with the school director, any school management teams, any essential partners, and any advisory bodies. The description must include the size, current and desired composition, powers, and duties of the proposed school governing board that will foster the proposed school’s success; identify key skills or areas of diverse expertise that are or will be effectively represented on the proposed school governing board; and adequately explain how this governance structure and composition will help ensure that: a) the proposed school will be an academic and operational success; b) the proposed school governing board will effectively evaluate the success of the proposed school and school director; and c) there will be active and effective representation of key stakeholders, including parents or guardians.

[Narrative response]

1. If the proposed school has a *virtual* or *blended learning program*, a clear description of the role the governing board will play in the online learning program that ensures the effective oversight of the online learning program, including a clear and realistic description of the requisite knowledge of online learning that the proposed governing board currently possesses or will endeavor to possess.

[Narrative response]

1. Demonstrated will, capacity, and commitment of current and proposed governing board members to govern the proposed school effectively by providing the following:
   1. A list of all current and identified proposed school governing board members and their intended roles;
   2. A clear summary of members’ qualifications for serving on the proposed school governing board, including an adequate explanation of how each member meets any of the considerations in HRS §302D-12 and will contribute a wide range of knowledge, skills, and commitment needed to oversee a *high-quality charter school*, including academic, financial, legal, and community experience and expertise;
   3. Completed and signed Board Member Information Sheets (Exhibit 4) and resumes for each proposed governing board member, provided as **Attachment U (required form; no page limit)**, that demonstrates board members share a vision, purpose, and expectations for the proposed school; and
   4. If not all board members have been identified, a comprehensive and sound plan and timeline for identifying and recruiting governing board members with the necessary skills and qualifications, including a description of such skills and qualifications.
   5. If the current board will transition from an Applicant Governing Board to a more permanent governing board, a comprehensive and sound plan for such a transition, including a reasonable timeline for recruiting and adding new members; a brief description of the individual and/or collective skills sets the anticipated board members are expected to bring, with specific reference to the skill sets described in HRS §302D-12; a description of the priorities for recruitment of additional or replacement proposed school governing board members and the kinds of orientation or training new members will receive; and identification of any bylaws, policies, or procedures changes that will be necessary for such a transition.

[Narrative response]

1. A clear description of effective governance procedures, including an explanation of the procedure by which current proposed school governing board members were selected and how any vacancies will be filled; an explanation of how often the board will meet both during start-up and during the school year; any plans for a committee structure and identification of chairs for any proposed committee(s); and a description of the governing board meetings, including how and where meetings will be conducted, how the governing board will provide meaningful access to the public, and if board meetings are to be conducted virtually (such as through conference calls, videoconference, or web conference).

[Narrative response]

1. A clear description of any existing relationships that could pose actual or perceived conflicts if the application is approved, the specific steps that the proposed school governing board will take to avoid any actual conflicts and to mitigate perceived conflicts, and appropriate Code of Ethics and Conflict of Interest policies or procedures, provided as **Attachment V (no page limit)**, that will minimize real or perceived conflicts and align to applicable laws.

[Narrative response]

1. A clear description of sound plans for increasing the capacity of the proposed school governing board, orientation of new members, and ongoing training and development for members, including reasonable timelines, specific and thoughtful topics and capacities to be addressed, and requirements for participation.

[Narrative response]

1. A clear description of any advisory bodies or councils, including clear roles and duties, the planned composition, the strategy for achieving that composition, and resumes of any individuals that have been identified to serve on these advisory bodies or councils, provided as **Attachment W (no page limit)**. The description must include an explanation of an effective relationship between the advisory bodies or councils and the proposed school governing board and the proposed school’s leadership team or management team, including the role of parents or guardians, students, and teachers and the reporting structure as it relates to the proposed school’s governing board and leadership.

[Narrative response OR, if no advisory bodies or councils, state, “Not applicable because the proposed school and governing board do not plan to have any advisory bodies or councils.”]

## Performance Management

1. Comprehensive and effective plans for evaluating and monitoring academic, financial, and organizational performance that explain how the proposed school will measure and evaluate performance data, including:
   1. Academic Performance Data Evaluation Plan. A comprehensive and effective plan and system for:
      1. Collecting, measuring, and analyzing student academic achievement data of individual students, student cohorts, and the school as a whole―throughout the school year, at the end of each academic year, and for the term of the Charter Contract—including identification of the student information system to be used;
      2. Using the data to refine and improve instruction, including descriptions of training and support that school directors, any management team, teachers, and governing board members will receive in analyzing, interpreting, and using academic performance data to improve student learning; the qualified person(s), position(s), and/or entities that will be responsible for managing the data, interpreting it for teachers, and leading or coordinating data-driven professional development to improve student achievement; and how the person(s), position(s), and/or entities will be provided time to complete the aforementioned collection, analysis, management, interpretation, and coordination of data-driven professional development; and
      3. Reporting the data to the school community.

[Narrative response]

* 1. Financial Performance Data Evaluation Plan. A comprehensive and effective plan and system for maintaining, managing, compiling, and interpreting financial data monthly, quarterly, annually, and for the term of the Charter Contract, including descriptions of the qualified person(s), position(s), and/or entities that will be responsible for maintaining the data, managing the data, compiling it, and interpreting it for the school director and governing board and how the person(s), position(s), and/or entities will be provided time to complete the aforementioned maintenance, management, compiling, and interpretation.

[Narrative response]

* 1. Organizational Performance Data Evaluation Plan. A comprehensive and effective plan and system for maintaining, managing, compiling, and interpreting organizational performance data monthly, quarterly, annually and for the term of the Charter Contract, including descriptions of the qualified person(s), position(s), and/or entities that will be responsible for compiling data on performance and interpreting it for the school director and governing board and how the person(s), position(s), and/or entities will be provided time to complete the aforementioned compiling and interpretation.

[Narrative response]

1. A clear description of thoughtful, appropriate corrective actions the proposed school will take if it falls short of:
   1. Student academic achievement expectations or goals at the school-wide, classroom, or individual student level, including an explanation of what would trigger such corrective actions and the person(s), position(s), and/or entities that would be responsible for implementing them;
   2. Financial performance standards set in the Financial Performance Framework, including an explanation of the actions that would be taken if the proposed school is issued Notices of Concern or Deficiency under the terms of the Charter Contract, if the independent auditor issues findings, or if the proposed school encounters financial difficulties; and
   3. Organizational performance standards set in the Organizational Performance Framework, including an explanation of the actions that would be taken if the proposed school is issued Notices of Concern or Deficiency under the terms of the Charter Contract or if the proposed school has a corrective action plan approved by the Commission.

[Narrative response]

1. If already developed, School-Specific Measures, provided as **Attachment X (no page limit)** and using the School-Specific Measures Template (Exhibit 5), that propose reasonable assessments that are aligned with the Academic Plan.

[Narrative response (attachment) OR, if not developed, state, “Not applicable because School-Specific Measures are not yet developed.”]

## Ongoing Operations

1. If the proposed school will provide daily transportation, a sound plan describing the transportation arrangements for prospective students, including a description of how the proposed school plans to meet transportation needs for field trips and athletic events.

[Narrative response OR, if not applicable, state, “Not applicable because the proposed school will not provide daily transportation.”]

1. Sound plans for safety and security for students, the facility, and property, including descriptions of policies and the types of security personnel, technology, and equipment that the proposed school will employ. If the proposed school has a *virtual* or *blended learning program*, the description must include physical or virtual security features to deter theft.

[Narrative response]

1. If the proposed school will provide food service, a sound plan describing the proposed school’s plan for providing food to its students, including plans for a facility with a certified kitchen, transporting food from a certified kitchen, or other means of providing food service that is in compliance with applicable laws.

[Narrative response OR, if not applicable, state, “Not applicable because the proposed school will not provide food service.”]

## Student Recruitment, Admission, and Enrollment

1. A sound, thoughtful, and comprehensive plan for student recruitment and marketing that will provide equal access to interested students and families and specifically describes plans for outreach to families in poverty, academically low-achieving students, students with disabilities, and other youth at risk of academic failure, as well as plans for promoting socioeconomic and/or demographic diversity, including a description of how the proposed school will attempt to make itself attractive to families with relatively higher incomes and/or levels of formal education if the proposed school is projecting a high percentage of free and reduced lunch and intends to achieve socioeconomic and/or demographic diversity.

[Narrative response]

1. If applicable, the identification and description of any enrollment preferences that the proposed school would request that are in compliance with federal and state law and any Commission policies or guidelines, including a reasonable justification for the enrollment preference request.

[Narrative response OR, if not applicable, state, “Not applicable because the proposed school will not seek any enrollment preferences.”]

1. An admission and enrollment policy, provided as **Attachment Y (no page limit)**, that complies with applicable laws and any Commission policies or guidelines, ensures the proposed school will be open to all eligible students, and includes:
   1. A reasonable timeline and comprehensive plan for the application period, including admission and enrollment deadlines and procedures and an explanation of how the school will receive and process applications;
   2. A reasonable timeline and comprehensive plan for student recruitment or engagement and enrollment;
   3. Effective procedures for lotteries, waiting lists, withdrawals, re-enrollment, and transfers in accordance with state and Commission requirements; and
   4. Descriptions of reasonable pre-admission activities for students and parents or guardians, including an explanation of the purpose of such activities.

[Recommended narrative response: “An admission and enrollment policy is provided as **Attachment Y**.”]

## Parent Involvement and Community Outreach

1. A clear description of the proposed school’s philosophy on parent and community involvement and the role of parents or guardians and the community in the proposed school, including a summary of what has been done to assess and build parent and community interest in the proposed school and the results achieved.

[Narrative response]

1. Sound parent engagement plans that are welcoming and accessible to all parents or guardians from the time that the proposed school is approved through opening and after the proposed school is opened, including plans for building family-school partnerships that strengthen support for learning and encourage parental involvement and any commitments or volunteer activities the proposed school will seek from or offer to parents or guardians.

[Narrative response]

1. Effective strategies describing how the proposed school will inform and engage parents or guardians and the community about the proposed school’s development.

[Narrative response]

1. A description of any community resources and partnerships the proposed school has established with community organizations, businesses, or other educational institutions that will benefit students and parents or guardians, including the nature, purposes, terms, and scope of services of any partnerships and existing evidence of commitment and support from identified community partners, provided as **Attachment Z (no page limit)**, such as letters of intent or commitment, memoranda of understanding, and/or contracts.

[Narrative response]

## Nonprofit Involvement

1. If applicable, a clear and comprehensive description of the proposed school’s associated nonprofit organization, including its current tax status and/or the plan and timeline for obtaining tax exempt status and the nonprofit’s mission and purpose. The description must specifically identify ways that the proposed school’s associated nonprofit organization will support the proposed school (such as community fundraising, developing partnerships, finding alternative funding sources, writing grants, and finding other ways to leverage existing resources) and specify any grants or programs that the nonprofit is planning to use. If the nonprofit’s mission is not to solely support the proposed school, the description must also adequately explain any competing interests for the nonprofit’s time and resources and how the proposed school will ensure such competing interests will not hinder the school’s ability to operate and obtain outside supports.

[Narrative response OR, if not applicable, state, “Not applicable because the proposed school does not have an associated nonprofit organization.”]

1. A list of all current and identified nonprofit board members that is in compliance with the State Ethics Code and their intended roles and a description demonstrating that the nonprofit board members have the necessary experience and qualifications relevant to the above means of supporting the proposed school. If none of the current nonprofit board members have the requisite experience or capacity, the description must explain a comprehensive plan to identify and recruit individuals with the necessary experience and capacity.

[Narrative response OR, if not applicable, state, “Not applicable because the proposed school does not have an associated nonprofit organization.”]

## Geographic Location and Facilities

1. Geographic Location.
2. A description, with reasonable specificity, of the geographic location of the proposed school’s facility, including the DOE complex area(s) in which the proposed school will be located.

[Narrative response]

1. A reasonable rationale for selecting the geographic location and a comprehensive description of the research conducted, if any, to support that rationale.

[Narrative response]

1. Facilities.
   1. If the proposed school has obtained a facility, a description of the facility—including address, square footage, square footage rent, amenities, previous use, and what needs to be done in order for the facility to be in compliance and meet requirements to serve as a school—demonstrating that the facility is reasonably adequate for the intended purposes, has a sound plan and timeline for renovating and bringing the facility into compliance with applicable building codes, and will meet the requirements of the Academic Plan, including the needs of the anticipated student population. If the proposed school has a *virtual* or *blended learning program*, or relies heavily on technology, the description must adequately explain how the facility will support the proposed technology model, including electrical capacity and access to sufficient network capacity. The description must reference and provide, as **Attachment AA (no page limit)**, a letter of intent, Memorandum of Understanding (“MOU”), or other proof of intent to secure a specific facility. [Delete the criterion text after this bracket if a facility has been obtained. **OR**, delete the criterion text after this bracket if a facility has not been obtained.]If the proposed school has not obtained a facility, a comprehensive, reasonable, and sound plan and timeline for identifying, securing, renovating, and financing a facility—including identification any brokers or consultants the applicant is employing—that will be in compliance with applicable building codes and meet the requirements of the Academic Plan, including the needs of the anticipated student population. The plan must briefly describe possible facilities within the geographic area in Criterion III.G.1, including addresses, square footage, square footage rent, amenities, previous use, and a general assessment of what needs to be done to bring each possible facility into compliance. If the proposed school has a *virtual* or *blended learning program*, or relies heavily on technology, the description must adequately explain how each possible facility will support the proposed technology model, including electrical capacity and access to sufficient network capacity.

[Narrative response]

* 1. If the proposed school plans to add students or grade levels during the first five years, a reasonable and sound facility growth plan that shows how the school will accommodate the additional square footage necessary for additional students, faculty, and staff and sufficiently identifies any permits or rezoning that might be necessary to implement the facility growth plan.

[Narrative response OR, if not applicable, state, “Not applicable because the proposed school does not plan to add students or grade levels during its first five years.”]

## Start-Up Period

1. A comprehensive, reasonable, and sound management plan for the start-up period, provided as **Attachment BB (no page limit)**, that aligns with the Academic, Organizational, and Financial Plans (including the start-up year (Year 0) budget in the Financial Plan Workbook). The management plan must detail the start-up plan for the proposed school, including specific tasks, timelines, milestones, and responsible individuals for each of the following areas:
   1. Plans to obtain financing for the proposed school’s facility, highlighting the alignment of the financing plan with the timing of obtaining and renovating the facility, as described in Criterion III.G.2;
   2. Plans to fund the start-up period, including all plans for fundraising and grant writing and a description of any specific fundraising opportunities and grants the applicant has identified;
   3. Plans to market the proposed school to the school’s anticipated student population and develop partnerships with other charter schools, DOE schools, and private schools to identify possible students and achieve the proposed school’s projected enrollment, including any other ways the applicant plans to achieve its projected enrollment;
   4. Plans to hire teachers, administrative staff, and support staff during the start-up period, if any, incorporating the timelines for hiring teachers, described in Criteria II.E.4, and delivering the professional development, described in Criteria II.E.2;
   5. Plans to identify, recruit, select, and add or replace new governing board members that align with the recruitment plan described in Criterion III.A.5.d, the governing board transition plan described in Criterion III.A.5.e, and any governing board training described in Criterion III.A.8, as applicable; and
   6. Any other plans for activities that will need to be completed during the start-up period, such as the selection of curriculum materials, as applicable.

[Recommended narrative response: “A management plan for the start-up period is provided as **Attachment BB**.”]

1. A sound plan for leading the development of the school during its pre-opening phase, including identification of capable individuals who will work on a full-time or nearly full-time basis following approval of the application to lead development and implementation of the plan to open the proposed school and a description of a viable plan to obtain the funding necessary to compensate these individuals that is aligned with the budget.

[Narrative response]

## Conversion Charter School Additional Organizational Information

[If not a Conversion Charter School applicant, delete the criteria text from this section and state “This section is not applicable. The proposed school is not a conversion charter school.”]

### School Community

1. A certification and supporting documentation, provided as **Attachment CC (no page limit)**, as verifiable evidence that this application was approved by a majority of the votes cast by existing administrative, support, and teaching personnel and parents or guardians of students at the existing DOE school. The documentation must include a breakdown of the number of administrative, support, and teaching personnel and parents or guardians of students who constitute the existing DOE school and the number of each of the aforementioned groups who actually participated in the vote.

[Recommended narrative response: “Evidence that this application was approved by a majority of the votes cast by existing administrative, support, and teaching personnel and parents or guardians of students at the existing DOE school is provided as **Attachment CC**.”]

1. A clear explanation of the process used to engage various stakeholder groups and collect evidence of support that demonstrates that there was reasonable effort to encourage engagement from all stakeholders, especially faculty and families, in discussing and deciding to apply for a Conversion Charter School.

[Narrative response]

1. A clear description and explanation of the degree of opposition to the conversion, the reasons for opposition, and any other community stakeholders that support conversion, including, provided as **Attachment DD (no page limit)**, any additional evidence of community support for the conversion and opposition to the conversion. The description must adequately explain how the proposed school and governing board will address any opposition to ensure there are no negative impacts to student learning and the operations of the school.

[Narrative response]

### Staff Plans and Evaluation

1. A clear description of the rights and management issues of employees at the existing DOE school, and a detailed framework that addresses any issues and protects the rights of such employees.

[Narrative response]

### Facilities

1. A sound plan for the use of the existing DOE school facilities that is aligned with the proposed budget, including a reasonable timeline for negotiating a lease or memorandum of agreement with the DOE, a plan for ongoing upkeep and maintenance, and any plans for renovation.

[Narrative response]

1. Nonprofit Organization as Applicant.

[If not proposing a Conversion Charter School that will be managed and operated by a nonprofit organization, delete the criteria text from this section and state “These criteria are not applicable because the proposed conversion charter school will not be managed and operated by a nonprofit organization.”]

* 1. A clear description of the organizational structure of the nonprofit organization and reasonable and legally sound plans for how it will also serve as the governing board of the Conversion Charter School and how governing board members will be selected. If the nonprofit organization is going to appoint advisory groups of community representatives for each school managed by the nonprofit organization, the description must include the organizational structure and scope of jurisdiction for each advisory group.

[Narrative response]

* 1. The nonprofit organization’s bylaws or policies, provided as **Attachment EE (no page limit)**, that are legally sound and describe the manner in which business is conducted and policies that relate to the management of potential conflict of interest situations.

[Recommended narrative response: “The nonprofit organization’s bylaws and policies are provided as **Attachment EE**.”]

* 1. A clear description that demonstrates that the nonprofit organization possess sufficient experience in the management and operation of public or private schools or plans to enter into an agreement to obtain services from another entity or entities possessing such experience.

[Narrative response]

* 1. A reasonable explanation of how the nonprofit organization will execute and implement its start-up plan without interfering in the operations of the existing DOE school until authorized to do so by the Commission.

[Narrative response]

* 1. A description of any licensure or accreditation requirements, such as registration with the Department of Commerce and Consumer Affairs, the nonprofit organization must comply with and the status of any such licenses or accreditations that demonstrates the nonprofit is in good standing with all such requirements.

[Narrative response]

1. Financial Plan

## Financial Oversight and Management

1. A clear description that gives reasonable assurance that the proposed school will have sound systems, policies, and processes for financial planning, accounting, purchasing, and payroll, including an adequate explanation of how the proposed school will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements. The description must also explain the plans and procedures for conducting an annual audit of the financial and administrative operations of the proposed school that is in accordance with state law, including a reasonable annual cost estimate of the audit that is included in the Financial Plan Workbook.

[Narrative response]

1. A clear description of the roles and responsibilities that demonstrates a strong understanding of the appropriate delineation of such roles and responsibilities among the proposed school leadership team or management team and proposed school governing board regarding school financial oversight and management.

[Narrative response]

1. A description of sound criteria and procedures for selecting vendors or contractors for any administrative services, such as business services, payroll, and auditing services, including reasonable anticipated costs that are reflected in the Financial Plan Workbook.

[Narrative response]

## Operating Budget

1. Complete, realistic, and viable start-up and three-year operating budgets, provided through the Financial Plan Workbook (Exhibit 6) as **Attachment FF (required form)**, that align to the Academic and Organizational Plans.

[Recommended narrative response: “The start-up and three-year operating budgets are provided as **Attachment FF**.”]

1. Budget Narrative. A detailed budget narrative that clearly explains reasonable, well-supported cost assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative must specifically address the degree to which the school budget will rely on variable income (especially for grants, donations, and fundraising) and must include the following:
   1. A description indicating the amount and sources of funds, property, or other resources expected to be available not only via per-pupil funding but also through corporations, foundations, grants, donations, and any other potential funding sources. The description must note which are secured and which are anticipated; explain evidence of commitment, and provide such evidence as **Attachment GG (no page limit)**, for any funds on which the proposed school’s core operation depends (*e.g.*, grant award letters, MOUs); and describe any restrictions on any of the aforementioned funds.
   2. A sound contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated, including contingencies for scenarios where the official enrollment of the proposed school is substantially lower than projected and/or anticipated variable income is not received. The contingency plan must also include a Year 1 cash flow contingency, in the event that revenue projections are not met in advance of opening.
   3. If the proposed school has a *virtual* or *blended learning program*, a clear and comprehensive description of the necessary costs for delivery of such program, including costs associated with hardware, software, peripheral needs (cases, headphones, chargers, etc.), storage, and network infrastructure needs, as applicable.

[Narrative response]

1. Applicant Capacity

## Academic Plan Capacity

1. Evidence that the key members of the proposed school’s academic team have the collective qualifications and capacity (which may include, but is not limited to, documented and relevant credentials and experience reflected in the resumes of all members and an understanding, as demonstrated by the application responses, of challenges, issues, and requirements associated with running a *high-quality charter school*) to implement the school’s Academic Plan successfully. The evidence must include a description that:
   1. Clearly identifies the key members of the applicant’s academic team that will play a substantial role in the successful implementation of the Academic Plan, including current or proposed governing board members, school leadership or management, and any essential partners who will play an important ongoing role in the proposed school’s development and operation; and
   2. Describes the academic team’s individual and collective qualifications for implementing the proposed school’s Academic Plan successfully, including sufficient capacity in areas such as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent or guardian and community engagement.

[Narrative response]

1. A description of the academic team’s clear ties to and/or knowledge of the community in the geographic area where the facility is or will be and/or areas where the anticipated student population will come from.

[Narrative response]

1. A description that identifies any organizations, agencies, or consultants that are essential partners to the successful planning and establishing of the proposed school and/or implementation of the Academic Plan; explains the current and planned roles of such essential partners and any resources they have contributed or plan to contribute to the proposed school’s development; and includes evidence of support, provided as **Attachment HH (no page limit)** (such as letters of intent or commitment, memoranda of understanding, and/or contracts), from such essential partners demonstrating these partners are committed to an ongoing role with the proposed school, if applicable.

[Narrative response]

1. School Director.

If the school director is known, a description that:

1. Identifies the school director;
2. Summarizes the school director’s academic and organizational leadership record and includes this individual’s resume, provided as **Attachment II (no page limit)**;
3. Discusses and demonstrates evidence of the proposed school director’s experience in and ability to design, launch, and lead the proposed school in achieving its mission and effectively serving the anticipated student population, as well as evidence that the proposed school director is well qualified to implement the Academic Plan.
4. Describes a thorough recruiting and selection process for selecting the school director, including the rigorous criteria used for screening and selecting candidates based on experience and ability to design, launch, and lead a *high-quality charter school*.

[If the school director is known, delete the text after these brackets in this criterion. **OR**, if the school director is not known, delete the text before these brackets in this criterion.]

If the school director is not known, a description that:

1. Discusses the characteristics of the school director that the proposed school will seek and an appropriate job description or qualifications and rigorous criteria, provided as **Attachment JJ (no page limit)**, that is designed to recruit a school director with the experience and ability to design, launch, and lead a *high-quality charter school* that will effectively serve the anticipated student population and implement the Academic Plan; and
2. Explains a clear and appropriate timeline that aligns with the proposed school’s start-up plan and a comprehensive plan for a thorough recruiting and selection process where candidates will be screened using rigorous criteria.

[Narrative response]

1. Management Team. A description of the positions that will make up the proposed school’s leadership or management team beyond the school director, if any, including appropriate responsibilities and qualifications for such positions. The description must:
2. If known, identify the individuals who will fill these positions and provide, as **Attachment KK (no page limit)**, the resumes for these individuals as evidence that the individuals demonstrate the qualifications, capacities, and commitment to carry out their designated roles to ensure the success of the proposed school.

[If the management team is known, delete the text after these brackets in this criterion. **OR**, if the management team is not known, delete the text before these brackets in this criterion.]

1. If not known, provide sound job descriptions or qualifications and criteria that will be used to select these positions, as **Attachment LL (no page limit)**, as well as describe a sound timeline, recruiting, and selection process for recruiting and hiring these individuals.

[Narrative response]

## Organizational Plan Capacity

1. Evidence that the key members of the proposed school’s organization team have the collective qualifications and capacity (which may include, but is not limited to, documented and relevant credentials and experience reflected in the resumes of all members and an understanding, as demonstrated by the application responses, of challenges, issues, and requirements associated with running a *high-quality charter school*) to implement the school’s Organizational Plan successfully. The evidence must include a description that:
   1. Clearly identifies the key members of the applicant’s organization team that will play a substantial role in the successful implementation of the Organizational Plan, including current or proposed governing board members, school leadership or management, and any essential partners who will play an important ongoing role in the Organizational Plan; and
   2. Describes the organization team’s individual and collective qualifications for implementing the proposed school’s Organizational Plan successfully, including sufficient capacity in areas such as staffing, professional development, performance management, general operations, facilities acquisition, development (such as build-out or renovations), and management.

[Narrative response]

1. A description that identifies any organizations, agencies, or consultants that are essential partners in planning, establishing, or implementing the proposed school’s Organizational Plan; explains the current and planned roles of such partners and any resources they have contributed or plan to contribute to the proposed school’s development of its Organizational Plan; and includes evidence of support, included in **Attachment HH** (as referenced in Criterion V.A.3), from such essential partners demonstrating these partners are committed to planning, establishing, and/or implementing the Organizational Plan.

[Narrative response]

## Financial Management Capacity

1. Evidence that the key members of the proposed school’s financial team have the collective qualifications and capacity (which may include, but is not limited to, documented and relevant credentials and experience reflected in the resumes of all members and an understanding, as demonstrated by the application responses, of challenges, issues, and requirements associated with running a *high-quality charter school*) to implement the school’s Financial Plan successfully. The evidence must include a description that:
   1. Clearly identifies the key members of the applicant’s financial team that will play a substantial role in the successful implementation of the Financial Plan, including current or proposed governing board members, school leadership or management, and any essential partners who will play an important ongoing role in the proposed school’s Financial Plan; and
   2. Describes the financial team’s individual and collective qualifications for implementing the proposed school’s Financial Plan successfully, including sufficient capacity in areas such as financial management, fundraising and development, accounting, and internal controls.

[Narrative response]

1. A description that identifies any organizations, agencies, or consultants that are essential partners in planning, establishing, or implementing the proposed school’s Financial Plan; explains the current and planned roles of such partners and any resources they have contributed or plan to contribute to the proposed school’s development of its Financial Plan; and includes evidence of support, included in **Attachment HH** (as referenced in Criterion V.A.3), from such essential partners demonstrating these partners are committed to planning, establishing, and/or implementing the Financial Plan.

[Narrative response]