



State Public Charter School Commission 2015-2016 Request for Proposals

Issued: September 18, 2015

Intent to Apply Packet Due: October 16, 2015

Applications Due: February 12, 2016

For questions, please contact:

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**STATE OF HAWAII'
BOARD OF EDUCATION**
P.O. BOX 2360
HONOLULU, HAWAII 96804

Message to prospective applicants from the Hawaii State Board of Education

The State of Hawai'i Board of Education appreciates this opportunity to join the State Public Charter School Commission in welcoming your interest in creating a new school to join our public school 'ohana.

Charter schools are uniquely positioned to demonstrate how empowerment can produce exceptional outcomes. The Board of Education believes that charter schools can provide working examples of what can be accomplished when educators and administrators are held to high academic standards and are empowered to reach or exceed these high standards. While there are ongoing challenges, your Board of Education is working closely with the Charter School Commission to improve the charter school environment and encourage innovative approaches to education.

Our public education system has made progress, but we must continue on this positive path and always find ways to improve. The Board of Education invites you to be a part of this journey by proposing an outstanding new school to serve Hawaii's children.

We look forward to welcoming the new public schools that come of this important process.

Aloha,

A handwritten signature in cursive script that reads "Lance A. Mizumoto".

Lance A. Mizumoto
Chairperson

DAVID Y. IGE
GOVERNOR



CATHERINE PAYNE
CHAIRPERSON

STATE OF HAWAII
STATE PUBLIC CHARTER SCHOOL COMMISSION
(‘AHA KULA HO‘ĀMANA)

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Message to prospective applicants from the State Public Charter School Commission

On behalf of students throughout Hawaii and the State Public Charter School Commission, thank you for your interest in applying to operate a high-performing public charter school. We understand that opening and running an exceptional school requires a tremendous amount of commitment, fortitude, and hard work.

Hawaii state law charges the Commission with the mission of authorizing high-quality public charter schools throughout Hawaii. To that end, the Commission welcomes proposals for new public charter schools that will help provide Hawaii’s families with a range of high-quality and innovative educational options.

The Commission is committed to quality in every aspect of chartering, and we firmly believe that high-quality authorizing leads to high-quality schools. We want to be clear that the Commission is committed to approving only applicants that it believes convincingly demonstrate the academic, financial, and organizational capacity and vision necessary to operate high-performing schools. Our mission is too important, and the stakes for Hawaii’s keiki too high, for us to provide our students and families with anything less than the very best that charter schooling has to offer Hawaii’s public education system.

Reflecting the importance of this undertaking, the Commission employs a rigorous and transparent application process, based on national best practices. The process is arduous and its rules stringently observed, but it has been carefully designed to be fair and to help ensure that any successful application results in a school of excellence. As you embark upon this process, please feel free to contact the Commission with any questions you might have regarding the application or the application review. Please direct all questions to Kenyon Tam, Operations and Applications Specialist, at kenyon.tam@spcsc.hawaii.gov.

We commend you in advance for your dedication to providing Hawaii’s children with the first-rate education they deserve and will need in the 21st Century. We look forward to learning about your vision for the school that will do so.

Aloha,

A handwritten signature in cursive script that reads "Catherine Payne".

Catherine Payne
Chairperson

REQUEST FOR PROPOSALS

I. Introduction

In 2012, the Hawaii State Legislature passed Act 130, replacing the State’s previous charter school law, Hawaii Revised Statutes (“HRS”) Chapter 302B, with our new law, codified as HRS Chapter 302D. Act 130 instituted a rigorous, transparent accountability system that at the same time honors the autonomy and local decision-making of Hawaii’s charter schools. The law created the State Public Charter School Commission (“**Commission**”), assigned it statewide chartering jurisdiction and authority, and directed it to enter into State Public Charter School Contracts (“**Charter Contract**”) with every existing charter school and every newly approved charter school applicant. Applicants are expected to read the current Charter Contract template to fully understand the requirements and obligations it sets forth. The Charter Contract is separate and apart from the application. Once the approved applicant has a Charter Contract, it will not be bound to fulfill the requirements of the Charter Contract in a manner consistent with all of the details described in the application. Conversely, a new school’s Charter Contract may require certain things that are not consistent with all of the details in the proposed school’s application. The applicant will, however, be required to adhere to major factors, like enrollment, grades offered initially, and mission and vision, to ensure that the school that is opened is substantially consistent with the proposed school application. In part, the application is meant to demonstrate that applicants have the capacity to develop a viable plan and the capacity to implement such plan.

A. Applicant Types

HRS Chapter 302D governs the establishment and operation of public charter schools. Applicants are expected to read HRS Chapter 302D to fully understand its requirements so that the application is consistent with the law.

Pursuant to HRS Chapter 302D, two types of public charter schools may be established:

- Start-up Charter School means a new charter school established under HRS §302D-13 that is not a Conversion Charter School.
- Conversion Charter School means:
 - (1) Any existing school operated by the Department of Education (“**DOE**”) that converts to a charter school in accordance with HRS §302D-13; or
 - (2) Any existing DOE school that converts to a charter school and is managed and operated by a nonprofit organization in accordance with HRS §302D-13.

All applicants must complete the application. Conversion Charter School applicants must complete additional questions specific to Conversion Charter Schools.

B. Autonomy and Accountability

The key premise of charter schooling is sometimes referred to as “the Charter Bargain.” In exchange for relatively more rigorous accountability, a public charter school is granted relatively greater freedom and flexibility to innovate compared to traditional public schools.

A charter school has substantial operational autonomy over a number of areas, including governance, design and delivery of its academic plan, school management and operations, finances, and, if

applicable, Charter Management Organization (“**CMO**”), Educational Management Organization (“**EMO**”), or Education Service Provider (“**ESP**”) agreements.

With this autonomy comes strong accountability. Charter schools are accountable for meeting academic, financial, and organizational performance standards as described in HRS Chapter 302D:

Academic Performance. Charter schools are required to adhere to state academic standards and to comply with, and be evaluated under, the State’s Strive HI Performance System (“**Strive HI**”) and other academic standards and targets established by the performance framework in the Charter Contract. These can include School-Specific Measures proposed by the school itself in order to reflect the school’s distinct mission and philosophy. Charter schools are required to administer all student testing required by federal and state law, rules, policies, and procedures. Charter schools are also required to serve students with special needs.

Financial Performance. Charter schools must demonstrate the proper use of public funds, as evidenced by annual budgets, quarterly financial reports, annual financial statements, and independent audits.

Organizational Performance. A charter school’s governing board is responsible for ensuring that the charter school complies with all applicable laws. The governing board itself is required to adhere to the laws that apply to it, particularly as outlined in HRS §302D-12.

These three areas of performance correspond to three of the main sections of the application and to the three key areas of the Charter Contract, which every successful applicant will enter into with the Commission. The initial term of the Charter Contract will be five years. All charter schools, including newly opened charter schools, are evaluated annually under the three areas of performance. After the initial contract term, the Commission will review the charter school’s performance and may renew the Charter Contract for a subsequent term on the basis of the charter school’s performance. A charter school that is unable to demonstrate academic, financial, or organizational performance in accordance with the performance framework or is unable to comply with legal, contractual, or financial requirements may be granted a relatively shorter subsequent Charter Contract term. In the case of more serious performance problems, the school may face nonrenewal or revocation of its Charter Contract. Conversely, a charter school that is performing well in all three areas will be granted a longer contract term and have additional years before having to apply for Charter Contract renewal.

C. Strategic Vision for Authorizing and Priority Needs

The Commission is statutorily tasked with authorizing “high-quality public charter schools throughout the State.” For purposes of applications, the emphasis here is on “high-quality.”

The Commission’s strategic vision for the chartering of these high-quality schools is that they not only provide excellent and diverse educational options for Hawaii’s families but that they also contribute meaningfully to the continued improvement of Hawaii’s public education system as a whole. This context is important for prospective applicants to bear in mind as they consider the kind of institution they envision creating. The Application Requirements and Criteria ask the applicant to articulate what contributions the new school is expected to make to public education in Hawaii.

For this year’s Request for Proposals, the Commission particularly welcomes proposals that would address the following Priority Needs:

1. New schools that would provide additional school capacity in geographic areas where existing public schools are already exceeding, have already reached, or are projected to reach or exceed full enrollment capacity; and
2. New schools that would serve communities where existing public schools are not performing well academically, as measured by the State's Strive HI Performance System and other student outcomes, and that present a plan for improving these outcomes.

It is important to emphasize that every application, even one that proposes to address either or both of these Priority Needs, will be considered on its own substantive merits. The fact that an application proposes to address these Priority Needs will not compensate in the evaluation for substantive deficiencies in its proposed Academic, Financial, or Organizational Plans or the Applicant Governing Board's capacity. Neither will applications that do not propose to address these Priority Needs be disfavored. Nonetheless, a plan to address these system challenges will be an additional positive consideration and could also be a compelling means for the Applicant Governing Board to garner the participation and support of high-capacity strategic partners.

II. Eligibility and Legal Requirements

- 1.** Applicant Governing Boards must have members with strong academic management, financial management, human resources, and fundraising expertise. All Applicant Governing Board members should provide the Applicant Governing Board with a diversity of perspective and a level of objectivity that accurately represents the interests of the anticipated students and demonstrate an understanding of best practices of nonprofit governance.
- 2.** Applicant Governing Boards must represent that they meet all requirements listed in the Intent to Apply Packet by submitting a signed copy of the forms.
- 3.** Applicant Governing Boards must meet the eligibility requirements, as evidenced by their Intent to Apply Packet, in order to submit an application and continue with the application process.
- 4.** Nonprofit organizations that establish an Applicant Governing Board must be registered with the State of Hawaii Department of Commerce and Consumer Affairs and in good standing and recognized as a tax exempt entity under the Internal Revenue Code.
- 5.** Applicant Governing Boards proposing a Conversion Charter School must submit all documentation required by HRS Chapter 302D.
- 6.** No charter school may begin operations before obtaining Commission approval of its charter application and execution of a Charter Contract and fulfilling any pre-opening requirements that may be imposed by the Commission.

III. Application Process Overview and Timeline

This is a truncated and annotated version of the timeline table, which covers only the major milestones that affect applicants and explains the steps in the process. Dates are approximate and are subject to change.

September 11, 2015	Pre-Request for Proposals (“RFP”) Orientation
September 18, 2015	Release of RFP
September 25, 2015	RFP Orientation
October 16, 2015	Deadline for prospective applicants to submit Intent to Apply Packets
October 23, 2015	Prospective applicants are notified of their eligibility to submit an application
February 12, 2016	Deadline for eligible applicants to submit applications
February 19, 2016	Applicants receive notifications of completeness
February 21, 2016	Deadline for applicants to submit missing information (if applicable)
February 22 to April 1, 2016	Application initial evaluation window
April 4-8, 2016	Evaluation Team interviews applicants
April 22, 2016	Requests for Clarification are distributed to applicants
May 6, 2016	Deadline for applicants to submit responses to Requests for Clarification
May 12, 2016	Commission holds public hearing on charter school applications
June 24, 2016	Applicants receive Recommendation Reports
July 8, 2016	Deadline for applicants to submit written responses to Recommendation Reports
July 28, 2016	Application Committee Meeting on application decisions
August 11, 2016	Commission General Business Meeting on final application decisions
August 12, 2016	Applicants are notified of the Commission’s decision
August 2016 to July 2017	New charter school start-up period for approved applications
July 2017	Opening of new charter school

IV. Application Guidelines

The Commission is pleased to invite proposals for new high-quality public charter schools. Prior to developing your application, please be sure to read this entire document.

A. Components of the Application

Note: All information that an applicant plans to submit must be contained within the Components of the Application, as described below.

Public hearing testimony on the application, DOE comments, and the Applicant Response (as defined in [Section IV.K](#)) are not considered Components of the Application that will be evaluated by the Evaluation Team. However, the Commission can consider these elements, as described in [Section IV.F](#). How all of these components fit into the Commission's Evaluation Process is set forth in [Figure 1](#). The following are the Components of the Application:

1. [Intent to Apply Packet](#). All applicants **must** submit the Intent to Apply Packet, including all applicable documentation listed on the Intent to Apply Packet Cover Sheet. The completed Intent to Apply Packet will be reviewed by Commission staff, and applicants will be notified of the findings within a timely manner. Applicants deemed ineligible will not be permitted to submit an application or continue with the application process.
2. [Narrative Proposal](#). The Narrative Proposal is the formal application to the Commission and is a comprehensive description of the proposed school's academic, organizational, and financial plans.
3. [Attachments](#). Throughout the application, specific documents are requested in addition to narrative answers. Attachments may not contain additional narrative unless requested. A list of the attachments is provided in these guidelines. No additional attachments to those listed are permitted.
4. [Interview](#). Applicants will demonstrate their ability and capacity to open and maintain a *high-quality charter school*, as defined in [Section IV.J](#), and to answer specific questions about their application.
5. [Request for Clarification](#). Applicants will have the opportunity to respond in writing to specific questions from the Evaluation Team reviewing their proposal by responding to a Request for Clarification.
6. [Other Information](#). These may include reports, documentation, or other data relating to information contained in the Components of the Application.

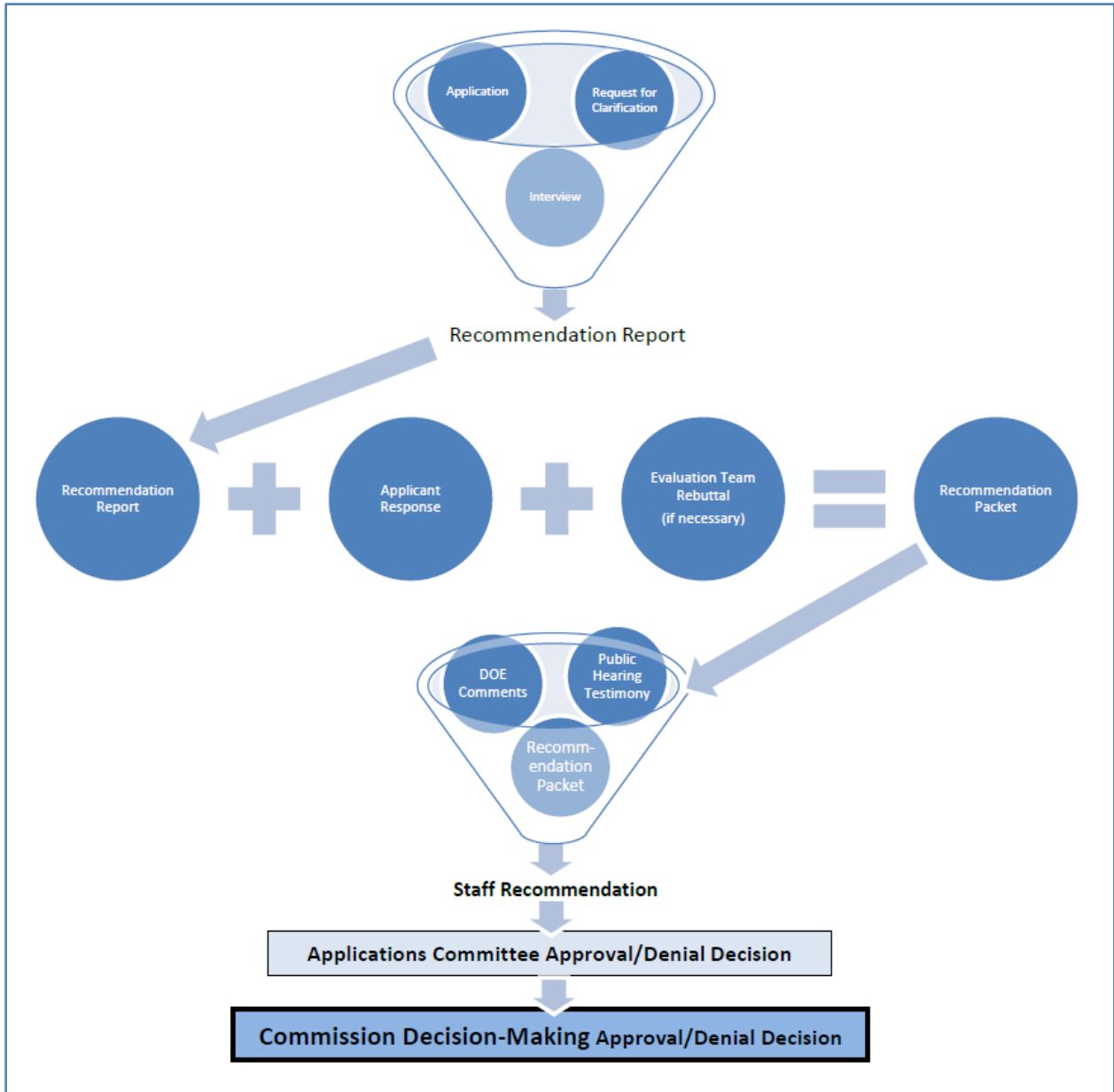


Figure 1: Commission’s Evaluation Process

B. Specifications

The Intent to Apply Packet and Applicant Information Sheet are web-based forms administered through a web-based application management system. The formatting of these web-based forms may be displayed differently from what is contained in this RFP, but all of the content will be the same. Attachments are separate electronic files, not web-based forms, and should be uploaded as specified in the web-based application management system. Please keep in mind that your application is a professional document. The quality of the document that you submit should reflect the quality of the school that you propose to open. The members of the Evaluation Team will be able to navigate well-organized, effectively-edited documents more easily, enabling them to focus their energy on reviewing

the content of the application. Grammar, spelling, and formatting all make an impression on an evaluator. Applications that are not clear and concise or are not easily discernible risk denial.

1. **Do not delete or modify questions, tables, or sections (including changing font sizes) in the templates provided unless specifically instructed in this document.**
2. Adhere to page and word limits where applicable. The Narrative Proposal without attachments is limited to 100 pages. Pages in excess of the page limit for the Narrative Proposal or any attachment will be redacted and will not be reviewed by the Evaluation Team. The Narrative Proposal may contain a table of contents and/or a bibliography/references section without penalty toward the maximum page limit.
3. 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. It is highly recommended that applicants use the Narrative Proposal template provided separately from this document to ensure correct formatting.
4. All elements of the application must be typed with 1-inch page margins and 12-point font, single-spaced, unless otherwise specified.
5. Every page of the Narrative Proposal must have a page number and the full name of the proposed school. All attachments must have the full name of the proposed school and a page number that specifically identifies the attachment (*e.g.*, "Attachment AA, Page 3" or "AA-3").
6. If a particular requirement or criterion does not apply to your proposed school or plan, simply respond "Not Applicable," **and** state the reason this requirement or criterion is not applicable to the proposed school or plan.
7. When submitting resumes, label each document with the individual's affiliation with the proposed school (*e.g.*, board member, school director, teacher).
8. Review all elements of your application for completeness before submitting. Late, incomplete, or incorrectly formatted submissions will not be accepted. Applicants will not be permitted to submit new information, as detailed in Section IV.G.
9. Staff will review all written elements of the application for completeness before they are accepted and distributed to the Evaluation Team. Additionally, the web-based application management system will not accept submissions unless all required attachments are included. If an element of the application is found to be incomplete or incorrectly formatted, the applicant will have forty-eight (48) hours from the time notice of the error is sent out to rectify the identified issues and resubmit the application.
10. Complete all sheets in the Financial Plan Workbook.
11. The following is a list of templates and forms. Applicants **must** use the following templates where applicable:

Exhibit 1: Enrollment Plan

- Exhibit 2: Staffing Chart Template
- Exhibit 3: Statement of Assurances Form
- Exhibit 4: Board Member Information Form
- Exhibit 5: School-Specific Measures Template
- Exhibit 6: Financial Plan Workbook

12. The following is a list of attachments to accompany the Narrative Proposal. Note that not all attachments will be mandatory for all applicants. It is the responsibility of the applicant to ensure it submits all required and relevant attachments. The items in bold print have a Commission template or form that applicants **must** use. The section of the application where the attachment is described is in parentheses. All required attachments should be clearly labeled.

- Attachment A.** **Enrollment Plan** (Criterion I.B.1)
- Attachment B.** Description, citations, or copies of data sources justifying Enrollment Plan (Criterion I.B.3)
- Attachment C.** Listing of DOE complex areas and public and private schools (Criterion II.A.3)
- Attachment D.** Map or list of each standard for each course in each grade (Criterion II.B.2)
- Attachment E.** Student’s typical school day (Criterion II.D.4)
- Attachment F.** Teacher’s typical school day (Criterion II.E.1.c)
- Attachment G.** **Staffing Chart Template** (Criterion II.E.3.a)
- Attachment H.** Leadership evaluation tool (Criterion II.E.4.d)
- Attachment I.** Teacher evaluation tool (Criterion II.E.4.d)
- Attachment J.** Employee manual or personnel policies (Criterion II.E.4.g)
- Attachment K.** First year school calendar (Criterion II.F.1)
- Attachment L.** Daily and weekly schedule (Criterion II.F.2.g)
- Attachment M.** Academic performance data for each charter school client of Service Provider (Criterion II.H.1.c)
- Attachment N.** List of charter schools operated or managed by Service Provider (Criterion II.H.1.d)
- Attachment O.** Accreditation report from one school operated or managed by Service Provider (Criterion II.H.1.e)
- Attachment P.** Service Provider agreement evidence (Criterion II.H.2.d)
- Attachment Q.** Management agreement with Service Provider (Criterion II.H.3.a)
- Attachment R.** Governing board bylaws and governing policies (Criterion III.A.1)
- Attachment S.** **Statement of Assurances** (Criterion III.A.1)
- Attachment T.** School governance, management, and staffing organizational charts (Criterion III.A.2)
- Attachment U.** **Board Member Information Forms** for each member (Criterion III.A.5.c)
- Attachment V.** Governing board’s Code of Ethics and Conflict of Interest policies (Criterion III.A.7)
- Attachment W.** Advisory body member’s resume and professional biography (Criterion III.A.9)

Attachment X.	School-Specific Measures Template (Criterion III.B.3)
Attachment Y.	Admission and enrollment policy (Criterion III.D.3)
Attachment Z.	Evidence of community partner support (Criterion III.E.4)
Attachment AA.	Proof specific facility secured (Criterion III.G.2.a)
Attachment BB.	Start-up project management plan (Criterion III.H.1)
Attachment CC.	Certification and supporting documentation for conversion application approval (Criterion III.I.1.a)
Attachment DD.	Additional evidence of support of or opposition to conversion (Criterion III.I.1.c)
Attachment EE.	Nonprofit organization’s bylaws or policies (business and conflict of interest) (Criterion III.I.3.b)
Attachment FF.	Financial Plan Workbook (Criterion IV.B.1)
Attachment GG.	Evidence of commitment for funds (Criterion IV.B.2.a)
Attachment HH.	Evidence of support from essential planning and implementation partners (Criterion V.A.3)
Attachment II.	School director’s resume (Criterion V.A.4.b)
Attachment JJ.	School director’s job description or qualifications (Criterion V.A.4.e)
Attachment KK.	School leadership and management team’s resumes (Criterion V.A.5.a)
Attachment LL.	School leadership and management team’s job descriptions or qualifications (Section V.A.5.b)

C. Submission Instructions

The Intent to Apply Packet, Applicant Information Sheet, Narrative Proposal, attachments, and response to the Request for Clarification are submitted through a web-based application management system, FluidReview. The Intent to Apply Packet and Applicant Information Sheet are web-based forms while the Narrative Proposal, attachments, and response to the Request for Clarification are individual files that need to be uploaded to FluidReview in the proper file format. Narrative responses for web-based forms may be drafted using any word processing application and copied and pasted into the web-based forms; but be sure to limit your narrative response to any specified word limits. Web-based forms may be saved and do not need to be completed in one session. **If you do not receive a confirmation email when attempting to submit the Intent to Apply Packet, application, or response to the Request for Clarification, it may not have been submitted.** You may contact FluidReview for technical support with the system at help.fluidreview.com/contact. Applicants can expect a response from FluidReview technical support within 24 hours.

1. Prepare the application using the templates and online submission process established by the Commission. The **primary contact** of the applicant governing board needs to register and log into the Commission’s FluidReview site at <http://app.chartercommission.hawaii.gov>. The Intent to Apply Packet, Applicant Information Sheet, Narrative Proposal, attachments, and response to the Request for Clarification will be submitted through this account.
2. The Intent to Apply Packet must be completed and submitted through the Commission’s FluidReview site by 12:00 p.m., Hawaii Standard Time, on October 16, 2015.

3. Upon submitting the Intent to Apply Packet and being deemed eligible to apply, the applicant will be given access to complete the Applicant Information Sheet and submit the Narrative Proposal and attachments.
4. Ensure all required fields within the Applicant Information Sheet are completed and the Narrative Proposal and all required attachments are uploaded, and submit the application through the Commission's FluidReview site by 12:00 p.m., Hawaii Standard Time, on February 12, 2016. **Once the application is submitted, no changes may be made to the submittal.**
5. The Narrative Proposal must be submitted through the Commission's FluidReview site as a .pdf file. All other attachments must be submitted through the Commission's FluidReview site, as specified.
6. The Commission will notify applicants of the process of submitting other necessary documentation throughout the application process. Applicants that do not submit other required Components of the Application by the deadlines set by the Commission risk their applications being disqualified or denied.

D. Applicant Code of Conduct

Commissioners and the Evaluation Team are obligated to make decisions and recommendations in the best interests of the students and the public, free from personal or political influences. Similarly, applicants have the responsibility of respecting and upholding the integrity of the charter school application process. Specifically, applicants shall **not**:

1. Direct any communications, including application documents, to any Commissioner or Evaluation Team member. All communications from applicants should be directed to Commission staff; or
2. Initiate, or attempt to initiate, any activity with any Commissioner or member of the Evaluation Team that may be prohibited by HRS Chapter 84, Standards of Conduct.

If the Commission determines that an applicant has violated any of these requirements, the applicant's application may be deemed ineligible for further consideration, and the application may be disqualified or denied. If the Commission determines that any individual associated with any applicant has violated any of these requirements, including operating through third-parties with the intent of circumventing these requirements, the associated applicant's application may be deemed ineligible for further consideration, and the application may be disqualified or denied.

E. Academic Integrity of the Application

The Commission defines plagiarism as copying words, concepts, or ideas from any source and submitting the material as one's own without acknowledging the source by the use of footnotes, quotation marks, and/or parenthetical references.¹ Individuals and groups seeking the responsibility to educate public school children with public funds should be accountable to the highest standards of academic integrity. The Commission considers plagiarism, including the copying of language from any other charter application without proper attribution and citation, as grounds for disqualification or denial.

¹ Definition adapted from the University of Southern Mississippi's Academic Integrity Policy and quoted in the Mississippi Charter School Authorizer Board's ("MCSAB") Fall 2014 Request for Proposals.

The Commission is cognizant that in order to implement an existing curriculum, instructional framework, or educational model (*e.g.*, Montessori, project-based learning, blended learning) with fidelity, key concepts must be discussed. However, a high-quality applicant group with the capacity to operate a high-quality school should be able to explain thoughtfully in their own words how they intend to educate children. The Commission also understands that CMOs, EMOs, and ESPs may use their own intellectual property, which is appropriate and acceptable.²

F. Application Evaluation Process

Note: *The Commission shall disregard any new information, as described in Section IV.G.*

Each complete application (which includes all Components of the Application, as described in Section IV.A) will be evaluated by an independent Evaluation Team that may include Commission staff, external national charter school evaluators, and external local evaluators. Commission staff may also observe the evaluation and interview processes. The Evaluation Team will be assembled by Commission staff. The Evaluation Team may receive training on best practices in application evaluation, applying the evaluation criteria in application review, and chartering in Hawaii. In the interest of consistency and transparency, the Evaluation Team will use standardized forms and reports. Each complete application or parts of the application may also be independently evaluated by a peer review team assembled by Commission staff and comprised of individuals, such as educators and administrators, from charter schools. Commission staff may also request comments from the DOE.

The Evaluation Team and the Commission serve different roles in the charter evaluation process:

- The Evaluation Team evaluates each application on its own merits against the published evaluation criteria and develops recommendations to the Commission based on written application materials and interviews. In developing its recommendations, the Evaluation Team considers only the Components of the Application listed in Section IV.A.
- While the duty of the Evaluation Team is to recommend approval or denial of each application based on its merits, the responsibility of the Commission is to decide whether to approve or deny each application.

The Evaluation Team will evaluate the Components of the Application. Based on the Components of the Application, the Evaluation Team will submit a recommendation for approval or denial as part of its Recommendation Report. Applicants will have the opportunity to submit written responses to the Recommendation Report ("**Applicant Response**"), and the Evaluation Team will be able to provide a rebuttal to the Applicant Response ("**Evaluation Team Rebuttal**"). Commission staff will consider the Recommendation Report, Applicant Response, and Evaluation Team Rebuttal (collectively, "**Recommendation Packet**"), along with the public hearing testimony, DOE comments, and any other relevant information in drafting a staff recommendation, which will be distributed to the Commission with the Recommendation Packet.

The Commission's Application Committee will consider the staff recommendation, Recommendation Packet, and public hearing testimony, DOE comments, and any other relevant information and make a recommendation to the full Commission regarding approval or denial of each application. At its General Business Meeting, the Commission will consider the staff recommendation, Recommendation Packet, public hearing testimony, DOE comments, any other relevant information, and the recommendations of

² Adapted from MCSAB's Fall 2014 Request for Proposals (page 10).

the Commission’s Application Committee and decide whether to approve or deny each application. However, the Commission will not consider any new information, as described in [Section IV.G](#).

G. New Information

Pursuant to national standards for charter school authorizers, the purpose of a rigorous application process is to “[grant] charters only to applicants that have demonstrated competence and capacity to succeed in **all aspects of the school**, consistent with the stated approval criteria.”³ Further, HRS Chapter 302D prohibits the Commission from providing technical support to charter applicants. As such, the application process is not intended to help applicants refine and finalize their applications. Applicants must be able to acquire the necessary expertise, competency, and capacity needed to develop a high-quality application on their own, and the information contained within the Narrative Proposal and attachments should be a complete and accurate depiction of the proposed plan. However, the Evaluation Team may consider additional information provided in the response to the Request for Clarification, provided that the Evaluation Team determines that the information provided is clear, fully describes any impacts to the entire application, and does not significantly alter the proposed plan.

Upon the issuance of the Recommendation Report, the applicant may not change any information provided in the Components of the Application (either through the Applicant Response, public testimony, or other means), as the Evaluation Team would not have had an opportunity to holistically evaluate such changes. Therefore, the Commission shall disregard any new information that was not available to the Evaluation Team prior to the issuance of the Final Application Recommendation Report. “New information” means any information that substantially differs from what is provided in the Components of the Application and is revisionary in nature, versus information that simply clarifies factual inaccuracies or misunderstandings represented in the Recommendation Report. Removal or addition of significant elements of curriculum that substantially change the academic plan, submittal of a substantially revised policy, or changing the geographic location or grades served are all examples of new information that the Commission will not consider in making its decision. Commission staff and the Evaluation Team will provide the Commission with guidance on what information is considered new or different.

H. Evaluation Criteria Overview

The Application Requirements and Criteria are the essential tools for the Evaluation Team, used in both their individual and team assessments of each application. The Evaluation Team presents both ratings on a scale and narrative analysis of each section of the application as compared to the Application Requirements and Criteria. Throughout the application evaluation process, evaluators will update their analysis to include additional information (due diligence, capacity interview, etc.) as it is presented. Within each section and subsection, specific criteria define the expectations for a response that “Meets the Standard.” In addition to meeting the criteria that are specific to that section, each part of the application should align with the other sections of the application. In general, the following definitions guide evaluator ratings:

³ Excerpt from the National Association of Charter School Authorizers’ *Principles & Standards for Quality Charter School Authorizing, 2012 Edition* (page 13).

Rating	Characteristics
Meets the Standard	The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the proposed school expects to operate; and inspires confidence in the applicant’s capacity to carry out the plan effectively.
Does Not Meet the Standard	The response meets the criteria in some respects but has substantial gaps, lacks detail and/or requires additional information in one or more areas and does not reflect a thorough understanding of key issues. It does not provide enough accurate, specific information to show thorough preparation; fails to present a clear, realistic picture of how the school expects to operate; and does not inspire confidence in the applicant’s capacity to carry out the plan effectively.
Falls Far Below the Standard	The response does not meet the criteria in most respects, is undeveloped or significantly incomplete; demonstrates lack of preparation; raises substantial concerns about the viability of the plan; or the applicant’s capacity to carry it out.

Opening a successful, high-performing charter school depends on having a complete, coherent plan. It is not an endeavor for which strength in one area can compensate for material weakness in another. Therefore, in order to receive a recommendation for approval, the application must demonstrate evidence of capacity to implement the proposed plan, meet the criteria for all main sections of the application (Academic Plan, Organizational Plan, Financial Plan, Applicant Capacity), and present an overall proposal that is likely to result in the successful opening of a *high-quality charter school*, as defined in [Section IV.J](#).

The complete evaluation criteria are incorporated into the Application Requirements and Criteria document.

I. Public Documents Notification

All information submitted to the Commission is public and subject to HRS Chapter 92F, also known as the Uniform Information Practices Act (“**UIPA**”), and is a public record. Information that is submitted to the Commission may be redacted from public record in accordance with exemptions provided under UIPA, provided that the applicant specifically identifies the information it believes should be redacted and provides an explanation justifying each redaction.

J. Definitions

The following terms are used in the RFP (and displayed in italics where applicable) as specifically defined below:

1. *Blended learning program*: A program that combines an *online learning* model with face-to-face instruction in a manner such that the *online learning* activities enhances and/or transforms the instructional model.
2. *Educationally disadvantaged students*: Economically disadvantaged students, students with disabilities, migrant students, English language learners, neglected or delinquent students, or homeless students.

3. *High-quality charter school*: A charter school that shows evidence of strong academic results, based on the following factors:
 - a. 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 *educationally disadvantaged students* served by the charter school;
 - b. Either—
 - i. Demonstrated success in closing historic achievement gaps for the following subgroups of students at the charter school:
 1. Economically disadvantaged students;
 2. Students from major racial and ethnic groups;
 3. Students with disabilities; and
 4. English language learners; or
 - ii. No significant achievement gaps between any of the above subgroups of students at the charter school and significant gains in student academic achievement for all populations of students served by the charter school;
 - c. 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 Hawaii;
 - d. Results on the Academic Performance Framework that meet or surpass the average performance of public schools statewide; and
 - e. No significant compliance issues (*i.e.*, no violation that could, if not addressed or if it represents a pattern of repeated misconduct or material non-compliance, lead to the revocation of a school’s charter contract), particularly in the areas of student safety, financial management, and equitable treatment of students.
4. *Online learning*: A form of distance education that uses the Internet and computer technologies to connect teachers and students and deliver curriculum.⁴
5. *Virtual learning program*: A program that uses an *online learning* model with students typically receiving fewer than five hours per week of face-to-face instruction.

K. Glossary of Terms

The following words and terms are used in the RFP as defined below:

Academic Performance Framework	The Academic Performance Framework described in the Charter Contract.
Academic Plan	The academic plan described in <u>Section II of the Application Requirements and Criteria</u> .
Applicant Governing Board	The founding board of a proposed charter school that is the entity that submits an application and, if approved, has authority to execute the initial Charter Contract, thereby becoming the governing board of the charter school.

⁴ Definition used by the International Association for K-12 Online Learning.

Applicant Information Sheet	The cover page to the formal application that includes basic information about the applicant.
Applicant Response	The applicant's written response to the Evaluation Team's Recommendation Report.
Application Requirements and Criteria	The formal requirements of the application that the Narrative Proposal and relevant attachments must address, as well as the evaluation criteria to which the Evaluation Team compares the Components of the Application.
Board Member Information Sheet	The form attached as <u>Exhibit 4</u> .
BOE	The Hawaii State Board of Education.
Charter Contract	The State Public Charter School Contract between the Commission and a charter school.
CIPA	Children's Internet Protection Act.
CMO	Charter Management Organization, specifically a nonprofit organization that has started and/or provides administrative support to a group of charter schools that may have a shared vision and mission.
COPPA	Children's Online Privacy Protection Act.
Commission	The Hawaii State Public Charter School Commission.
Components of the Application	The elements listed in <u>Section IV.A</u> .
Conversion Charter School	A Conversion Charter School as such term is defined by HRS §§302D-1 and -13.
DES	District/Complex Area Special Education Office.
DOE	The Hawaii Department of Education.
ELL	English Language Learners.
EMO	Educational Management Organization, specifically a for-profit organization that has started and/or provides administrative support to a group of charter schools that may have a shared vision and mission.
Enrollment Plan	The form attached as <u>Exhibit 1</u> .
ESEA	The federal Elementary and Secondary Education Act.
ESP	Education Service Provider, specifically an organization, either nonprofit or for-profit, that provides educational design, implementation, or comprehensive management services.
Evaluation Team	An independent team of evaluators assembled by Commission staff.
Evaluation Team Rebuttal	The Evaluation Team's rebuttal to the Applicant Response to the Recommendation Report.
FERPA	Family Educational Rights and Privacy Act.
FAPE	Free and Appropriate Public Education.
Financial Plan	The financial plan described in <u>Section IV of the Application Requirements and Criteria</u> .

Financial Plan Workbook	The form attached as Exhibit 6 .
FluidReview	The web-based application management system applicants must use to submit Intent to Apply Packets and various Components of the Application.
HRS	Hawaii Revised Statutes.
IEP	Individualized Education Program defining the learning objectives of a student who has been found to have a disability, as defined by federal law.
Intent to Apply Packet	The completed and signed Intent to Apply School Summary together with all applicable documentation listed on the Intent to Apply Packet Cover Sheet.
Master Collective Bargaining Agreements	The master agreement between the Hawaii State Teachers Association and BOE, July 1, 2013 – June 30, 2017, and any agreements between the DOE or BOE and United Public Workers and Hawaii Government Employees Association and any other unions.
MOU	Memorandum of Understanding.
NACSA	National Association of Charter School Authorizers.
Narrative Proposal	An applicant’s formal application to the Commission.
Organizational Plan	The organizational plan described in Section III of the Application Requirements and Criteria .
Pre-Opening Assurances	The criteria a Pre-Opening Charter School must satisfactorily fulfill before its Charter Contract is fully effectuated, thereby establishing it as a charter school.
Pre-Opening Charter School	A charter school that has restricted rights and obligations, such as not being allowed to hire employees or eligible to receive state funding, until it satisfactorily fulfills its Pre-Opening Assurances.
Priority Need	The Commission’s strategic priorities for authorizing new charter schools as described in Section I.C .
Recommendation Packet	A packet containing the Recommendation Report, Applicant Response, and Evaluation Team Rebuttal, as applicable.
Recommendation Report	A report recommending approval or denial of the application, which is generated by the Evaluation Team. The report evaluates the Components of the Application on its own merits against the published evaluation criteria.
Request for Clarification	A request generated by the Evaluation Team after reviewing an applicant’s Narrative Proposal and interviewing the applicant.
School-Specific Measures Template	The form attached as Exhibit 5 .
Service Provider	The term used to collectively refer to CMOs, EMOs, and ESPs.
Staffing Chart Template	The form attached as Exhibit 2 .
Start-up Charter School	A new school established under HRS §302D-13 that is not a Conversion Charter School.
Statement of Assurances Form	The form attached as Exhibit 3 .

Strive HI	Hawaii's Strive HI Performance System.
UIPA	Uniform Information Practices Act, HRS Chapter 92F.



State Public Charter School Commission 2015-2016 Intent to Apply Packet

INTENT TO APPLY PACKET

I. Cover Sheet

Proposed School Name
Name:
Primary Contact Information
Name:
Mailing Address:
Phone:
Email:

Type of charter school (select one)

<input type="checkbox"/>	1. Start-up charter school, as defined in HRS Chapter 302D
<input type="checkbox"/>	2. Conversion charter school, as defined in HRS Chapter 302D Name of DOE school to be converted: _____

Type of applicant group to establish an Applicant Governing Board (select one)*

<input type="checkbox"/>	1. Community group
<input type="checkbox"/>	2. Group of teachers
<input type="checkbox"/>	3. Group of teachers and administrators
<input type="checkbox"/>	4. DOE school (conversion charter school applications only)
<input type="checkbox"/>	5. School community council (conversion charter school applications only)
<input type="checkbox"/>	6. Nonprofit organization (components 3-6 of the Intent to Apply Packet listed below are required)** Name of nonprofit organization: _____

The components of the Intent to Apply Packet are as follows:

<input type="checkbox"/>	1. Completed Intent to Apply Packet Cover Sheet
<input type="checkbox"/>	2. Completed and executed Intent to Apply School Summary form
<input type="checkbox"/>	3. Proof of nonprofit registration with the Hawaii Department of Commerce and Consumer Affairs and a Certificate of Good Standing (applicable only if applicant type is nonprofit organization)
<input type="checkbox"/>	4. Copy of the Articles of Incorporation for the nonprofit (applicable only if applicant type is nonprofit organization)
<input type="checkbox"/>	5. Copy of IRS tax-exempt certification - OR - acknowledgement letter from the IRS regarding the tax status of the nonprofit (applicable only if applicant type is nonprofit organization)
<input type="checkbox"/>	6. A resolution from the nonprofit's board approving the execution of the Intent to Apply (applicable only if applicant type is nonprofit organization)

*Only applicant group types listed are eligible to establish an Applicant Governing Board.

**Only nonprofit organizations that provide components 3-6 are eligible to establish an Applicant Governing Board.

II. Intent to Apply School Summary

Describe the Applicant Governing Board, proposed school, and the nature of the plan to be presented in this application. The Applicant Governing Board must have members with academic management, financial management, human resources, and fundraising expertise to be eligible to submit an application.

Proposed School			
Name:			
Opening Year:			
Geographic Location:			
Location(s) of Anticipated Student Population:			
Grades Served Year 1:			
Grades Served at Capacity:			
School Director			
Name <i>(if identified)</i> :			
Current job/position:			
Applicant Governing Board Members			
Name:	Email:	Academic management expertise	
Name:	Email:	Financial management expertise	
Name:	Email:	Human resources expertise	
Name:	Email:	Fundraising expertise	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Name:	Email:	Other governance expertise <i>(specify)</i> :	
Anticipated Student Population			
Describe the student population you anticipate serving.	%FRL:	% SpEd:	% ELL:
Other:			
Proposed School Description			
School Model Specialty (check all that apply)	<input type="checkbox"/> Alternative <input type="checkbox"/> Arts <input type="checkbox"/> Career and Technical Education <input type="checkbox"/> Cultural Focus <i>(specify)</i> : <input type="checkbox"/> Disability <i>(specify)</i> :	<input type="checkbox"/> Language Immersion <i>(specify)</i> : <input type="checkbox"/> Montessori <input type="checkbox"/> STEM <input type="checkbox"/> Virtual or Blended Learning <input type="checkbox"/> Other <i>(specify)</i> :	
In 100 words or less, describe the mission and vision of your proposed school			

School Enrollment Projection

Academic Year	Projected # of Students	Grade Levels Served
Year 1 (2017-2018)		
Year 2 (2018-2019)		
Year 3 (2019-2020)		
Year 4 (2020-2021)		
Year 5 (2021-2022)		
At Capacity (specify year): _____		

Do any of the following describe the applicant governing board or the school to be proposed in the application?

- Will contract or partner with an Education Service Provider, Charter Management Organization, or other organization to provide school management services.
- Already operates schools in Hawaii.
- Already operates schools elsewhere in the United States.

If any of the boxes above are checked, fill out the table below.

Partner Information (if applicable)	
Education Service Provider or Charter Management Organization (includes existing charter school operators)	Name: Primary Contact: Mailing Address: Phone: Email:

Does the applicant, any members of the applicant governing board, or any partners of the applicant have charter school applications under consideration by any other authorizer(s) in the U.S.?

- Yes (if so, complete this table, adding lines as needed) No

State	Authorizer	Proposed School Name	Application Due Date	Decision Date

Does the applicant, any members of the applicant governing board, or any partners of the applicant have any new schools scheduled to open in the U.S. in the next five years?

- Yes (if so, complete this table, adding lines as needed) No

State	Authorizer	Proposed School Name	Grades Served	Opening Date

Certification

I certify that I have the authority granted by the Applicant Governing Board to submit this application and that all information contained herein is complete and accurate. I recognize that any misrepresentation could result in disqualification from the application process or revocation after award. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the Applicant Governing Board.

Signature of Application Primary Contact

Date

Title



State Public Charter School Commission 2015-2016 Applicant Information Sheet

APPLICANT INFORMATION SHEET

I. Applicant Summary

Proposed School	
Name:	
Opening Year:	
Geographic Location:	
Grades Served Year 1:	
Grades Served at Capacity:	
Proposed School Description	
School Model Specialty (check all that apply)	<input type="checkbox"/> Alternative <input type="checkbox"/> Arts <input type="checkbox"/> Career and Technical Education <input type="checkbox"/> Cultural Focus (<i>specify</i>): <input type="checkbox"/> Disability (<i>specify</i>):
	<input type="checkbox"/> Language Immersion (<i>specify</i>): <input type="checkbox"/> Montessori <input type="checkbox"/> STEM <input type="checkbox"/> Virtual or Blended Learning <input type="checkbox"/> Other (<i>specify</i>):

If the applicant is contracting or partnering with a Service Provider, fill out the table below.

Service Provider Information (<i>if applicable</i>)	
Service Provider (includes existing charter school operators)	Name: Primary Contact: Mailing Address: Phone: Email:

Does the applicant, any members of the Applicant Governing Board, or any Service Providers of the applicant have charter school applications under consideration by any other authorizer(s) in the U.S.?

Yes (*if so, complete this table, adding lines as needed*)
 No

State	Authorizer	Proposed School Name	Application Due Date	Decision Date

Does the applicant, any members of the Applicant Governing Board, or any Service Providers of the applicant have any new schools scheduled to open in the U.S. in the next five years?

Yes (*if so, complete this table, adding lines as needed*)
 No

State	Authorizer	Proposed School Name	Grades Served	Opening Date

II. Identifying Information

The following questions are intended to identify whether certain requirements and criteria within the Application Requirements and Criteria need to be addressed.

1. Is the applicant proposing to convert an existing DOE school into a charter school?

Yes No

If the answer is to question 1 “Yes,” the applicant must address all requirements and criteria specifically for Conversion applicants only.

2. Does the proposed school offer a program that uses an *online learning* model, as defined in the RFP, with students typically receiving fewer than five hours per week of face-to-face instruction?

Yes No

3. Does the proposed school offer a program that combines an *online learning* model, as defined in the RFP, with face-to-face instruction in a manner such that the online learning activities enhances and/or transforms the instructional model?

Yes No

4. Does the proposed school use *online learning* in any way, either during or after the school day?

Yes No

If the answer is “Yes” to either question 2, 3, or 4, the applicant must address all requirements and criteria specifically relating to *virtual and blended learning programs*.

5. Does the applicant currently operate charter schools in Hawaii or any other state?

Yes No

6. Will there be a third-party that provides a significant amount of assistance with educational services to the proposed school?

Yes No

7. Will there be a third-party that provides a significant amount of business services (back-office services, school operations, etc.) to the proposed school?

Yes No

If the answer is “Yes” to either question 5, 6, or 7, the applicant must address all requirements and criteria specifically for Service Providers in Section II.H of the Application Requirements and Criteria.



State Public Charter School Commission 2015-2016 Application Requirements and Criteria

APPLICATION REQUIREMENTS AND CRITERIA

I. School Overview

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

The School Overview section is not separately rated by evaluators. However, the Evaluation Team will consider each section of the application to assess its alignment with the statements in the School Overview section, as it provides the foundation for the entire application.

A. Executive Summary

The Executive Summary should provide a concise summary of the following elements:

1. **Mission.** A mission describes the fundamental purpose of the school. The proposed school's mission statement should:
 - a. Describe the core school design components, what the proposed school will accomplish in concrete terms, and what methods it will use;
 - b. Be attainable and consistent with high academic standards;
 - c. Reflect the key values that teachers, administrators, and students know and support;
 - d. 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
 - e. Be able to operationalize and guide the work and school culture.
2. **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.
3. **Geographic Location.** Briefly describe the geographic location and, if known, the address of the facility the proposed school plans to use.
4. **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.
5. **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.
6. **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.

7. Reason for Conversion (Conversion applicants only). Explain the rationale for applying to convert to a charter school.
 - a. How will the charter school model lead to improved academic outcomes and non-academic operations?
 - b. Describe the stakeholder groups that were engaged in the conversion decision making process, and explain their roles in the transition process.
8. 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.

B. 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*). These terms are defined in Section IV.J of the RFP and depicted in Figure 2 below.
2. 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.
3. 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)**.

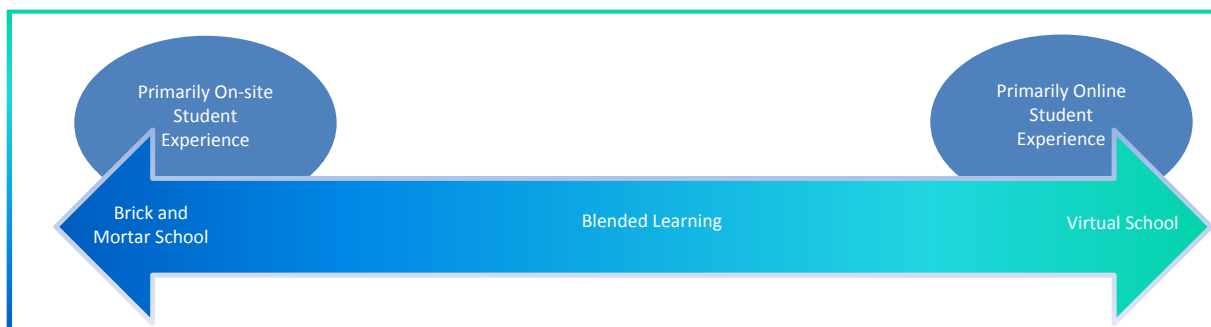


Figure 2: Virtual and Blended Learning Continuum

II. Academic Plan

A strong Academic Plan is coherent overall and aligned internally with the proposed school's mission and vision; Organizational Plan; and Financial Plan.

A. Academic Plan Overview, Academic Philosophy, and Student Population

This section is not separately rated by the evaluators. However, a strong Academic Plan will demonstrate consistent alignment with the 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.
2. 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.
3. 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.

B. Curriculum and Instructional Design

The components of this section should culminate in a comprehensive framework for rigorous, high-quality instructional design that reflects both the needs of the proposed school's anticipated population and its alignment to academic standards.

An application that meets the standard for approval will have the following elements:

1. A clear description of course outcomes for each course at each grade level.
2. 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.
3. 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).

4. 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.
5. 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.
6. 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.
7. Graduation Requirements.

Note: High schools will be expected to meet the BOE's graduation requirements in accordance with BOE Policy 4540. High schools may be able to deviate from such graduation requirements if a waiver is obtained from BOE. Any deviation from BOE Policy 4540 requires a waiver from BOE, and Commission approval of an application does not constitute approval of any deviation from BOE's graduation requirements. If the application is approved, it will be incumbent on the applicant either to: (1) obtain a waiver; or (2) if it cannot obtain a waiver, adjust its graduation requirements to meet BOE Policy 4540.

- a. 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.
 - b. 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.
8. Virtual and Blended Learning. If the proposed school's plan contains a *virtual or blended learning program*, as defined in the RFP:

- a. 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:
 - i. A description of the level of instruction that uses *online learning* methods (e.g., unit/lesson, single course, entire curriculum);
 - ii. 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;
 - iii. For *blended learning programs*, an explanation of whether and how the program enhances or transforms classroom instruction or does both;
 - iv. 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;
 - v. 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
 - vi. 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).
- b. 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.
- c. 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.
- d. 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.
- e. A description of the proposed school's online attendance policy that adheres to state and federal reporting requirements.
- f. A sound plan for administering and proctoring mandated assessments, including a reasonable budget that is reflected in the Financial Plan Workbook.
- g. 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.

- h. 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).
- i. 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.
- j. 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.)

C. Special Populations and At-Risk Students

Note: The proposed school will be linked to the District/Complex Area Special Education Office (“DES”) in the proposed school’s geographic area. Special education services will be coordinated out of the district office, as they are for all public schools. The charter school must ensure that each of its students with an individualized education program (“IEP”) receives all special education supports identified in the student’s IEP. The range of services may include related services, such as occupational and physical therapy, orientation and mobility training, adapted physical education, or assistive technology. Special education eligibility or the existence of an IEP is not a factor that a charter school can take into account when considering students for enrollment.

All charter schools must ensure that a Free and Appropriate Public Education (“FAPE”) can be provided for all enrolled students with disabilities. Once formed, the proposed school will consult with its DES to explore options for meeting the requirements of the offer of FAPE. The DES will review all of the current IEPs of special education students enrolled in the school and may offer staff, funding, or both to the school based upon the same per-pupil weighted formula used to allocate resources for special education students in DOE-operated schools. Applicants are expected to be familiar with and comply with all special education laws and requirements.

An application that meets the standard for approval will have the following elements:

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.
2. 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:

- a. 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;
 - b. The curriculum, daily schedule, staffing plans, instructional strategies, and resources that will be designed to meet the diverse needs of all students;
 - c. Methods for appropriate identification of potential students with special needs, how these methods will be funded, and how misidentification will be avoided;
 - d. 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;
 - e. 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;
 - f. For proposed schools that have a high school division, plans for promoting graduation;
 - g. Plans to have qualified staff adequate for the anticipated special needs population, especially during the beginning of the first year; and
 - h. 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.
3. 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.
 4. 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.

D. School Culture

This section of the proposal should describe the systems, traditions, and policies that will promote high expectations and a positive academic and social environment that fosters students' intellectual, social, and emotional development.

An application that meets the standard for approval will have the following elements:

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.

2. 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.
3. 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.
4. 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.
5. Student Discipline.
 - a. 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.
 - b. 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.
 - c. 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.
 - d. 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.

E. Professional Culture and Staffing

Note: Charter schools are subject to collective bargaining pursuant to HRS Chapter 89, Collective Bargaining in Public Employment. Applicants must ensure that their proposed plan will comply with collective bargaining requirements. Applicants proposing staffing plans that deviate from any Master Collective Bargaining Agreement must negotiate supplemental agreements with the respective exclusive representatives and should be cognizant of possible limitations of these agreements.

An application that meets the standard for approval will have the following elements:

1. Professional Culture

- a. 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.
- b. 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.

- c. 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.

2. Professional Development

- a. 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.
- b. 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.
- c. 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.
- d. 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.

3. Staff Structure

- a. 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.
- b. 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.

- c. 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.

4. Staffing Plans, Hiring, Management, and Evaluation

- a. 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.
- b. 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.
- c. A clear description of realistic and legally sound procedures for hiring and dismissing school personnel, including procedures for conducting criminal history record checks.
- d. 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.
- e. 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.
- f. 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.

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

F. School Calendar and Schedule

Note: While charter schools are exempted from HRS §302A-251, regarding instructional time, charter schools are subject to collective bargaining pursuant to HRS Chapter 89, Collective Bargaining in Public Employment. Applicants must ensure that their proposed plan will comply with collective bargaining requirements. Applicants proposing school calendars and schedules outside of the parameters of HRS §302A-251, must negotiate agreements that supplement any Master Collective Bargaining Agreements and should be cognizant of possible limitations of these agreements.

An application that meets the standard for approval will have the following elements:

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.
2. 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:
 - a. A description of the length and schedule of the school week.
 - b. A description of the length and schedule of the school day including start and dismissal times.
 - c. The minimum number of hours or minutes per day and week that the proposed school will devote to academic instruction in each grade.
 - d. The number of instructional hours or minutes in a day for core subjects.
 - e. A satisfactory explanation of why the proposed school's daily and weekly schedule will be optimal for student learning.
 - f. The number of hours or minutes in a day for teacher planning time.
 - g. A sample daily and weekly schedule for each division of the proposed school, provided as **Attachment L (no page limit)**.

G. Supplemental Programs

This section should describe any supplemental programs that are integral to the proposed school's academic plan. These supplemental programs can be a part of the proposed school's growth plan if they will not be implemented immediately.

An application that meets the standard for approval will have the following elements:

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.
2. 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.

H. Third-Party Service Providers

Note: This section is required of any applicant intending to contract with a Service Provider. A Service Provider is any third-party entity, whether nonprofit or for-profit (including CMOs, EMOs, and ESPs), that provides comprehensive education management services to a school via contract with the school's governing board. If the proposed school plans to contract with more than one Service Provider, the application must address the criteria below for each Service Provider, as applicable.

An application that meets the standard for approval will have the following elements:

1. Service Provider Selection and Track Record

- a. A reasonable explanation of why the applicant is seeking to contract with a Service Provider rather than operate the proposed school(s) directly.
- b. 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.
- c. 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:
 - i. 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;
 - ii. 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

- iii. 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.
- d. 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.
- e. 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.

2. Legal Relationships

- a. 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.
- b. 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.
- c. 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.
- d. 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:

- i. Demonstrate such agreements are separately documented and not part of or incorporated in the proposed school's management contract; and
 - ii. 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.
- e. 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.

3. Service Provider's Organizational Structure

- a. A draft management agreement, provided as **Attachment Q (no page limit)**, that includes:
- i. The duration of the management agreement;
 - ii. Clear roles and responsibilities of the parties;
 - iii. A clear and well-defined scope of services and costs of all resources;
 - iv. A clear compensation structure and payment schedule that identifies all fees, bonuses, and other compensation to be paid to the Service Provider;
 - v. Reasonable conflict of interest provisions that adhere to state law;
 - vi. 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;
 - vii. 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
 - viii. Reasonable indemnification provisions in the event of default or breach by either party.
- b. 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.
- c. 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.

- d. 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.
- e. 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.
- f. A comprehensive and adequate plan for the operation of the proposed school in the event of termination of the management agreement.

I. Conversion Charter School Additional Academic Information

Note: Any applicant planning to open a Conversion Charter School, as described in HRS Chapter 302D, must complete this section. The Commission will consider Strive HI data reported through the DOE to assess the proposed school's track record.

If an applicant believes that a particular criterion in this section is not applicable to its proposal, the applicant should so state and explain why the applicant believes the particular criterion does not apply. If an applicant believes that a particular criterion in this section has been addressed thoroughly in other parts of the Narrative Proposal, reference those sections.

An application that meets the standard for approval will have the following elements:

1. **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.

III. Organizational Plan

A strong Organizational Plan is coherent overall and aligned internally with the school's mission and vision, Academic Plan, and Financial Plan.

A. Governance

The governing board's mission, vision, and philosophy are not separately rated by the evaluators. However, these mission and vision statements should align with the proposed school's mission and vision and other parts of the application.

An application that meets the standard for approval will have the following elements:

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)**.
2. 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.
3. 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.
4. 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.

5. Demonstrated will, capacity, and commitment of current and proposed governing board members to govern the proposed school effectively by providing the following:
 - a. A list of all current and identified proposed school governing board members and their intended roles;
 - b. 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;
 - c. 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
 - d. 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.
 - e. 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.
6. 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).
7. 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.
8. 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.

9. 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.

B. Performance Management

The Commission will evaluate the performance of every charter school annually and for renewal purposes according to academic, financial, and organizational performance standards that are incorporated in the Charter Contract. The academic performance standard considerations include, but are not limited to, Strive HI performance, growth, and comparative performance based on federal, state, Academic Performance Framework, and School-Specific Measures. The financial performance standards are based on standard accounting and industry standards for sound financial operation. The organizational performance standards are based primarily on compliance with legal obligations, including fulfillment of the governing board's fiduciary obligations related to sound governance.

Applicants may propose to supplement Strive HI and the Academic Performance Framework evaluation frameworks with School-Specific Measures. School-Specific Measures are goals and measures that are specific to the proposed school and its unique mission. For further information and guidance, refer to Making the Mission Matter: Charting a Map to School Mission Success by Margaret Lin. It is recommended that applicants limit the number of School-Specific Measures to one or two, since too many goals can become difficult to develop, manage, and measure. Applicants may propose varying targets for years 1 to 5.

An application that meets the standard for approval will have the following elements:

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:
 - a. Academic Performance Data Evaluation Plan. A comprehensive and effective plan and system for:
 - i. 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;
 - ii. 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

- iii. Reporting the data to the school community.
 - b. 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.
 - c. 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.
2. A clear description of thoughtful, appropriate corrective actions the proposed school will take if it falls short of:
- a. 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;
 - b. 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
 - c. 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.
3. 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.

C. Ongoing Operations

An application that meets the standard for approval will have the following elements:

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.

2. 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.
3. 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.

D. Student Recruitment, Admission, and Enrollment

All student recruitment, admissions, and enrollment decisions must be made in a nondiscriminatory manner and without regard to race, color, ethnicity, national origin, religion, sex, sexual orientation, marital status, income level, academic or athletic ability, disability, need for special education services, or lack of proficiency in the English language. The Commission may grant enrollment preferences in accordance with HRS §302D-34.

An application that meets the standard for approval will have the following elements:

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.
2. 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.
3. 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:
 - a. 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;
 - b. A reasonable timeline and comprehensive plan for student recruitment or engagement and enrollment;
 - c. Effective procedures for lotteries, waiting lists, withdrawals, re-enrollment, and transfers in accordance with state and Commission requirements; and
 - d. Descriptions of reasonable pre-admission activities for students and parents or guardians, including an explanation of the purpose of such activities.

E. Parent Involvement and Community Outreach

An application that meets the standard for approval will have the following elements:

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.
2. 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.
3. Effective strategies describing how the proposed school will inform and engage parents or guardians and the community about the proposed school's development.
4. 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.

F. Nonprofit Involvement

Proposed schools are strongly encouraged to designate or establish an associated nonprofit organization to assist with fundraising and other support activities, especially during the start-up period, but this is not a requirement.

An application that meets the standard for approval will have the following elements:

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.
2. 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.

G. Geographic Location and Facilities

The proposed school's geographic location will determine things such as the DOE complex area(s) in which the proposed school is included and the DES that the proposed school will be assigned to for special education purposes. Charter school facilities must comply with applicable state and county health and safety requirements. In addition, charter school applicants must be prepared to follow

applicable county planning review procedures and obtain all necessary certifications, permits, and inspections.

An application that meets the standard for approval will have the following elements:

1. Geographic Location.

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

2. Facilities.

- a. 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.

OR

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.

- b. 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.

H. Start-Up Period

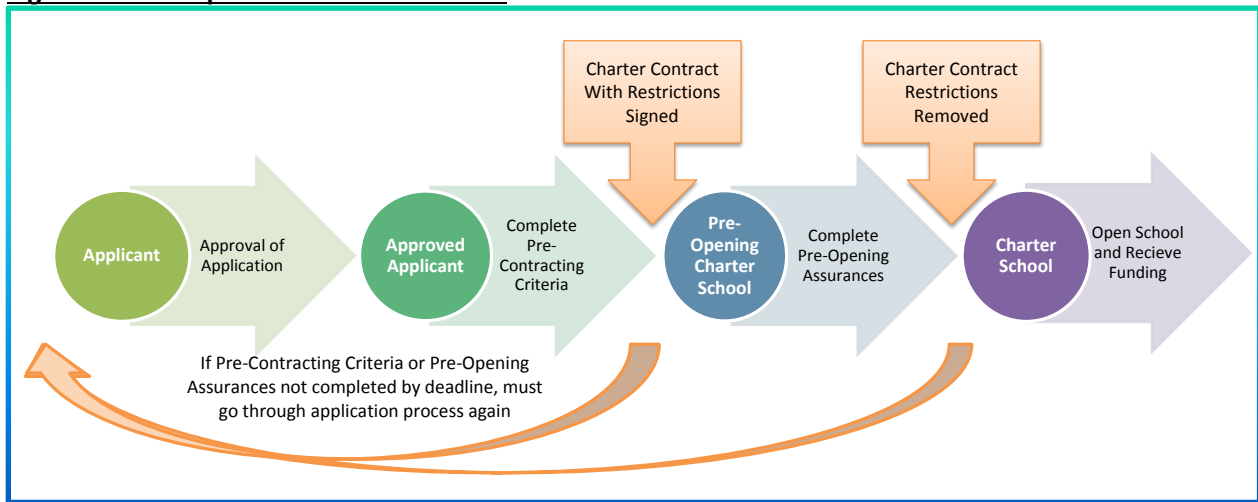
*In accordance with the start-up charter school process, as shown in **Figure 3**, an approved applicant will not be able to hire employees who receive state benefits or receive funding until it completes its Pre-Opening Assurances. Generally, a Pre-Opening Charter School will not complete its Pre-Opening Assurances until a month or two before the school actually opens because these assurances include elements with practical limitations, such as proof of enrollment of the projected student body and facility compliance. The soonest that the first allocation of state per-pupil funding can be released to a charter school, once it has completed its Pre-Opening Assurances, is July 20th.*

Note: The management plan for the start-up year presented in the application will serve as the basis for the Pre-Opening Assurances.

An application that meets the standard for approval will have the following elements:

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:
 - a. 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;
 - b. 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;
 - c. 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;
 - d. 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;
 - e. 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
 - f. 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.
2. 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.

Figure 3: Start-Up Charter School Process



I. Conversion Charter School Additional Organizational Information

Note: Any applicant planning to open a Conversion Charter School, as described in HRS Chapter 302D, must complete this section. Conversion Charter Schools, even after they convert to a charter school, continue to serve as the home school for the former DOE school’s designated DOE geographic area. A Conversion Charter School must accept students living within its DOE geographic area regardless of space or capacity considerations. Students from outside the DOE geographic area may enroll at a Conversion Charter School in accordance with the school’s admission and enrollment policy.

If an applicant believes that a particular criterion in this section is not applicable to its proposal, the applicant should so state and explain why the applicant believes the particular criterion does not apply. If an applicant believes that a particular criterion in this section has been answered thoroughly in other parts of the Narrative Proposal, reference those sections.

An application that meets the standard for approval will have the following elements:

1. School Community

- a. 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.
- b. 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.
- c. 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.

2. Staff Plans and Evaluation

- a. 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.

3. Facilities

- a. 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.

3. Nonprofit Organization as Applicant. *Note: Only applicants proposing a Conversion Charter School where a nonprofit organization will operate and manage the proposed school and the nonprofit organization's board of directors will serve as the Conversion Charter School's governing board need to complete this section.*

- a. 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.
- b. 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.
- c. 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.
- d. 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.
- e. 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.

IV. Financial Plan

A. Financial Oversight and Management

An application that meets the standard for approval will have the following elements:

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.
2. 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.
3. 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.

B. Operating Budget

Charter schools are subject to HRS Chapter 37D and, as agencies of the State, may not enter into financing agreements or take out lines of credit without the approval of the Department of Budget and Finance as to fiscal responsibility and approval from the Department of the Attorney General as to form and legality.

*Note: In developing the proposed school's budget, use the following per-pupil annual revenue projection: **\$6,500**.*

An application that meets the standard for approval will have the following elements:

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.
2. 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:
 - a. 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.

- b.** 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.
- c.** 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.

V. Applicant Capacity

The applicant's capacity is evaluated based on the applicant's individual and collective qualifications (including, but not limited to, documented and relevant credentials and experience reflected in the resumes of all members) and the applicant's demonstrated understanding of challenges, issues, and requirements associated with running a high-quality charter school (including, but not limited to, the application and Capacity Interview responses).

A. Academic Plan Capacity

An application that meets the standard for approval will have the following elements:

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:
 - a. 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
 - b. 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.
2. 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.
3. 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.
4. School Director.

If the school director is known, a description that:

 - a. Identifies the school director;
 - b. Summarizes the school director's academic and organizational leadership record and includes this individual's resume, provided as **Attachment II (no page limit)**;

- c. 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.
- d. 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*.

OR

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

- e. 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
 - f. 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.
5. 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:
- a. 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.

OR

- b. 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.

B. Organizational Plan Capacity

An application that meets the standard for approval will have the following elements:

- 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:
 - a. 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

- b. 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.
- 2. 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.

C. Financial Management Capacity

An application that meets the standard for approval will have the following elements:

- 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:
 - a. 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
 - b. 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.
- 2. 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.

Exhibits

- Exhibit 1: Enrollment Plan
- Exhibit 2: Staffing Chart Template
- Exhibit 3: Statement of Assurances Form
- Exhibit 4: Board Member Information Form
- Exhibit 5: School-Specific Measures Template
- Exhibit 6: Financial Plan Workbook

Exhibit 1: Enrollment Plan

Enrollment Plan

Grade Level	Number of Students											
	Year 1		Year 2		Year 3		Year 4		Year 5		Capacity	
	2017		2018		2019		2020		2021		20__	
Brick & Mortar/ Blended vs. Virtual	B&M/ Blended	Virtual	B&M/ Blended	Virtual	B&M/ Blended	Virtual	B&M/ Blended	Virtual	B&M/ Blended	Virtual	B&M/ Blended	Virtual
K												
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
Subtotals												
Totals												

Exhibit 2: Staffing Chart Template

Staffing Chart

Use the appropriate table below to outline the staffing plan for the proposed school. Adjust or add functions and titles and add or delete rows as needed. Include the salary and full-time employee (“FTE”) equivalency (*e.g.*, 1.0 FTE, 0.5 FTE, etc.) for each position for each year.

Elementary School Staffing Model and Rollout

Title	Salary and FTE Per Position Per Year					Capacity 20__
	Year 1 2017	Year 2 2018	Year 3 2019	Year 4 2020	Year 5 2021	
School Director						
Assistant School Director						
Add'l School Leadership Position 1 [specify]						
Add'l School Leadership Position 2 [specify]						
Add'l School Leadership Position 3 [specify]						
Classroom Teachers (Core Subjects)						
Classroom Teachers (Specials)						
Student Support Position 1 [specify: <i>e.g.</i> , Social Worker]						
Student Support Position 2 [specify]						
Specialized School Staff 1 [specify]						
Specialized School Staff 2 [specify]						
Teacher Aides and Assistants						
School Operations Support Staff						
Total FTEs						
Total Salaries						

Middle School Staffing Model and Rollout

Title	Salary and FTE Per Position Per Year					Capacity 20__
	Year 1 2017	Year 2 2018	Year 3 2019	Year 4 2020	Year 5 2021	
School Director						
Assistant School Director						
Add'l School Leadership Position 1 [specify]						
Add'l School Leadership Position 2 [specify]						
Add'l School Leadership Position 3 [specify]						
Classroom Teachers (Core Subjects)						
Classroom Teachers (Specials)						
Student Support Position 1 [specify: <i>e.g.</i> , Social Worker]						
Student Support Position 2 [specify]						
Specialized School Staff 1 [specify]						
Specialized School Staff 2 [specify]						
Teacher Aides and Assistants						

School Operations Support Staff						
Total FTEs						
Total Salaries						

High School Staffing Model and Rollout

Title	Salary and FTE Per Position Per Year					Capacity 20__
	Year 1 2017	Year 2 2018	Year 3 2019	Year 4 2020	Year 5 2021	
School Director						
Assistant School Director						
Dean(s)						
Add'l School Leadership Position 1 [specify]						
Add'l School Leadership Position 2 [specify]						
Add'l School Leadership Position 3 [specify]						
Classroom Teachers (Core Subjects)						
Classroom Teachers (Specials)						
Student Support Position 1 [specify: <i>e.g.</i> , Social Worker]						
Student Support Position 2 [specify]						
Specialized School Staff 1 [specify]						
Specialized School Staff 2 [specify]						
Teacher Aides and Assistants						
School Operations Support Staff						
Total FTEs						
Total Salary						

Exhibit 3: Statement of Assurances Form

Statement of Assurances

Please print this form, and initial each item in the box provided. The form must be SIGNED by an authorized representative of the Applicant Governing Board.

The Applicant Governing Board agrees to comply with all of the following provisions, specifically, if approved the governing board and school:

- will operate in compliance with all applicable state and federal laws, including, but not limited to, HRS Chapter 302D;
- will operate as a public, nonsectarian, non-religious public school with control of instruction vested in the governing board of the school under the general supervision of the Commission and in compliance with the Charter Contract and HRS Chapter 302D;
- will operate in accordance with and comply with all of the requirements of Master Collective Bargaining Agreements, pursuant to HRS Chapter 89, and negotiate any supplemental agreements necessary;
- will, for the life of the Charter Contract, participate in all data reporting and evaluation activities as requested by the U.S. Department of Education and the Hawaii Department of Education, including participation in any federal or state funded charter school evaluations or studies, final grant report documentation, and financial statements;
- will provide special education services for students as provided in Title 49, Chapter 10, and Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, and Part B of the Individuals with Disabilities Education Act;
- will ensure that a student's records and, if applicable, a student's individualized education program, as defined in Section 602(11) of the Individuals with Disabilities Act, will follow the student, in accordance with applicable law (P.L. 107-110, section 5208);
- will comply with all provisions of Elementary and Secondary Education Act, including, but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice Option, the Family Educational Rights and Privacy Act, and assessments [P.L. 107-110];
- will follow all federal and state laws and constitutional provisions prohibiting discrimination on the basis of disability, race, creed, color, national origin, religion, ancestry, or need for special education services, including, but not limited to, the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, and Part B of the Individuals with Disabilities Education Act;
- will adhere to all provisions of federal law relating to students who are limited English proficient, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974, that are applicable to it;
- will ensure equitable program participation, as required under Section 427 of the General Education Provision Act;
- will follow any federal and state court orders in place in the local school district;
- will comply with federal and state applicable health and safety standards;

- will permit the Commission to audit, review, and inspect the operator’s activities, books, documents, papers, and other records;
- will comply with all federal and state audit requirements and ensure that arrangements have been made to finance those mandatory audits;
- will employ individuals to teach who hold a license to teach in a public school in Hawaii or meet the minimum requirements for licensure as defined by the State Board of Education;
- will operate on a July 1 to June 30 fiscal year and will adopt and operate under an annual budget for such fiscal year;
- will maintain its accounts and records in accordance with generally accepted accounting principles;
- will prepare and publish an annual financial report that encompasses all funds and includes the audited financial statements of the charter school; and
- will read, understand, and agree to comply with all parts of the Charter Contract, including, but not limited to, the performance standards and requirements established by the Charter Contract and attached performance framework.

Certification

Name of Proposed School: _____

Name of Authorized Representative: _____

I, the undersigned, do hereby agree to the assurances contained above.

Signature of Authorized Representative Date

Exhibit 4: Board Member Information Form

Board Member Information

**To be completed individually by each Applicant Governing Board member.
All forms must be signed by hand.**

Serving on a public charter school governing board is a position of public trust and fiduciary responsibility. As a governing board member of a public school, you are responsible for ensuring the quality of the school's plans, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its Charter Contract.

As part of the application for a new charter school, the Commission requests that each prospective governing board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the team behind each school proposal in advance of the applicant interview; and 2) to encourage governing board members to reflect individually, as well as collectively, on their common mission, purposes, and obligations at the earliest stage of school development. Please add the full name of your school to the footer of this document so that it appears on all pages.

Background

1. Name of charter school on whose governing board you intend to serve:
2. Contact information:
Name:
Phone:
E-mail:
3. Describe your educational and employment history. No narrative response is required if a resume and professional biography are attached.
 Resume and professional bio are attached to this form.
4. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school, or any nonprofit organization.
 Does not apply to me Yes
5. Why do you wish to serve on the governing board of the proposed charter school?
6. What is your understanding of the appropriate role of a public charter school governing board member?
7. Describe any previous experience you have that is relevant to serving on the charter school's governing board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.
8. Describe the specific knowledge and experience that you would bring to the governing board.

School Mission and Plan

1. What is your understanding of the school's mission and guiding beliefs?
2. What is your understanding of the school's proposed academic plan?
3. What do you believe to be the characteristics of a successful school?
4. How will you know that the school is succeeding or is not succeeding in its mission?

Governance

1. Describe the role that the governing board will play in the school's operation.
2. How will you know if the school is successful at the end of the first year of operation?
3. How will you know at the end of five years if the school is successful?
4. What specific steps do you think the governing board will need to take to ensure that the school is successful?
5. How would you handle a situation in which you believe one or more members of the governing board were acting unethically or not in the best interests of the school?

Disclosures

1. Indicate whether you or your spouse knows the other prospective governing board members for the proposed school. If so, please indicate the precise nature of your relationship.
 I/we do not know these individuals Yes
2. Indicate whether you or your spouse knows any person who is, or has been in the last two years, a school employee. If so, indicate the precise nature of your relationship.
 I/we do not know any such employees Yes
3. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee, or agent of an entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.
 I/we do not know any such persons Yes
4. Indicate if you, your spouse, or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
 I/we do not anticipate conducting any such business Yes
5. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors, or agents of that provider. If the answer is in the affirmative, please describe any such relationship.
 Not applicable because the school does not intend to contact with an education service provider or school management organization.
 I/we do not know any such persons Yes
6. If the school contracts with an education service provider, please indicate whether you, your spouse, or other immediate family members have a direct or indirect ownership, employment, contractual, or management

interest in the provider. For any interest indicated, provide a detailed description.

N/A. I/we have no such interest Yes

7. If the school plans to contract with an education service provider, indicate if you, your spouse, or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.

N/A I/we or my family do not anticipate conducting any such business Yes

8. Indicate whether you, your spouse, or other immediate family members are a director, officer, employee, partner, or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.

Does not apply to me, my spouse or family Yes

9. Indicate any potential ethical or legal conflicts of interests that would or are likely to exist should you serve on the school's governing board.

None Yes

Certification

I, _____, certify to the best of my knowledge and ability that the information I am providing to the State Public Charter School Commission as a prospective governing board member is true and correct in every respect.

Signature

Date

Exhibit 5: School-Specific Measures Template

School-Specific Measures

School-Specific Performance Goal #1	<i>What is the proposed school's school-specific performance goal #1?</i>
Measure	<i>How will the proposed school assess and demonstrate performance toward this goal?</i>
Metric	<i>How will the proposed school quantify this measure? For Conversion Charter School applicants, is the proposed Conversion Charter School tracking this data now?</i>
Targets	<i>What targets will the proposed school achieve?</i>
Rationale for Goal	<i>Why is this goal important to the proposed school's mission?</i>
Assessment Reliability and Scoring Consistency	<i>How will the proposed school demonstrate both the reliability and scoring consistency of the assessment(s) the proposed school plans to use, if non-standardized?</i>
Baseline Data	<i>What is the proposed school's beginning data point?</i>
Attachments	<i>Provide optional attachments to illustrate the assessment(s). (Note and attach relevant school-developed assessments and/or assessment tools.)</i>

School-Specific Performance Goal #2	<i>What is the proposed school's school-specific performance goal #2?</i>
Measure	<i>How will the proposed school assess and demonstrate performance toward this goal?</i>
Metric	<i>How will the proposed school quantify this measure? For Conversion Charter School applicants, is the proposed Conversion Charter School tracking this data now?</i>
Targets	<i>What targets will the proposed school achieve?</i>
Rationale for Goal	<i>Why is this goal important to the proposed school's mission?</i>
Assessment Reliability and Scoring Consistency	<i>How will the proposed school demonstrate both the reliability and scoring consistency of the assessment(s) the proposed school plans to use, if non-standardized?</i>
Baseline Data	<i>What is the proposed school's beginning data point?</i>
Attachments	<i>Provide optional attachments to illustrate the assessment(s). (Note and attach relevant school-developed assessments and/or assessment tools.)</i>

Exhibit 6: Financial Plan Workbook