

DAVID Y. IGE
GOVERNOR



CATHERINE PAYNE
CHAIRPERSON

STATE OF HAWAII
STATE PUBLIC CHARTER SCHOOL
COMMISSION ('AHA KULA HO'ĀMANA)
1111 Bishop Street, Suite 516, Honolulu, Hawaii 96813
Tel: (808) 586-3775 Fax: (808) 586-3776

RECOMMENDATION SUBMITTAL

DATE OF SUBMITTAL: December 26, 2017

DATE OF MEETING: December 28, 2017

TO: Mitch D'Olier, Chairperson

FROM: Sione Thompson, Executive Director

AGENDA ITEM: III. Discussion/Action on the next Request for Proposal (RFP)

I. DESCRIPTION

Discussion and action on the next Request for Proposal (RFP).

II. POLICY CONTEXT AND AUTHORITY

Charter School Application Process and Schedule: Section 302D-13(c), HRS provides that the charter school application process and schedule shall be determined by the authorizer. Pursuant to Section 320D-13(c)(1), HRS, the authorizer shall publish a request for proposal on its website that at a minimum: presents the authorizer's strategic vision for chartering; includes or directs applicant governing boards to the performance framework developed by the authorizer in accordance with Section 302D-16; HRS includes criteria that will guide the authorizer's decision to approve or deny a charter application; states clear, appropriately detailed questions and provides guidelines concerning the format and content essential for applicant governing boards to demonstrate the capacities necessary to establish and operate a successful charter school; and requires charter applications to provide or describe all essential elements, as determined by the authorizer, of proposed school plans.

Section 302D-13(f), HRS establishes statutory guidelines as to the frequency in which charter applications are solicited by an authorizer and states that, "...nothing in this section shall be construed as requiring an authorizer to accept and review charter applications annually."

The establishment of start-up and conversion charter schools, and the text of that statutory

section, as amended by Act 114, Session Laws of Hawaii 2015, is attached as **Exhibit 1**.

III. BACKGROUND AND DISCUSSION

2016-2017 RFP

The 2016-2017 RFP for new charter schools was approved at the September 8, 2016 general business meeting, and was posted to the Commission website on September 12, 2016. The 2016- 2017 applications cycle ended with the July 13, 2017 general business meeting where the Commission made its final decisions regarding charter applications. The 2016-2017 RFP is attached as **Exhibit 2**.

Approved Applications Process

At the December 14, 2017 General Business Meeting, the Commission approved the below applications cycle process to be used in an upcoming RFP. The approved process is based on the process used in the 2016-2017 RFP, and includes updates to streamline the process.

Task	Description
1. Pre-RFP Orientation	Orientation to be conducted prior to the release of the RFP. The orientation would include a general overview of the RFP and a general discussion on running a state agency.
2. RFP Release	RFP posted to the Commission website.
3. RFP Orientation	Commission staff to conduct a mandatory orientation to interested applicants on the RFP and its requirements.
4. Intent to Apply Packet Due to Commission	As required by Section 302D-13(c)(2), HRS, applicants are required to submit the intent to apply packet to the Commission. Applicants must meet the requirements defined in Section 302D-13(b), HRS in order to be eligible to submit a charter application.
5. Applicants Notified of Eligibility	Based on the intent to apply packet that was submitted by the applicant, Commission staff will determine whether the applicant meets the requirements in Section 302D- 13(b), HRS to submit a charter application. Applicants will be notified on their eligibility to proceed with submitting a charter application.

6. Applications Due to Commission	Section 302D-13(c)(3), HRS, requires the timely submission of a charter application to the authorizer. Applicants who are eligible to submit an application will have 60 days to submit the application to the Commission.
7. Applications Committee- Determine Completeness	Section 302D-13(c)(4), HRS, requires the timely review of the charter application by the authorizer for completeness, and notification by the authorizer to the applicant governing board that the application is complete. The Applications Committee will conduct a completeness check at a scheduled Applications Committee meeting.
8. Application Evaluation Window	The amount of time that the evaluation team will have to review the application. Evaluators will have 15 calendar days to review applications that are submitted.
9. Commission Public Hearing on Charter Applications	Section 302D-13(c)(5)(B), HRS, requires the opportunity in a public forum for the public to provide input on each charter application.
10. Clarification interview	As required by Section 302D-13(c)(5)(A), HRS the evaluation team will conduct an in-person interview with representatives from the applicant governing board.
11. Capacity Interview	Applicants are interviewed by those with experience in leading a school to determine applicant capacity.
12. Applicants Receive Recommendation Reports	Applicants receive the recommendation report written by the evaluation team.
13. Applications Committee Meeting	The Applications Committee will deliberate and make recommendations to the Commission on the approval or denial of charter applications. Section 302D-13(c)(6), HRS requires the approval or denial of a charter application to be made in a meeting open to the public.

<p>14. General Business Meeting- Final Decision</p>	<p>The Commission makes its final decision on the approval or denial of charter applications. Section 302D-13(c)(7), HRS requires the authorizer to set a final date to approve or deny a charter application. Section 302D-13(c)(6), HRS requires the approval or denial of a charter application to be made in a meeting open to the public.</p>
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Feedback on Applications Process and RFP

Staff has received the following feedback on the 2016-2017 applications cycle:

- Reducing the number of time that that applicants appear before the Commission.
- Including in the RFP any elements that have been identified regarding applicants/applications through the strategic planning process.
- Clearly defined roles/responsibilities of those that evaluate applications.
- Flexibility to consider information that is submitted throughout the applications process.
- Comparing current and prior years applications assessments for repeat applicants to ensure consistency.
- Quality assurance processes and training for application evaluations.
- Receiving comments from the applicant school’s Complex Area Superintendent.
- Strong educators added to the evaluation team.
- Utilizing pdfs to disseminate information instead of google drive.

RFP Release Date

For further Committee discussion.

Exhibit 1
Section 302D-13, HRS

Section 302D-13, as amended by Act 114, Session Laws of Hawaii 2015

§302D-13 Start-up and conversion charter schools; establishment. (a) New start-up and conversion charter schools may be established pursuant to this section.

(b) Any community, department school, school community council, group of teachers, group of teachers and administrators, or nonprofit organization may submit a letter of intent to an authorizer to form a charter school and establish an applicant governing board. An applicant governing board may develop a charter application pursuant to this section; provided that:

(1) An applicant governing board established by a community may develop a charter application for a start-up charter school;

(2) An applicant governing board established by a department school or a school community council may develop a charter application for a conversion charter school;

(3) An applicant governing board established by a group of teachers or a group of administrators may develop a charter application for a start-up or conversion charter school; and

(4) A nonprofit organization may:

(A) Establish an applicant governing board that is separate from the nonprofit organization and develop a charter application for a start-up or conversion charter school; or

(B) Establish an applicant governing board that shall be the board of directors of the nonprofit organization and may develop a charter application for a conversion charter school; provided that any nonprofit organization that seeks to manage and operate a conversion charter school shall:

(i) Submit to the authorizer at the time of the charter application bylaws or policies that describe the manner in which business is conducted and policies that relate to the management of potential conflict of interest situations;

(ii) Have experience in the management and operation of public or private schools or, to the extent necessary, agree to obtain appropriate services from another entity or entities possessing such experience; and

(iii) Not interfere in the operations of the department school to be converted until otherwise authorized by the authorizer in consultation with the department.

(c) The charter school application process and schedule shall be determined by the authorizer, and shall provide for and include, at a minimum, the following elements:

(1) The issuance and publication of a request for proposals by the authorizer on the authorizer's internet website that, at a minimum:

(A) Solicits charter applications and presents the authorizer's strategic vision for chartering;

(B) Includes or directs applicant governing boards to the performance framework developed by the authorizer in accordance with section 302D-16;

(C) Includes criteria that will guide the authorizer's decision to approve or deny a charter application;

(D) States clear, appropriately detailed questions and provides guidelines concerning the format and content essential for applicant governing boards to demonstrate the capacities necessary to establish and operate a successful charter school; and

(E) Requires charter applications to provide or describe all essential elements, as determined by the authorizer, of proposed school plans;

(2) The submission of a letter of intent to open and operate a start-up charter school or to convert a department school to a conversion charter school;

(3) The timely submission of a completed charter application to the authorizer; provided that a charter application for a conversion charter school shall include certification and documentation that the charter application was approved by a majority of the votes cast by existing administrative, support, and teacher personnel, and parents of students at the existing department school; provided that:

(A) This vote shall be considered by the authorizer to be the primary indication of the existing administrative, support, and teaching personnel, and parents' approval to convert to a charterschool;

(B) The balance of stakeholders represented in the vote and the extent of support received in support of the conversion shall be key factors, along with the applicant's proposed plans, to be considered by the authorizer when deciding whether to award a charter; and

(C) A breakdown of the number of administrative, support, and teaching personnel, and parents of students who constitute the existing department school and the number who actually participated in the vote shall be provided to the authorizer;

(4) The timely review of the charter application by the authorizer for completeness, and notification by the authorizer to the applicant governing board that the charter application is complete;

(5) Upon receipt of a completed charter application, the review and evaluation of the charter application by qualified persons including but not limited to:

(A) An in-person interview with representatives from the applicant governing board; and

(B) An opportunity in a public forum for the public to provide input on each charter application;

(6) Following the review and evaluation of a charter application, approval or denial of the charter application by the authorizer in a meeting open to the public;

(7) A provision for a final date by which a decision to approve or deny a charter application must be made by the authorizer, upon receipt of a complete charter application; and

(8) A provision that no charter school may begin operation before obtaining authorizer approval of its charter application and charter contract and fulfilling pre-opening requirements that may be imposed by the authorizer, pursuant to section 302D-14.5.

(d) A charter application to become a start-up or conversion charter school shall meet the requirements of this subsection, section 302D-25, and any other requirements set by the authorizer. The charter application shall, at a minimum:

(1) Include plans for a charter school that are likely to satisfactorily meet the academic, financial, organizational, and operational performance indicators, measures, and metrics set forth in the authorizer's performance framework, pursuant to section 302D-16;

(2) Include plans for a charter school that is in compliance with applicable laws; and

(3) Recognizes the interests of the general public.

(e) In reviewing a charter application under this section, an authorizer shall take into consideration the constitution of the applicant governing board, terms of applicant governing board members, and the process by which applicant governing board members were selected.

(f) In reviewing charter applications under this section, an authorizer shall develop a schedule to approve or deny a charter application by the end of the calendar year prior to the opening year of the proposed charter school for purposes of meeting any deadlines to request funding from the legislature; provided that nothing in this section shall be construed as requiring an authorizer to accept and review charter applications annually.

(g) If a conflict between the provisions in this section and other provisions in this chapter occurs, this section shall control.

Exhibit 2
2016-2017 RFP



State Public Charter School Commission 2016-2017 Request for Proposals

Conversion Charter Schools and Start-up Charter Schools (as defined by Chapter 302D, HRS)

Issued: September 12, 2016

**Intent to Apply Packet Due:
October 7, 2016, 12:00 Noon, Hawaii Standard Time**

**Applications Due:
January 20, 2017, 12:00 Noon, Hawaii Standard Time**

For questions, please contact:

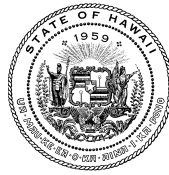
**Lauren Endo
Applications and Start-up Specialist
Email: lauren.endo@spcsc.hawaii.gov**

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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 Hawaii 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 school autonomy and community 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 and charter schools to develop a shared understanding of the issues, improve the charter school environment, and encourage innovative approaches to education. Working together in an environment of mutual respect and support, we can work toward truly maximizing the potential of the charter school movement.

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)

<http://CharterCommission.Hawaii.Gov>
1111 Bishop Street, Suite 516, Honolulu, Hawaii 96813
Tel: 586-3775 Fax: 586-3776

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 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.

We are committed to quality in every aspect of chartering, and 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 demonstrate the academic, financial, and organizational capacity and vision necessary to operate high-performing schools.

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 endeavor, feel free to contact the Commission with any questions you might have regarding the application or the application review. Please direct all questions to Lauren Endo, Applications and Start Up Specialist, at lauren.endo@spcsc.hawaii.gov.

We commend you for your dedication to providing Hawaii’s children with the quality 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.

Every public charter school in Hawaii is a State agency and is guided by a Charter Contract. As such, applicants should read the current [Charter Contract template](#) on the Commission’s website to better understand the requirements and obligations it may be subject to. Following the approval of a proposed charter school’s application, pre-contracting criteria will be set by the Commission. Upon meeting the pre-contracting criteria, the Commission and the newly approved charter school will enter into a charter contract, at which point the applicant will become a pre-opening charter school.

A pre-opening charter school is not yet a full-fledged charter school but is considered a State agency that may receive legal counsel from the Department of the Attorney General and enter into contracts and leases as a State entity. However, a pre-opening charter school is subject to certain restrictions in that it is not entitled to State per-pupil funds and shall not have employees. Section 302D-14.5, HRS requires the Commission to set pre-opening assurances for the pre-opening charter school to ensure that it is prepared to begin operations as a charter school. Only when the pre-opening assurances are met, will the restrictions on the pre-opening charter school be lifted and it can commence operations as a charter school.

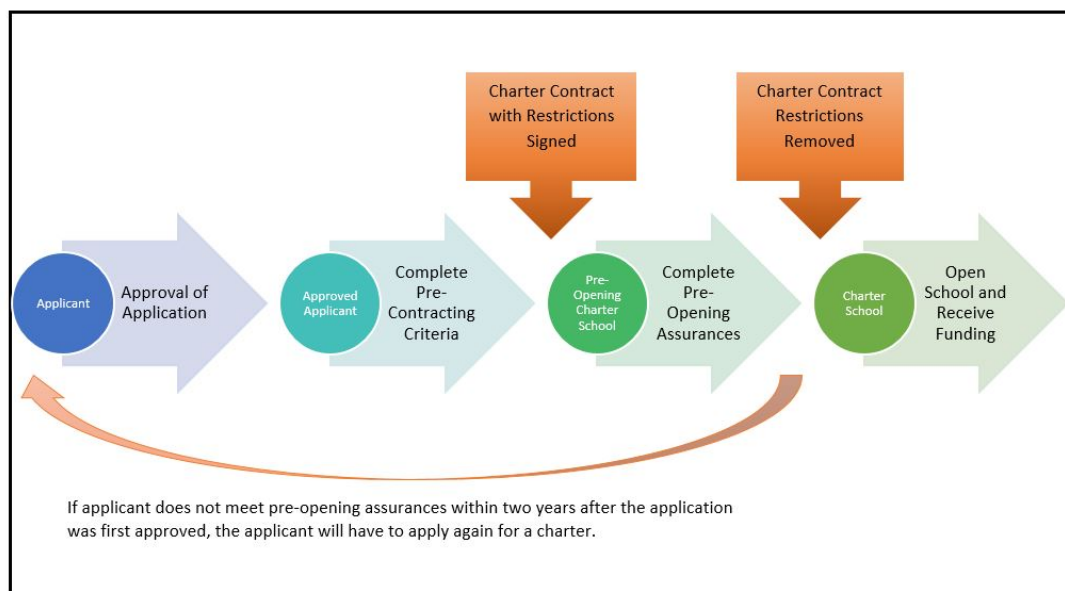


Figure 1: Charter School Start-up Process

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:

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

Two narrative templates are issued for this application cycle: one for Start-up Charter Schools, and one for Conversion Charter Schools. Applicants shall ensure that they are using the correct template for the type of school that they would like to start.

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, that include 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. All charter schools in Hawaii are funded through a per-pupil allocation. Unlike other state agencies, Charter schools are the only state agencies that receive funding that is not restricted in its use. All other state agencies are restricted in the spending of the funds allocated to them by line item (i.e. personnel, equipment, travel, etc.). Although charter schools have autonomy in these areas, they are nevertheless state agencies that shall comply with applicable federal, state, and county laws, ordinances, codes, rules, and regulations. For example, charter schools are subject to collective bargaining agreements between the State and the Hawaii State Teacher’s Association (HSTA), the Hawaii Government Employees Association (HGEA), and the United Public Workers (UPW) union. As a result, the employees and teachers of a charter school are unionized state employees and shall belong to the same collective bargaining units as DOE employees in similar positions. Like all state employees, charter school employees and teachers have access to health and retirement benefits provided by the Hawaii Employer Union Health Benefits Trust Fund (EUTF) and the Employees Retirement System of the State of Hawaii (ERS).

With the autonomy that charter schools are given, comes strong accountability. The governing board of every charter school shall comply with Chapter 84, HRS the State Ethics Code. In addition, charter schools are accountable for meeting academic, financial, and organizational performance standards as described in HRS Chapter 302D and the charter contract:

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 shall 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 both Priority Needs:

- I. 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

- II. 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 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.

D. 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 a *virtual learning* model with face-to-face instruction in a manner such that *virtual 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. *Virtual learning program*: A form of distance education that uses the Internet and computer technologies to connect teachers and students and deliver curriculum with students typically receiving fewer than five hours per week of face-to-face instruction.

E. 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.
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> .
Epicenter	The system that applicants must use to submit intent to apply packets and other components of the application.
ESP	Education Service Provider, specifically an organization, either nonprofit or for-profit, that provides educational design, implementation, or comprehensive management services.
ESSA	The federal Every Student Succeeds Act
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 <u>Exhibit 5</u> .
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 <u>Section III of the Application Requirements and Criteria</u> .
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 <u>Section I.C.</u>
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.
Service Provider	The term used to collectively refer to CMOs, EMOs, and ESPs.
Staffing Chart Template	The form attached as <u>Exhibit 2.</u>
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 <u>Exhibit 3.</u>
Strive HI	Hawaii's Strive HI Performance System.
UIPA	Uniform Information Practices Act, HRS Chapter 92F.

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 12, 2016	Release of RFP
September 30, 2016	RFP Orientation
October 7, 2016 12:00 Noon, Hawaii Standard Time	Intent to Apply Packets Due
October 14, 2016	Prospective applicants are notified of their eligibility to submit an application
January 20, 2017 12:00 Noon, Hawaii Standard Time	Deadline for eligible applicants to submit applications
January 27, 2017	Applicants receive notifications of completeness
January 31, 2017	Deadline for applicants to submit missing information (if applicable)
February 1 through March 29, 2017	Application initial evaluation window
Week of April 3- 7, 2017	Evaluation Team interviews applicants
April 17, 2017	Requests for Clarification are distributed to applicants
May 1, 2017	Deadline for applicants to submit responses to Requests for Clarification
May 11, 2017	Commission holds public hearing on charter school applications
May 22, 2017	Applicants receive Recommendation Reports
June 1, 2017	Deadline for applicants to submit written responses to Recommendation Reports
June 8, 2017	Evaluation Team may submit Rebuttal to Applicant's written response
June 29, 2017	Application Committee Meeting on application decisions
July 13, 2017	Commission General Business Meeting on final application decisions
July 14, 2017	Applicants are notified of the Commission's decision
July 2017-July 2018	New charter school start-up period for approved applications
July 2018	Opening of new charter school

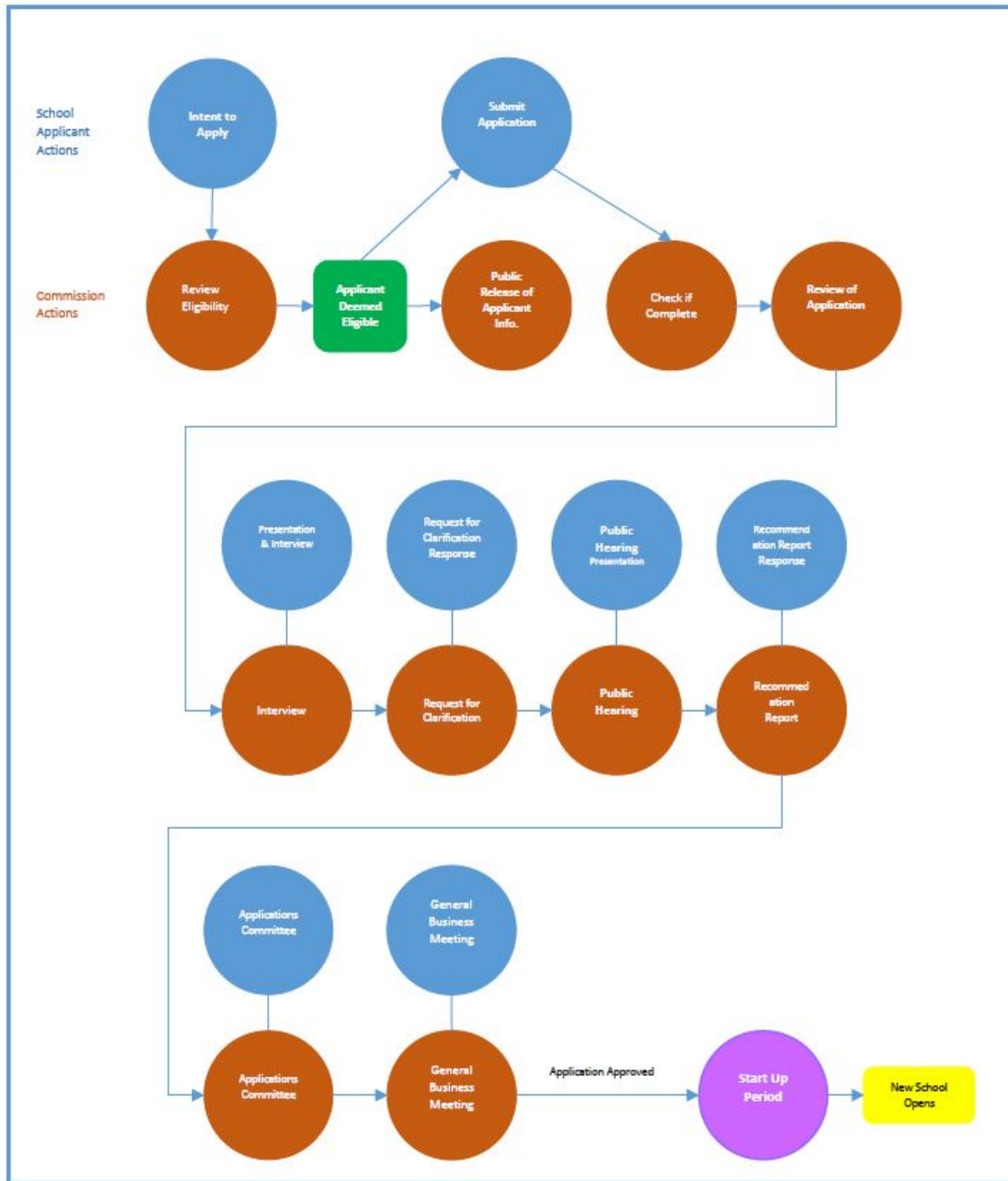


Figure 2: Application Process

Key components of the applications process are described below.

Intent to Apply Packet: All applicants **must** submit the Intent to Apply Packet by the above indicated due date and time. The completed Intent to Apply Packet will be reviewed by Commission staff, and applicants will be notified of the findings by the date indicated in the above schedule. Applicants deemed ineligible will not be permitted to submit an application or continue with the application process.

Interview: As required by Section 302D-13, HRS, applicants must attend an interview with the Evaluation Team. At the interview, applicants shall conduct a ten-minute presentation that covers each of the elements noted in Applicant Information Sheet. Applicants shall be prepared to answer specific questions about their application. The proposed school director, proposed key school personnel, and members of the applicant's governing board shall attend this interview.

Request for clarification: Following the capacity interview, the Evaluation Team may issue a request for clarification by the above indicated date which would direct the applicant to clarify certain elements of their proposal in writing. Applicants will have the opportunity to respond in writing to address questions received from the Evaluation Team by the above indicated due date.

Public hearing: The Commission will hold a public hearing to afford members of the public an opportunity to provide input and comment on each application submitted for the 2016-2017 application cycle. At the public hearing, each applicant shall conduct a ten-minute presentation on their proposed school that covers each of the elements in Applicant Information Sheet. The proposed school director, proposed key school personnel, and members of the applicant's governing board shall attend the public hearing.

Applications Committee Meeting: The Commission's Applications Committee will hold a public meeting to consider the applications received. The Committee will make a recommendation to the full Commission regarding approval or denial of each application.

Commission General Business Meeting: The full Commission will decide whether to approve or deny each application.

Start-up Period: The start-up period encompasses the time between the application first being approved and the new charter school opening its doors. During this time, the applicant will be responsible for completing various tasks to ensure that the school will open such as securing a school facility, recruiting personnel, and finalizing needed policies and procedures. Upon the applicant meeting required pre-contracting criteria, the Commission will enter into a charter contract with the applicant, at which point the applicant will become a pre-opening charter school. All approved applicants will have up to a maximum of two years following the approval of their application to begin operations as a new charter school. Should an approved charter applicant be unable to meet pre-opening assurances within two years, they will need to reapply as a new applicant.

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 I.E](#)) are not considered Components of the Application, and will not be evaluated by the Evaluation Team. However, these elements may be considered by the Commission as described in [Section IV.G](#). How all of these components fit into the Commission's Evaluation Process is set forth in [Figure 3](#).

The following are the Components of the Application that will be evaluated by the Evaluation Team:

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 shall not contain additional narrative unless requested. A list of the mandatory and optional attachments is provided in these guidelines. No additional attachments to those listed are permitted.
4. [Interview](#). The purpose of the interview shall be for Applicants to demonstrate their ability and capacity to open and maintain a *high-quality charter school*, as defined in [Section I.D](#). The interview affords the Evaluation Team to meet proposed school personnel and further their understanding of the application. Applicants are required to conduct a ten-minute presentation that covers each of the elements noted in the Applicant Information Sheet. Applicants shall be prepared to answer specific questions about their application. The proposed school director, proposed key school personnel, and members of the applicant's governing board shall attend this interview.
5. [Request for Clarification](#). Applicants will have the opportunity to respond in writing to specific questions from the Evaluation Team regarding 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.

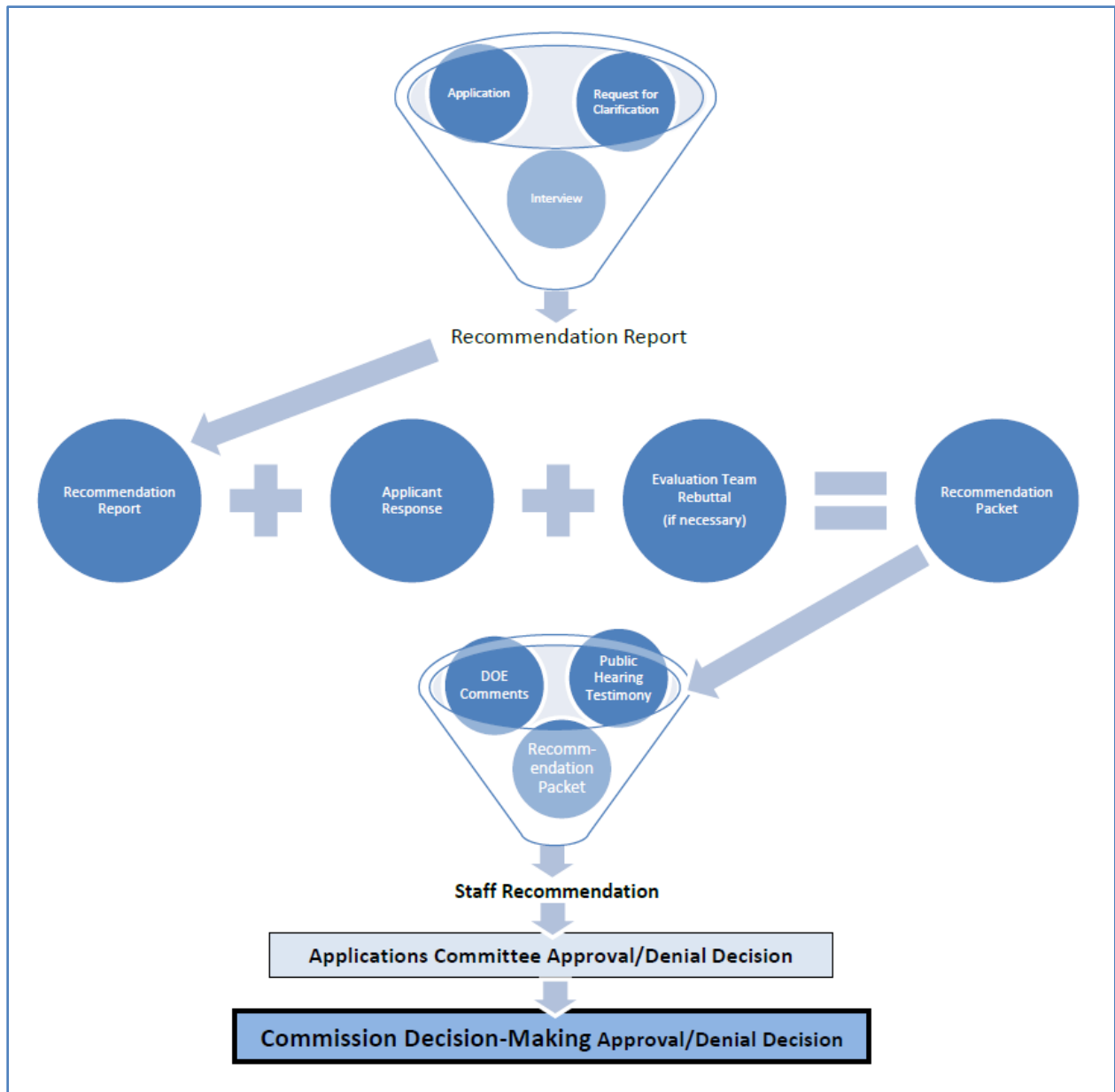


Figure 3: Commission’s Evaluation Process

B. Specifications

Applicants shall use the applicable templates to submit the Intent to Apply Packet, Applicant Information Sheet, Narrative Proposal, attachments, and response to request for clarification through Epicenter. Some of the required attachments may not have a corresponding Commission template. 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. 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.
2. All elements of the application must be submitted in PDF format using the applicable template unless otherwise specified. **An application that contains any handwritten parts other than signatures shall be rejected. This includes labels for attachments.**
3. Every page of the Narrative Proposal must have a page number and the full name of the proposed school in the footer of the document. All attachments must have the full name of the proposed school and a page number that specifically identifies the attachment (*e.g.*, "Attachment A, Page 3" or "A-3"). Applications that do not meet these formatting requirements shall be rejected.

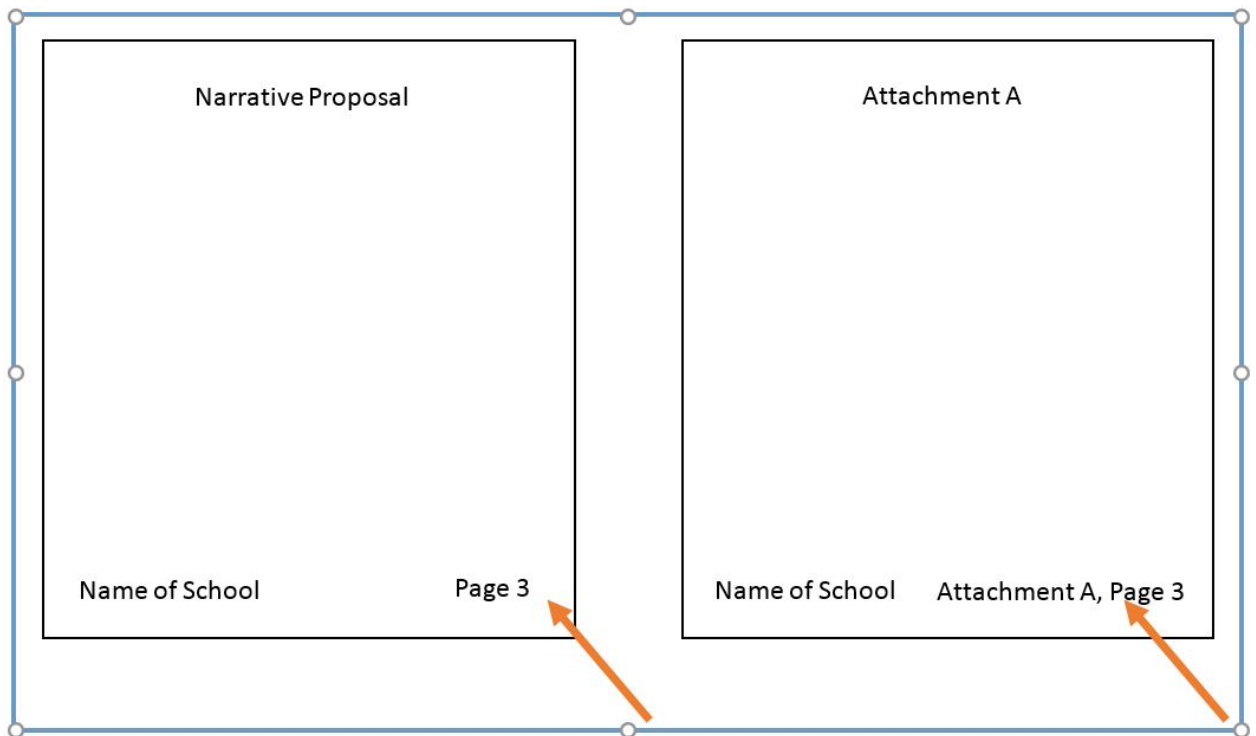


Figure 4: Labeling Format

4. Applicants shall answer the question that appears at the beginning of each template section.
5. 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.

6. When submitting resumes, label each document with the individual's affiliation with the proposed school (e.g., board member, school director, teacher).
7. Review all elements of your application for completeness using the final review checklist (be sure to initial each box) 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.H.
8. Staff will review all written elements of the application for completeness before they are accepted and distributed to the Evaluation Team. 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.
9. Complete all sheets in the Financial Plan Workbook.
10. The following is a list of **mandatory** attachments that shall be submitted with each application. The items in bold (Enrollment Plan, Staffing Chart Template, Statement of Assurances Form, Board Member Information Form, Financial Plan Workbook, and Final Review Checklist) are commission forms that must be used and submitted with each application and appear as exhibits to this RFP. The Applicant shall be responsible for creating the format of the remaining mandatory attachments.

- Enrollment Plan (Exhibit 1)**
- Staffing Chart Template (Exhibit 2)**
- Student's School Day
- Teacher's School Day
- Sample Weekly Student Schedule
- Sample Weekly Teacher Schedule
- Proposed First Year Calendar
- Statement of Assurances Form (Exhibit 3)**
- School governance, management, and staffing organizational charts
- Board Member Information Form (Exhibit 4)**
- Non-Profit Organization's Bylaws or Policies
- Financial Plan Workbook (Exhibit 5)**
- School director's resume
- School director's job description or qualifications
- School leadership and management team's resumes
- School leadership and management team's job descriptions or resumes
- Final review checklist (Exhibit 6)**

11. The following is a list of mandatory and optional attachments to accompany the Narrative Proposal. It is the responsibility of the applicant to ensure it submits all required and relevant attachments. The items in bold print are required to be submitted with each application and may have a Commission template or form that applicants **must** use. The section of the application where the attachment is described is in parentheses. All attachments must 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.** **Student’s school day** (Criterion II.G.2.m)
- Attachment E.** **Teacher’s school day** (Criterion II.G.2.n)
- Attachment F.** **Staffing Chart Template** (Criterion II.F.3.a)
- Attachment G.** Leadership evaluation tool (Criterion II.F.4.d)
- Attachment H.** Teacher evaluation tool (Criterion II.F.4.d)
- Attachment I.** **Proposed First year school calendar** (Criterion II.G.2.l)
- Attachment J.** **Sample weekly student schedule** (Criterion II.G.2.j)
- Attachment K.** **Sample weekly teacher schedule** (Criterion II.G.2.k)
- Attachment L.** Academic performance data for each charter school client of Service Provider (Criterion II.I.1.c)
- Attachment M.** List of charter schools operated or managed by Service Provider (Criterion II.I.1.d)
- Attachment N.** Accreditation report from one school operated or managed by Service Provider (Criterion II.I.1.e)
- Attachment O.** Proposed Service Provider agreement (Criterion II.I.2.d)
- Attachment P.** **Statement of Assurances**
- Attachment Q.** **School governance, management, and staffing organizational charts** (Criterion III.A.3)
- Attachment R.** **Board Member Information Forms** for each member (Criterion III.A.7.c)
- Attachment S.** Admission and enrollment policy (Criterion III.D.3)
- Attachment T.** Evidence of community support (Criterion I.C.4)
- Attachment U.** Start-up project management plan (Criterion III.F.1)
- Attachment V.** Certification and supporting documentation for conversion application approval (Criterion III.G.1.a)
- Attachment W.** Additional evidence of support of or opposition to conversion (Criterion III.G.1.c)
- Attachment X.** **Nonprofit organization’s bylaws or policies (business and conflict of interest)** (Criterion III.G.4.b)
- Attachment Y.** **Financial Plan Workbook** (Criterion IV.B.1) All schools should report in the same way. Put in current template in the application, and make these requirements.
- Attachment Z.** Evidence of commitment for funds (Criterion IV.B.2.a)
- Attachment AA.** Evidence of support from essential planning and implementation partners (Criterion V.A.3)
- Attachment BB.** **School director’s resume** (Criterion V.A.4.c)
- Attachment CC.** **School director’s job description or qualifications** (Criterion V.A.4.a-b)

- Attachment DD.** School leadership and management team’s resumes (Criterion V.A.5.c)
- Attachment EE.** School leadership and management team’s job descriptions or qualifications (Section V.A.5.a-b)
- Attachment FF.** Final Review Checklist

C. Submission Instructions

The Intent to Apply Packet, Applicant Information Sheet, Narrative Proposal, attachments, and response to the Request for Clarification shall be submitted through Epicenter. The Intent to Apply Packet, Applicant Information Sheet, Narrative Proposal, attachments, and response to the Request for Clarification are individual files that need to be uploaded to Epicenter in the proper file format. **If a confirmation message does not appear on your screen after attempting to submit the Intent to Apply Packet, Applicant Information Sheet, Narrative Proposal, attachments, or response to the Request for Clarification, it may not have been submitted.** You should also save a copy of every document submitted as part of this applications process for your own records.

1. Prepare the application using the templates established by the Commission. The **primary contact** of the applicant governing board needs to register and log into the Commission’s Epicenter site. The Intent to Apply Packet, Applicant Information Sheet, Narrative Proposal, attachments, and response to the Request for Clarification will be submitted through this account. Applicants shall contact Lauren Endo, by email at lauren.endo@spcsc.hawaii.gov by September 28, 2016 to receive access to Epicenter.
2. The Intent to Apply Packet must be completed and submitted through the Commission’s Epicenter site by 12:00 Noon, Hawaii Standard Time, on October 7, 2016. **Late submissions will be rejected.** If you do not submit your intent to apply by 12:00 Noon, Hawaii Standard Time, you will not be able to apply for this cycle. **No exceptions will be made.**
3. The Commission will review the Intent to Apply Packet and will notify each applicant of their eligibility to apply by October 14, 2016.
4. If you are deemed eligible to apply, ensure all required fields within the Applicant Information Sheet and the Narrative Proposal are completed and all required attachments are uploaded, and submit the application through the Commission’s Epicenter site by 12:00 Noon, Hawaii Standard Time, on January 20, 2017. **Late submissions will be rejected. No exceptions will be made.** **Once the application is submitted, no changes may be made to the submittal.**
5. The Narrative Proposal must be submitted through the Commission’s Epicenter site as a PDF file. All other attachments must be submitted through the Commission’s Epicenter 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. 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.

The Applicant Information Sheet will be posted to the Commission’s website for public review. The information contained in the Applicant Information Sheet will be the only publicly released information during the course of the applications process.

E. 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.

F. 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.

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

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.

educate children. The Commission also understands that CMOs, EMOs, and ESPs may use their own intellectual property, which is appropriate and acceptable.²

G. Application Evaluation Process

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

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 out-of-state 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 for approval or denial 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.
- 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 a written response to the Recommendation Report ("**Applicant Response**"), and the Evaluation Team will have the option 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 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.H.

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

H. 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 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.

I. 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 I.D.](#)

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



State Public Charter School Commission 2016-2017 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"/>	2. Community group
<input type="checkbox"/>	3. Group of teachers
<input type="checkbox"/>	4. Group of teachers and administrators
<input type="checkbox"/>	5. DOE school (conversion charter school applications only)
<input type="checkbox"/>	6. School community council (conversion charter school applications only)
<input type="checkbox"/>	7. 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. A resolution from the Applicant Governing Board approving the execution of the Intent to Apply Packet
<input type="checkbox"/>	4. 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"/>	5. Copy of the Articles of Incorporation for the nonprofit (applicable only if applicant type is nonprofit organization)
<input type="checkbox"/>	6. 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"/>	7. A resolution from the nonprofit's board approving the establishment of an Applicant Governing Board (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> :	
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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 (2018-2019)		
Year 2 (2019-2020)		
Year 3 (2020-2021)		
Year 4 (2021-2022)		
Year 5 (2022-2023)		
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 <i>(if applicable)</i>	
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 2016-2017 Applicant Information Sheet

APPLICANT INFORMATION SHEET

I. Applicant Summary

Proposed School	
Name:	
Opening Year:	
Geographic Location:	
Grades Served Year 1:	
Grades Served at Capacity:	
Mission:	
Vision:	
What unique educational opportunities will your school provide?	
Describe the key components of the educational model, including a brief explanation of how it will drive success for the identified student population.	
Describe the expected outcomes for the students in both the short run—after they graduate from your school—and in the long run as adults.	
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 a *virtual 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 a *virtual learning* model, as defined in the RFP, with face-to-face instruction in a manner such that the virtual learning activities enhances and/or transforms the instructional model?

Yes No

4. Does the proposed school use *virtual 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.I of the Application Requirements and Criteria.



State Public Charter School Commission 2016-2017 Application Requirements and Criteria

APPLICATION REQUIREMENTS AND CRITERIA

I. School Overview

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

Include following elements in your executive summary:

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 and Anticipated Student Population. Briefly describe the geographic location and, if known, the address of the facility the proposed school plans to use. Describe the anticipated student population of the area, the students' anticipated educational needs, and the non-academic challenges the proposed school is likely to encounter. Describe what contribution the school will bring to the area.
4. What unique educational opportunities will your school provide?
5. The key components of the educational model, including a brief explanation of how it will drive success for the identified student population.
6. The expected outcomes for the students in both the short run—after they graduate from your school—and in the long run as adults.
7. Community Engagement. Briefly describe how the applicant has assessed the demand and solicited support for the proposed school within the community that the school will be located. Include a description of any significant relationships or local community partnerships that have been established to generate community engagement and support for the proposed school. Applicants shall discuss their knowledge of the community in which the school will be located,

and include in this discussion their understanding of the cultural and historical elements of the area as a whole.

8. **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.
9. **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.
10. **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 *virtual learning* experience. These terms are defined in Section I.D of the RFP and depicted in **Figure 5** 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)**.

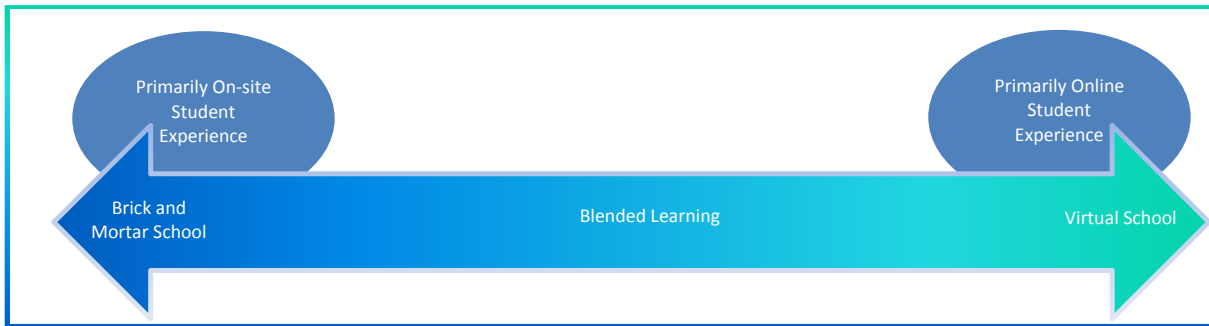


Figure 5: Virtual and Blended Learning Continuum

C. Parent Involvement and Community Outreach

1. This section should include the following elements: 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 T (no page limit)**, such as letters of intent or commitment, memoranda of understanding, and/or contracts.

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.

What are the key components of the educational model?

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 I.D 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 that if achieved at the high school level, will ensure a student graduates with the competencies, skills and content knowledge to be successful in any post-secondary education opportunities he or she may seek to pursue, and if achieved at the elementary or middle school level, will situate the student to achieve academic success at the next level of his or her academic career.
2. A clear description of the rigorous academic standards that will be used at the proposed school including:

- a. A rationale for inclusion each set of standards that the 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; and
 - b. A clear articulation of how the standards based curriculum will be aligned to standards-based instruction, standards-aligned formative and summative assessments and standards-based grading and reporting of student progress.
- 3. A reasonable and sound timeline and description of how instructional materials will be developed or selected and a list of individuals that will be involved in the development or selection process. If the instructional materials have been selected, a description and explanation that clearly demonstrates how the materials support the Academic Plan. If the proposed Academic Plan includes a *virtual or blended learning program*, include a clear description of the virtual 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 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 virtual 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 appropriate for the anticipated student population and clearly demonstrates that all students receive adequate support, including:
 - i. State the number of anticipated students that will access either a blended model, and/or a virtual program at your proposed school.
 - 1. For students accessing the virtual program, indicate the number of hours per month the student will access the virtual or distance learning program outside of your school's site.
 - ii. A description of the general organization of the *virtual 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 supports classroom instruction;
 - iv. A description of the teacher's role, the role of any non-teacher faculty members (paraprofessionals, counselors, parent instructional coaches), the student's role and the parents' role in any virtual learning program.
 - v. Describe what, if any, additional responsibilities will be required of teachers in the virtual environment (course development/design, research, website maintenance) and describe how the school will communicate these responsibilities to teachers. Describe how the school will provide professional development appropriate to the delivery method used.
 - vi. A plan for orientation for prospective and enrolled students, their parents, and their instructional coaches on the course delivery model prior to the beginning of the school year.
 - vii. A description of the degree of support provided to students using any *virtual learning* program (*e.g.*, little or no support, school based mentoring support, school or home mentoring support).
 - viii. Describe whether a student enrolled in the virtual school can be enrolled in credit bearing instructional activities at another institution.
 - ix. A description of the student to teacher ratio in the *virtual 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 *virtual learning* curriculum, including both the student and teacher user interfaces.
- c.** Describe whether students will be required to regularly or periodically attend your school facility. Specify such requirements and describe the facility.
- d.** Describe how the school will ensure or facilitate student attendance at in-person school activities.
- e.** An explanation of how the proposed school will define, monitor, verify, and report student attendance, 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.
- f.** A description of the proposed school's virtual attendance policy.
- g.** Describe the virtual and blended learning program's policies regarding truancy, absence, withdrawal, credit recovery, and dual enrollment.
- h.** Describe the intervention the school will take when students are not logging in and/or completing coursework as required.
- i.** A sound plan for administering and proctoring mandated assessments, including a reasonable budget that is reflected in the Financial Plan Workbook.
- j.** Describe the plan and method for the administration of all required state assessments.
- k.** 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. Describe procedures to ensure the integrity and authenticity of student work product and assessment scores, including the use of an academic honesty and computer acceptable use policy. Describe the intervention to be used when students fail to provide authentic work product or assessment responses. Describe the role that parents will have in promoting accountability.
- l.** Describe the data retention, security, acceptable use, electronic communication, and confidentiality policies.
- m.** 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).
- n.** Describe how the school will provide for the health and safety of students in both online and offline activities.
- o.** Describe how the school will administer required health screenings to students in virtual programs.
- p.** 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. Describe the scope of technical support that will be provided, including where

support staff will be located, and the hours (including weekends and holidays) and manner in which support will be accessible to students and school employees.

- q. Describe procedures to deliver instruction when equipment, software, or connectivity at any location is lost or impaired. Specify who will pay for internet connectivity, and address minimum bandwidth and a course of action for any areas of the state that do not have the minimum bandwidth.
- r. Describe data protection and recovery procedures in event of catastrophic system failure (including offsite system backup).
- s. Describe all technological equipment and services that the school will provide, including hardware, software, connectivity, and media storage devices, and property controls and equipment tagging that will be in place. Specify any equipment or technological support that students or families will be responsible for purchasing or obtaining.
- t. 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.)
- u. Describe how the virtual program will provide services to all enrolled students with exceptionalities, regardless of where the student resides.
- v. Describe the virtual program's procedures for Individual Education Plan (IEP) meetings, including determining where such meetings will occur.
- w. Describe how the virtual program will implement ADA and Rehabilitation Act standards for accessibility to web-based curricula.
- x. Indicate the nature, frequency, and location of all required in-person meetings between parents and school faculty/administration, such as parent-teacher conferences, parent-teacher meetings, field trips, etc.
- y. Indicate the nature and frequency of all optional opportunities for in-person meetings and interactions such as open houses and school community meetings.
- z. Describe the procedures for parents to contact virtual charter school faculty and administrators with concerns of any nature and the procedures and required timelines for prompt and helpful responsiveness to such communications.
- aa. Describe how the school will provide adequate, timely, and appropriate technical support to students, teachers, facilitators, and instructional coaches.
- bb. Describe whether training opportunities to parents and guardians will be available.
- cc. Describe how parents access student grades and understand student progress.

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 or from a fully or partially virtual 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. Academic 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.

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

- 1. Comprehensive and effective plans for evaluating and monitoring academic 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.

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.

E. 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. The plan should explain the types of activities that the proposed school will engage in to create the school culture.
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. 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.

F. 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.F.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.

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 F (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 is highly effective in accordance with the state's plan under the Every Student Succeeds Act ("ESSA") 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 virtual learning teachers that have the requisite subject-matter knowledge, technological proficiency, communication skills, and other capabilities necessary to teach effectively in the virtual 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 G (no page limit)** and any teacher evaluation tool(s) as **Attachment H (required attachment, 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. 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 school is in session, hours of instruction, holidays, days off and half days, professional development days, summer programming and/or instruction, first and last days of class and organization of the school year (quarters, semesters, trimesters,) including the beginning and ending of each segment provided as **Attachment I (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. Clear information about how teachers' work will be organized on a weekly or annual basis, including teacher planning time and professional development. The number of hours or minutes in a day for teacher planning time.
 - g. Clear information about the length of the school day and year, including summer school and time allocated for teacher professional development.

- h. A school calendar and student schedule which provides at least as much core instructional time during a school year as required of other public schools.
- i. Explain any aspects of the school year that are not evident on the calendar or would benefit from further elaboration.
- j. Provide as **Attachment J (required attachment, no page limit)**, a sample weekly student schedule for at least one grade that is representative of each level the school intends to operate (lower elementary, upper elementary, middle, and/or high school). If scheduling structures are unique to each grade, please provide a sample schedule for each grade.
- k. Provide as **Attachment K (required attachment, no page limit)**, a sample weekly teacher schedule for at least one grade that is representative of each level the school intends to operate. If scheduling structures are unique to each grade, please provide a sample for each grade. Present a typical week of instruction, including: length of the teacher's work day, supervisory time, planning periods, professional development, and any other duties the teacher performs in a given day.
- l. Provide as **Attachment I (required attachment, no page limit)**, a copy of the proposed school calendar for year one of the school's operations that clearly demonstrates: days that school is in session, holidays, days off and half days, professional development days, summer programming and/or instruction, first and last days of class and organization of the school year (quarters, semesters, trimesters,) including the beginning and ending of each segment.
- m. A clear description, provided as **Attachment D (required attachment, 1 page limit)**, of a school day from the perspective of a student (from their entry into the building to their exit) 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.
- n. A clear description, provided as **Attachment E (required attachment, 1 page limit)**, of a 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.

H. 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.

I. 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 L (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 M (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 N (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 O (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 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.
- b. 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.
- c. 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.
- d. 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.

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

J. 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.

Describe an organizational plan that will incorporate a strong governance and oversight model that will facilitate both your academic and financial plans.

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. 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. 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, a clear and concise description of the governance philosophy that will guide the proposed school governing board.
2. A description of the responsibilities of the governing board as a whole, its working relationship with the proposed school, and a description of the roles and responsibilities that each member of the governing board will have (i.e. Chairperson, Vice Chairperson, Treasurer, Secretary).
3. Organizational charts, provided as **Attachment Q (required attachment, 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.
4. 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.

5. If the proposed school has a *virtual or blended learning program*, a clear description of the role the governing board will play in the virtual learning program that ensures the effective oversight of the virtual learning program, including a clear and realistic description of the requisite knowledge of virtual learning that the proposed governing board currently possesses or will endeavor to possess.
6. If the membership of Applicant Governing Board has changed from the time it submitted its Intent to Apply Packet, a reasonable explanation justifying the membership changes;
7. 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 R (required form; no page limit)**, that demonstrates board members share a vision, purpose, and expectations for the proposed school;
 - 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; and
 - e. If the current Applicant Governing Board will transition 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.
8. 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).

9. 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.
10. 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.
11. 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.
12. 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.
13. Discuss the procedures to be followed in the event of closure or dissolution of the school. Identify procedures to be followed in the case of the closure or dissolution of the charter school, including provisions for the transfer of students and student records to the complex area in which the charter school is located and for the disposition of the school's assets to the State Public Charter School Commission (SPCSC). Provide assurance that the school will follow any additional procedures required by SPCSC to ensure an orderly closure and dissolution process, including compliance with the applicable requirements of Hawaii Revised Statutes [§302D-19](#).

B. Organizational 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 organizational performance standards are based primarily on compliance with legal obligations, including fulfillment of the governing board's fiduciary obligations related to sound governance.

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

1. Comprehensive and effective plans for evaluating and monitoring organizational performance that explain how the proposed school will measure and evaluate performance data, including:
 - a. 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. 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.

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. If the proposed school will not provide daily transportation, what were the factors that led to this decision and what was the impact of not providing transportation?
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. If the proposed school will not provide food service, what were the factors that led to this decision and what will be the impact of not providing food service?

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 S (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;
 - d. Descriptions of reasonable pre-admission activities for students and parents or guardians, including an explanation of the purpose of such activities;
 - e. A description of how the school will ensure that it will meet its enrollment targets; and
 - f. A contingency plan if enrollment targets are not met.

E. 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.

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.E.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.

F. Start-Up Period

*In accordance with the start-up charter school process, as shown in **Figure 6**, 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 U (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.E.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.F.4, and delivering the professional development, described in Criteria II.F.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.7.d, the governing board transition plan described in Criterion III.A.7.e, and any governing board training described in Criterion III.A.10, 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.

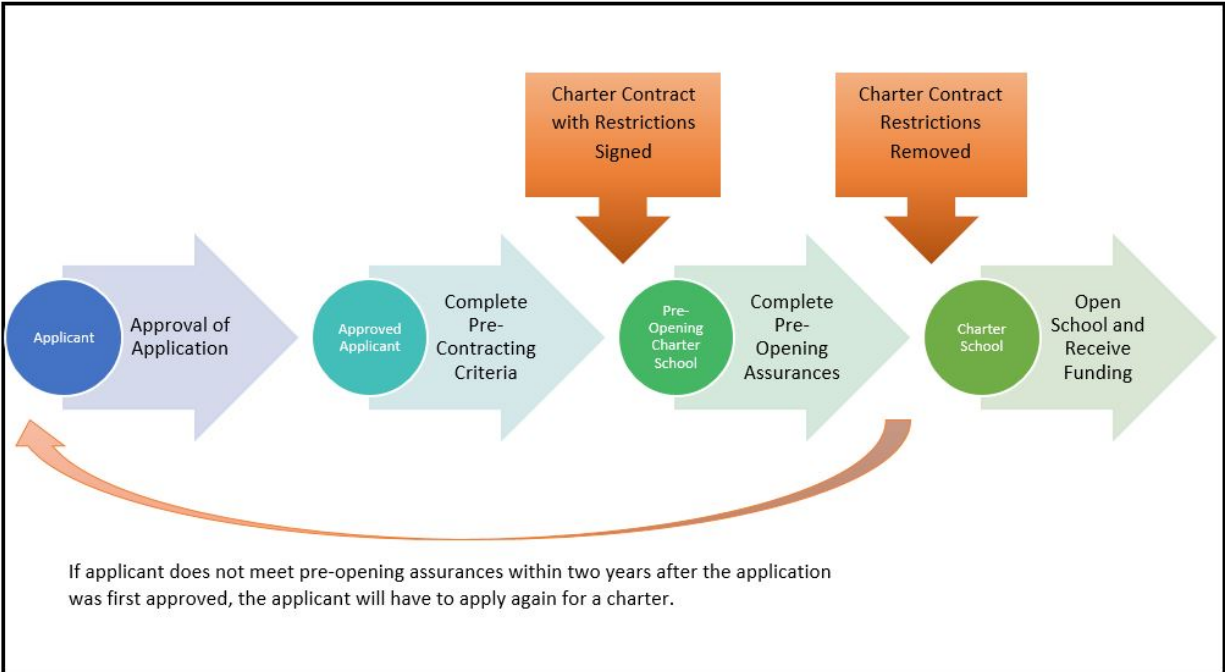


Figure 6: Start-Up Charter School Process

G. 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 V (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 W (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.

4. 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 X (required attachment, 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 strong Financial Plan is coherent overall and aligned internally with the school's mission and vision, Academic Plan, and Organizational Plan.

Describe a financial plan that will sustain your academic plan and operations.

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 5) as **Attachment Y (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 Z (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.

C. Financial 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 financial performance standards are based on standard accounting and industry standards for sound financial operation.

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

1. Comprehensive and effective plans for evaluating and monitoring financial performance that explain how the proposed school will measure and evaluate performance data, including:
 - a. 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.
2. A clear description of thoughtful, appropriate corrective actions the proposed school will take if it falls short of:
 - a. 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.

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).

How do the qualifications and accomplishments of your school's leadership team and governing board members demonstrate an ability to open and manage a high quality school?

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 AA (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.

Submit a position description for the school director. The applicant is required to provide the position description as **Attachment CC (required attachment, no page limit)**. The position description shall include:

- a. The job description, responsibilities, characteristics, and qualifications for the school director. The position description shall include rigorous criteria 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
- b. A 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.

Submit **Attachment BB** to indicate that the school director is known or unknown at the time of the application.

- c. If known, identify the school director, and provide as **Attachment BB (required attachment, no page limit)** the school director's resume including their academic and organizational leadership record.

5. Management Team.

Submit position descriptions for a business manager and registrar (or positions that will carry out the duties of a business manager and registrar). These positions will make up the proposed school's leadership or management team beyond the school director. The applicant is required to provide the position descriptions as **Attachment EE (required attachment, no page limit)**. The description must include:

- a. The job description, responsibilities, characteristics, and qualifications for the business manager and registrar. The position description shall include rigorous criteria that is designed to recruit individuals for these positions that have the experience and ability to perform the duties of each position.
- b. A 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.

Submit **Attachment DD (required attachment, no page limit)** to indicate that the business manager and registrar is known or unknown at the time of the application.

- c. If known, identify the individuals who will fill these positions and provide, as **Attachment DD (required attachment, 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.

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 AA** (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 AA** (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.** Financial Plan Workbook
- Exhibit 6.** Final Review Checklist

Exhibit 1: Enrollment Plan

Enrollment Plan

Grade Level	Number of Students											
	Year 1		Year 2		Year 3		Year 4		Year 5		Capacity	
	2018		2019		2020		2021		2022		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 2018	Year 2 2019	Year 3 2020	Year 4 2021	Year 5 2022	
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 2018	Year 2 2019	Year 3 2020	Year 4 2021	Year 5 2022	
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						

Title	Salary and FTE Per Position Per Year					Capacity 20__
	Year 1 2018	Year 2 2019	Year 3 2020	Year 4 2021	Year 5 2022	
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 2018	Year 2 2019	Year 3 2020	Year 4 2021	Year 5 2022	
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 Every Student Succeeds 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;
 - (1) 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- describe your role and time commitment

1. Name of charter school on whose governing board you intend to serve:

2. Contact information:

Name:

Phone:

E-mail:

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.

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

Why do you wish to serve on the governing board of the proposed charter school?

What is your understanding of the appropriate role of a public charter school governing board member?

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.

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

- Attachment A.** Describe the role that the governing board will play in the school's operation.
- Attachment B.** How will you know if the school is successful at the end of the first year of operation?
- Attachment C.** How will you know at the end of five years if the school is successful?
- Attachment D.** What specific steps do you think the governing board will need to take to ensure that the school is successful?
- Attachment E.** 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

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: Financial Plan Workbook

NAME: Enter Name of School Here

Annual Budget
For Fiscal Year July 1, 20__ through June 30, 20__

Form A1 yellow cells - Formula cells, do not enter information.
blue cells - information provided by applicant
gray cells - leave cell blank, info not applicable

	Year 0 (Start Up)	Year 1	Year 2	Year 3	Line	Instructions/Notes
OPERATING REVENUES						
1					1	Per pupil funding received by the schools from the Commission or State of HI
2					2	Facilities funding, if any, received by the school from the Commission or State of HI
3					3	Other State funding (Testing, Etc.)
4					4	Grants awarded by the federal government (including those that pass through the Commission such as Title I, Title IIa, Impact Aid, Charter School Start-Up Assistance, etc.)
5					5	Grants awarded by private (non-governmental) foundations, corporations, or individuals.
6					6	Funding for nutrition programs is split between the federal and state governments. Split info. can be found at http://www.doe.mass.edu/news/news.asp?id=2533 .
7					7	Fees collected from students/parents for nutrition programs.
8					8	Any other fees (other than for nutrition or transportation) that the school collects transportation, uniforms, etc.
9					9	Ongoing donations from individuals, businesses, or corporations.
10					10	Fees collected from students or parents for transportation services.
11					11	Reimbursements from the State of Hawaii for special education students, if applicable.
12					12	Please enter a brief description in the highlighted green cell, if applicable.
13					13	Please enter a brief description in the highlighted green cell, if applicable.
14	-		-		14	Calculates automatically.
OPERATING EXPENSES						
15	-	-	-	-	15	Information for this cell pulled from the Sch_FuncExp sheet.
16	-	-	-	-	16	Information for this cell pulled from the Sch_FuncExp sheet.
17	-	-	-	-	17	Information for this cell pulled from the Sch_FuncExp sheet.
18	-	-	-	-	18	Information for this cell pulled from the Sch_FuncExp sheet.
19	-	-	-	-	19	Information for this cell pulled from the Sch_FuncExp sheet.
20	-	-	-	-	20	Information for this cell pulled from the Sch_FuncExp sheet.
23	-	-	-	-	23	Calculates automatically.
24	-	-	-	-	24	Calculates automatically.
NONOPERATING REVENUE						
25					25	Grants awarded by private foundations or corporations.
26					26	Monetary value of in-kind donations for services that would otherwise have been purchased.
27					27	Contributions made to the School by the Component Unit
28					28	One-time donations from individuals or corporations.
29					29	Income generated from rental of space.
30					30	Income generated from interest/investments.
31					31	Please enter a brief description in the highlighted green cell, if applicable.
32					32	Please enter a brief description in the highlighted green cell, if applicable.
33	-	-	-	-	33	Calculates automatically.
NONOPERATING EXPENSES						
34	-	-	-	-	34	Charter School figures will be populated from the Sch_FuncExp sheet.
35					35	Charter School figures will be populated from the Sch_FuncExp sheet.
36	-	-	-	-	36	Calculates automatically.
37	-	-	-	-	37	Calculates automatically.
CHANGES IN NET ASSETS:						
38	-		-		38	Calculates automatically.
39					39	Please enter a brief description of other changes in net assets (prior year adjustments, etc.) in the highlighted green cell, if applicable. For Year 0 (Start Up) should be zero.
40	-		-		40	Estimated Beginning Net Assets, For Year 0 (Start up), should be zero
41	-	-	-	-	41	Calculates automatically.

NAME:

Form A2

yellow cells - Formula cells, do not enter information.
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Schedule of Budgeted Functional Expenses

Instructions/Notes

For all personnel, please provide a full-time equivalency (FTE) total that corresponds to the salary expense reported. If individual's work week is 40 hours, then 1.0 FTE. If less than 40 hours per week need to calculate FTE [no. of hours scheduled/40hours]

Line	Functional Category	Year 0 (Start up Year)	FTE	Year 1	FTE	Year 2	FTE	Year 3	FTE
100	Administration	-	0.0	-	0.0	-	0.0	-	0.0
110	Subtotal - Local School Board (LSB)	-		-		-		-	
111	Contracted Services								
112	Travel and other expenses								
113	Supplies & Materials								
120	Subtotal - School Leadership	-	0.0	-	0.0	-	0.0	-	0.0
121	Salaries - Professional								
122	Contracted Services								
130	Subtotal - Business and Finance	-	0.0	-	0.0	-	0.0	-	0.0
131	Salaries - Professional								
132	Contracted Services								
140	Subtotal - Human Resources	-	0.0	-	0.0	-	0.0	-	0.0
141	Salaries - Professional								
142	Contracted Services								
150	Subtotal - Legal Services	-	0.0	-	0.0	-	0.0	-	0.0
151	Salaries - Professional								
152	Contracted Services								
160	Subtotal - Info. Management & Technology	-	0.0	-	0.0	-	0.0	-	0.0
161	Salaries - Professional								
162	Contracted Services								
163	Supplies and Materials								
164	Depreciation for Information Technology								
170	Subtotal - Development	-	0.0	-	0.0	-	0.0	-	0.0
171	Salaries - Professional								
172	Contracted Services								
173	Fundraising								
180	Subtotal - Other Administration	-	0.0	-	0.0	-	0.0	-	0.0
181	Salaries - Clerical								
182	Recruitment/Advertising								
183	Travel and other expenses								
184	Supplies and Materials								
185	Other: Dues, Licenses, Permits, Admin Meetings								
200	Instructional Services	-	0	-	0	-	0	-	0
210	Subtotal - Instructional Leadership	-	0.0	-	0.0	-	0.0	-	0.0

Line	
100	Administration - Calculates automatically.
110	Calculates automatically - expenses for the Local School Board.
111	LSB contracted professional services, including all related expenses covered by the contract
112	Travel and other expenses for Board members such as dues, subscriptions and memberships.
113	Supplies and materials for the operation of the LSB
120	Calculates automatically - expenses for the School Leadership office.
121	Salaries for non-instructional school-wide administrative personnel such as executive director (Principals and Instructional Leaders should be noted in Instructional Services).
122	Contracted professional services, including all related expenses covered by the contract.
130	Calculates automatically - expenses for the Business and Finance office.
131	Salaries for non-instructional school-wide administrative personnel such as business manager, accountant, chief financial officer, etc.
132	Contracted professional services, including all related expenses covered by the contract.
140	Calculates automatically - expenses for the HR office.
141	Salaries for non-instructional school-wide administrative personnel such as an HR director.
142	Contracted professional services, including all related expenses covered by the contract.
150	Calculates automatically - expenses for legal representation for the School.
151	Salaries for non-instructional school-wide administrative personnel such as a school attorney.
152	Contracted professional services, including all related expenses covered by the contract.
160	Calculates automatically - expenses that support the data processing needs of the school, including student databases.
161	Salaries for non-instructional school-wide administrative personnel such as a network support technician.
162	Contracted professional services, including all related expenses covered by the contract.
163	Materials and items of an expendable nature that are consumed or loses their identity through incorporation into a different/more complex unit/substance. Unit price of less than \$5000.
164	Annual depreciation expense for capitalized Information Management and Technology.
170	Calculates automatically - expenses related to development, fundraising, and recruitment.
171	Salaries for non-instructional school-wide administrative personnel such as a Director of Development.
172	Contracted professional services, including all related expenses covered by the contract.
173	Expenses related to fundraising.
180	Calculates automatically - expenses related to development, fundraising, and recruitment.
181	Salaries for administrative support personnel who prepare, transcribe, systematize or preserve communications, records and transactions.
182	Recruiting/advertising for students, staff, and board members.
183	Travel and other expenses for staff and the school such as dues, subscriptions and memberships.
184	Office Supplies and postage
185	Dues, Licenses, Permits, Admin Meetings
200	Instructional Services - Calculates automatically.
210	Calculates automatically - expenses for instructional leadership.

NAME:

Schedule of Budgeted Functional Expenses

Form A2

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Instructions/Notes

For all personnel, please provide a full-time equivalency (FTE) total that corresponds to the salary expense reported. If individual's work week is 40 hours, then 1.0 FTE. If less than 40 hours per week need to calculate FTE [no. of hours scheduled/40hours]

Line	Functional Category	Year 0 (Start up Year)	FTE	Year 1	FTE	Year 2	FTE	Year 3	FTE
211	Salaries - Professional								
212	Salaries - Clerical								
213	Contracted Services								
214	Supplies and Materials								
215	Travel and other expenses								
220	Subtotal - Classroom and Specialist Teachers	-	0.0	-	0.0	-	0.0	-	0.0
221	Salaries - Teachers, Classroom								
222	Salaries - Teachers, Specialists								
230	Subtotal - Other Teaching Services	-	0.0	-	0.0	-	0.0	-	0.0
231	Salaries - Professional								
232	Salaries - Nonclerical Paraprofessionals								
233	Salaries - Clerical								
234	Contracted Services								
240	Subtotal - Professional Development	-	0.0	-	0.0	-	0.0	-	0.0
241	Salaries - Professional								
242	Contracted Services								
243	Supplies and Materials								
244	Travel and other expenses								
250	Subtotal - Guidance, Psychological & Testing	-	0.0	-	0.0	-	0.0	-	0.0
251	Salaries - Professional								
252	Salaries - Clerical								
253	Contracted Services								
254	Supplies and Materials								
260	Subtotal - Materials, Equipment & Technology	-		-		-		-	

Line	Instructions/Notes
211	Salaries for instructional personnel in leadership roles such as Principal/Asst. Principals (undistributed), Curriculum Directors (including SPED), Department Heads, Technology/Instructional Coordinators, Team Leaders, etc.
212	Salaries for administrative support personnel who prepare, transcribe, systematize or preserve communications, records and transactions.
213	Contracted professional services, including all related expenses covered by the contract.
214	Materials and items of an expendable nature that is consumed or loses its identity through incorporation into a different/more complex unit/substance. Unit price of less than \$5000.
215	Travel and other expenses for staff such as dues, subscriptions and memberships.
220	Calculates automatically - expenses for teachers.
221	Salaries for teachers with primary responsibility for teaching designated curriculum to established "classes" of students in a group instruction setting. Also includes itinerant music, art, health, physical education teachers who travel from classroom-to-
222	Salaries for teachers with primary responsibility for teaching designated curriculum to established "classes" of students in a group instruction setting. Also includes itinerant music, art, health, physical education teachers who travel from classroom-to-
230	Calculates automatically - expenses for other teaching services.
231	Salaries for Medical/Therapeutic service professionals (OT, PT, Speech, Vision and other therapeutic services that are provided by licensed practitioners), librarians, media center directors, substitute teachers on payroll.
232	Salaries for paraprofessionals hired to assist teachers/specialists with classroom instruction or to assist teachers in the preparation or reproduction of instructional materials or operation and maintenance of instructional equipment or performance of o
233	Salaries for administrative support personnel who prepare, transcribe, systematize or preserve communications, records and transactions.
234	Contracted professional services, including all related expenses covered by the contract, for other teaching services (non-payroll substitute teachers should be included here).
240	Calculates automatically - expenses for professional development of instructional personnel.
241	Salaries for full-time or prorated salary (if 50% or greater) of director/staff for professional development, including training for new teachers, new curriculum or instructional practices, master and mentor teachers, coaches. Also salaries of teacher/ins
242	Contracted professional services, including all related expenses covered by the contract, for professional development (non-payroll substitute teachers should be included here).
243	Materials and items of an expendable nature that is consumed or loses its identity through incorporation into a different/more complex unit/substance. Unit price of less than \$5000.
244	Travel and other expenses for staff such as dues, subscriptions and memberships.
250	Calculates automatically - expenses for guidance, psychological, and testing.
251	Salaries for Director of Guidance, school social workers, and counselors for guidance, school adjustment, higher education, career planning, and workplace learning placement; psychological evaluations and other services provided by a licensed mental heal
252	Salaries for administrative support personnel who prepare, transcribe, systematize or preserve communications, records and transactions.
253	Contracted professional services, including all related expenses covered by the contract, for guidance, psychological, and testing.
254	Materials and items of an expendable nature that is consumed or loses its identity through incorporation into a different/more complex unit/substance. Unit price of less than \$5000.
260	Calculates automatically - expenses for materials, equipment & technology.

NAME:

Schedule of **Budgeted** Functional Expenses

Form A2

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Instructions/Notes

For all personnel, please provide a full-time equivalency (FTE) total that corresponds to the salary expense reported. If individual's work week is 40 hours, then 1.0 FTE. If less than 40 hours per week need to calculate FTE [no. of hours scheduled/40hours]

Line	Functional Category	Year 0 (Start up Year)	FTE	Year 1	FTE	Year 2	FTE	Year 3	FTE
261	Textbooks & Related Media/Materials								
262	Other Instructional Materials								
263	Instructional Equipment								
264	General Instructional Supplies								
265	Other Instructional Services								
266	Classroom Instructional Technology								
267	Other Instructional Hardware								
268	Instructional Software								
269	Depreciation for Instructional Equipment								
300	Pupil Services	-	0.0	-	0.0	-	0.0	-	0.0
310	Salaries - Pupil Services								
320	Health Services								
330	Student Transportation (to and from school)								
340	Depreciation of Transportation Vehicles								
350	Food Services								
360	Athletic Services								
370	Other:								
400	Operation & Maintenance of Plant	-	0.0	-	0.0	-	0.0	-	0.0
410	Salaries - Operation & Maintenance of Plant								
415	Utilities								
420	Maintenance of Buildings & Grounds								
425	Maintenance of Equipment								
430	Networking and Telecommunications								
435	Depreciation of Equipment, Building, & Grounds								
440	Rental/Lease of Buildings & Grounds								
445	Rental/Lease of Equipment								
450	Other: Furniture & Equipment								
455	Other: Custodial supplies								
460	Other:								
500	Benefits and Other Fixed Charges	-		-		-		-	

Line	Instructions/Notes
261	Expenditures for all textbooks, workbooks, and materials including accessories, such as CD-ROMS, videos, etc. provided as an integrated package, and printed manuals, used to support direct instructional activities.
262	Books and other materials, excluding textbooks, for use in school libraries or classroom libraries (trade books, periodicals, reference materials, etc.).
263	Non-capitalized expenditures for purchase of science laboratory, physical education, equipment, irrespective of unit cost. Also includes lease/purchase of copy equipment primarily used to produce instructional materials.
264	Papers, pens, pencils, crayons, chalk, paint, toner printer cartridges, calculators, etc.
265	Cost for field trips, including admissions and transportation costs. Also, distance learning services.
266	Computers, servers, networks, scanners, digital cameras, etc. used in the classroom or in computer laboratories.
267	Computers, servers, networks, scanners, digital cameras, etc. for school libraries and media centers.
268	Programs, licenses, CD-ROMs.
269	Annual depreciation expense for capitalized Instructional Materials, Equipment, & Technology.
300	Pupil Services - Calculates automatically.
310	School nurses, registrars, coaches, etc. on payroll.
320	Contracted professional services and related costs, including stipends.
330	Contracted professional services and related costs incurred by the school for Home-to-school student transportation.
340	Annual depreciation expense for capitalized transportation vehicles.
350	Contracted professional services and related costs, including stipends incurred for the school's food services program.
360	Contracted professional services and related costs, including stipends.
370	Specify other pupil services expenditures, if applicable.
400	Operation & Maintenance of Plant - Calculates automatically.
410	Plant managers, custodians, maintenance, etc.
415	Cost of heating fuel, oil, electricity, gas, water, trash, waste disposal, telephone services, etc.
420	Includes contracted custodial services and building security.
425	Equipment parts and repair, materials, and tools, contracted services, including vehicles.
430	Costs for supporting school technology infrastructure, including wiring, PBX Systems, file servers, etc.
435	Annual depreciation expense for capitalized Equipment, Networking and Telecommunications, Building, & Grounds.
440	Annual operating lease/rental costs on Building/Grounds.
445	Annual operating lease/rental costs on other operations and maintenance of plant equipment.
450	School Equipment and Furniture
455	Custodial Supplies
460	Specify other operations & maintenance of plant expenses
500	Benefits and Other Fixed Charges - Calculates automatically.

NAME:

Form A2

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Schedule of **Budgeted** Functional Expenses

Line	Functional Category	Year 0 (Start up Year)	FTE	Year 1	FTE	Year 2	FTE	Year 3	FTE
510	Employee Retirement								
520	Fringe Benefits								
530	Insurance (non-employee)								
560									
570	Other:								
600	Community Services	-		-		-		-	
610	Dissemination Activities								
620	Civic Activities								
700	Non-Operating Expenses	-		-		-		-	
720									
730	Other:								
800	TOTALS	-	0.0	-	0.0	-	0.0	-	0.0

Instructions/Notes

For all personnel, please provide a full-time equivalency (FTE) total that corresponds to the salary expense reported. If individual's work week is 40 hours, then 1.0 FTE. If less than 40 hours per week need to calculate FTE [no. of hours scheduled/40hours]

Line	Notes
510	Not an expense for the schools
520	Not an expense for the schools
530	Insurance premiums for property, fire, liability, fidelity bonds; judgments against the school resulting from self-insurance.
560	
570	Specify other fixed charge expenditures, if applicable, which may include costs of public safety inspections.
600	Community Services - Calculates automatically.
610	Activities designed to disseminate the school's best practices to external groups, including presentations at or hosting of conferences, etc.
620	Materials and items of an expendable nature that is consumed or loses its identity through incorporation into a different/more complex unit/substance. Unit price of less than \$5000.
700	Non-Operating Expenses - Calculates automatically.
720	
730	Please enter a brief description in the highlighted green cell, if applicable.
800	TOTALS - Calculates automatically.

NAME:

Form A3

Schedule of **Estimated** Monthly Cash Flows

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Line	Description	Year 1												
		Total	July	August	September	October	November	December	January	February	March	April	May	June
CASH FLOWS FROM OPERATING ACTIVITIES														
Cash from Government Funding														
1	State Sources	-												
2	Federal Sources	-												
3	Local Cash Receipts													
4	Cash Contributions	-												
5	Interest Received	-												
6	Other Local Cash Receipts	-												
7	Cash Paid to Employees and Vendors													
7.1		-												
7.2		-												
7.3		-												
7.4		-												
7.5		-												
7.6		-												
7.7		-												
7.8		-												
7.9		-												
8	NET CASH PROVIDED (USED) BY OPERATING ACTIVITIES	-	-	-	-	-	-	-	-	-	-	-	-	-
CASH FLOWS FROM INVESTING ACTIVITIES														
9	Cash Used to Purchase Capitalized Assets	-												
10	Cash Receipts from Sale of Capitalized Assets	-												
11	NET CASH PROVIDED (USED) BY INVESTING ACTIVITIES	-	-	-	-	-	-	-	-	-	-	-	-	-
CASH FLOWS FROM FINANCING ACTIVITIES														
12	Proceeds from Debt Obligations	-												
13	Proceeds from Capital Leases	-												
14	Principal Payments on Debt Obligations	-												
15	Principal Payments on Capital Leases	-												
16	NET CASH PROVIDED (USED) BY FINANCING ACTIVITIES	-	-	-	-	-	-	-	-	-	-	-	-	-
17	NET CASH INCREASE (DECREASE) FOR THE PERIOD	-	-	-	-	-	-	-	-	-	-	-	-	-
18	CASH BALANCE, BEGINNING OF THE PERIOD	-												
20	CASH BALANCE, END OF PERIOD	-												

Line	Instructions/Notes
1	Include cash receipts from state sources including per pupil amounts. Per pupil amounts are typically distributed in July, November and after January
2	Include cash receipts from federal sources including entitlement program amounts. Federal program amounts are typically distributed in after the school has been determined to be eligible and after necessary applications have been submitted.
3	
4	Enter estimated cash contributions
5	Enter estimated interest to be received on deposits
6	Enter cash receipts from other local sources
7	Enter cash payments for operations. Enter payments as a negative amount. Do not enter payments for capital assets or principal on debt.
7.1	Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
7.2	Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
7.3	Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
7.4	Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
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7.7	Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
7.8	Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
7.9	Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
8	Calculates automatically.
9	Enter amounts used to purchase capitalized assets (furniture, fixtures, equipment, etc.). Enter as negative amounts.
10	Enter amounts received upon the sale of capitalized assets (furniture, fixtures, equipment, etc.). Enter as a positive amount.
11	Calculates automatically
12	Enter cash received from proceeds of debt issued.
13	Enter the purchase price for any capital lease contracts
14	Enter the principal portion of debt service payments (interest payments should be reported in the operating activities section).
15	Enter the principal portion of any cash payments on capital leases.
16	Calculates automatically
17	Calculates automatically
18	Calculates automatically, except for July - enter july beginning cash balance
20	Calculates automatically

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Line **Instructions/Notes**

- 1 Include cash receipts from state sources including per pupil amounts. Per pupil amounts are typically distributed in July, November and after January
- 2 Include cash receipts from federal sources including entitlement program amounts. Federal program amounts are typically distributed in after the school has been determined to be eligible and after necessary applications have been submitted.
- 3
- 4 Enter estimated cash contributions
- 5 Enter estimated interest to be received on deposits
- 6 Enter cash receipts from other local sources
- 7 Enter cash payments for operations. Enter payments as a negative amount. Do not enter payments for capital assets or principal on debt.
Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
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- 7.9 Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
- 8 Calculates automatically.

- 9 Enter amounts used to purchase capitalized assets (furniture, fixtures, equipment, etc.). Enter as negative amounts.
- 10 Enter amounts received upon the sale of capitalized assets (furniture, fixtures, equipment, etc.). Enter as a positive amount.
- 11 Calculates automatically

- 12 Enter cash received from proceeds of debt issued.
- 13 Enter the purchase price for any capital lease contracts
- 14 Enter the principal portion of debt service payments (interest payments should be reported in the operating activities section).
- 15 Enter the principal portion of any cash payments on capital leases.
- 16 Calculates automatically

- 17 Calculates automatically

- 18 Calculates automatically, except for July - enter july beginning cash balance
- 20 Calculates automatically

yellow cells - Formula cells, do not enter information.

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Line **Instructions/Notes**

- 1 Include cash receipts from state sources including per pupil amounts. Per pupil amounts are typically distributed in July, November and after January
- 2 Include cash receipts from federal sources including entitlement program amounts. Federal program amounts are typically distributed in after the school
- 3 has been determined to be eligible and after necessary applications have been submitted.
- 4 Enter estimated cash contributions
- 5 Enter estimated interest to be received on deposits
- 6 Enter cash receipts from other local sources
- 7 Enter cash payments for operations. Enter payments as a negative amount. Do not enter payments for capital assets or principal on debt.
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- 7.9 Optional lines to use to provide a more detailed accounting of the projected cash payments related to school operations. In the description column add a description of the payment. Enter payments as negative amounts
- 8 Calculates automatically.

- 9 Enter amounts used to purchase capitalized assets (furniture, fixtures, equipment, etc.). Enter as negative amounts.
- 10 Enter amounts received upon the sale of capitalized assets (furniture, fixtures, equipment, etc.). Enter as a positive amount.
- 11 Calculates automatically

- 12 Enter cash received from proceeds of debt issued.
- 13 Enter the purchase price for any capital lease contracts
- 14 Enter the principal portion of debt service payments (interest payments should be reported in the operating activities section).
- 15 Enter the principal portion of any cash payments on capital leases.
- 16 Calculates automatically

- 17 Calculates automatically

- 18 Calculates automatically, except for July - enter july beginning cash balance
- 20 Calculates automatically

NAME: Enter Name of School Here

Statement of Net Assets (Balance Sheet)
As of June 30, 20xx

ASSETS		Year 0	Year 1	Year 2
Current Assets				
1	Cash and Cash Equivalents			
2	Accounts Receivable net of doubtful accounts			
3	Grants Receivable - State			
4	Grants Receivable - Federal			
5	Grants Receivable - Private			
6	Contributions Receivable			
7	Due from related parties			
8	Prepaid Expenses			
9	Short-Term Investments			
10	Other:			
11	Other:			
12	TOTAL CURRENT ASSETS	-	-	-
Noncurrent Assets				
<i>Capital Assets</i>				
13	- Land and Buildings			
14	- Building/Leasehold Improvement			
15	- Furniture and Equipment			
16	- Less Accumulated Depreciation			
17	Net Capital Assets	-	-	-
18	Restricted cash and cash equivalents			
19	Long-Term Investments			
20	Other:			
21	Other:			
22	TOTAL NONCURRENT ASSETS	-	-	-
23	TOTAL ASSETS	-	-	-
LIABILITIES AND NET ASSETS				
Current Liabilities				
24	Accounts Payable			
25	Accrued Expenses			
26	Deferred Revenue			
27	Due to related parties			
28	Current Debt Payable			
29	Current Lease Obligations Payable			
30	Other:			
31	Other:			
32	TOTAL CURRENT LIABILITIES	-	-	-
Noncurrent Liabilities				
33	Noncurrent Lease Obligations			
34	Long-Term Debt			
35	Other:			
36	Other:			
37	TOTAL NONCURRENT LIABILITIES	-	-	-
38	TOTAL LIABILITIES	-	-	-
NET ASSETS				
39	Investment in capital assets (net of related debt)	296,382	296,382	296,382
<i>Restricted:</i>				
40	- Temporarily:			
41	- Permanently:			
42	Unrestricted:			
43	TOTAL NET ASSETS	296,382	296,382	296,382
44	TOTAL LIABILITIES AND NET ASSETS	296,382	296,382	296,382

Year 3

-

-
-
-

-

-
-

296,382

296,382
296,382

Instructions/Notes

No need to enter information in this cell. Information is pulled from another schedule or based on a formula.

Enter Information in this cell.

Assets that are cash or can be converted into cash immediately.

A school's claim for money, goods and services from customers and other entities.

Claims for goods and services provided under state awarded contracts.

Claims for goods and services provided under federal awarded contracts.

Claims for goods and services provided from private awards received.

Unconditional promises to give by private individuals or corporations.

Amounts to be received from related parties.

An expense paid but not incurred as of year end.

Readily marketable security for which the intention of the school is the conversion to cash in the short term.

Please enter a brief description in the highlighted green cell, if applicable.

Please enter a brief description in the highlighted green cell, if applicable.

Calculates automatically.

Costs for purchase of land and building inclusive of remodeling, reconditioning, or altering the building purchased to make it available.
Improvements on leased property that revert back to the owners upon termination of the lease.

Purchases of furniture and equipment that meet the school's capitalization policy.

The aggregate, at a given point in time, of the depreciation charges made during the useful life of the fixed asset. Enter as a negative amount.

Calculates automatically.

Cash restricted by external sources for future purchases.

Investments that do not meet the criteria of "Short-Term Investments" above.

Please enter a brief description in the highlighted green cell, if applicable.

Please enter a brief description in the highlighted green cell, if applicable.

Calculates automatically.

Calculates automatically.

Obligations for goods or services purchased for which invoices have been received.

An unpaid expense incurred that has not been paid as of the end of the period.

Cash received for services not performed (i.e., grant funds received that were not expended).

Amounts due to related parties.

Debt obligations due within one year of financial statement date.

Lease obligations due within one year of financial statement date.

Please enter a brief description in the highlighted green cell, if applicable.

Please enter a brief description in the highlighted green cell, if applicable.

Calculates automatically.

Lease obligations due after one year of financial statement date.

Debt obligations due after one year of financial statement date.

Please enter a brief description in the highlighted green cell, if applicable.

Please enter a brief description in the highlighted green cell, if applicable.

Calculates automatically.

Calculates automatically.

Represents capital assets reduced by accumulated depreciation and any outstanding debt used to acquire, construct or improve

Please enter a brief description of restriction nature in the highlighted green cell, if applicable.

Please enter a brief description of restriction nature in the highlighted green cell, if applicable.

Net assets that do not meet the definitions of any of the above categories.

Calculates automatically.

Calculates automatically.

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the purpose for which it was acquired.

number.

sets.

Exhibit 6: Final Review Checklist

Final Review Checklist

Initial each item to indicate that it has been completed.

- A copy of the application and all of its attachments has been saved for your records.
- All required attachments have been submitted.
- The application adheres to all applicable page and word limits.
- All elements of the application have been converted to proper format for submission.
- Application does not contain handwritten parts (other than signatures).
- Every page of the narrative proposal is properly labeled with a page number and name of the proposed school in the footer.

