



## Indiana Charter School Board Evaluation Rubric

### INTRODUCTION

The following ratings should be used to rate applicant responses. Within each section, specific criteria define the expectations for a response that “Meets the Standard.” This rubric covers both New and Experienced Operator Applications. Areas of review and attachments specific to each Application have been specifically identified.

Rating	Characteristics
<b>Meets the Standard</b>	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 school expects to operate; and inspires confidence in the applicant’s capacity to carry out the plan effectively.
<b>Approaches the Standard</b>	The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.
<b>Partially Meets the Standard</b>	The response meets the criteria in some respects but has substantial gaps in a number of areas.
<b>Does Not Meet the Standard</b>	The response is wholly undeveloped or significantly incomplete; demonstrates lack of preparation; or otherwise raises substantial concerns about the viability of the plan or the applicant’s ability to carry it out.

Select a rating for each section based on the provided evaluation criteria. Space is provided for you to indicate the response’s strengths and weaknesses and to list one or more suggested capacity interview questions. In the final section, please provide your overall recommendation with respect to the application (approve, approve with conditions, or deny) along with an application summary.

**Name of Applicant:** \_\_\_\_\_

**Type of Application:** \_\_\_\_\_

**Name of Reviewer:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## EXECUTIVE SUMMARY

### Evaluation Criteria

A response that Meets the Standard will address the following:

#### **Mission and Vision**

A clear, focused, compelling mission and vision statement that is

- Sufficient to guide the school's operation.
- Establish priorities that are meaningful, measurable and attainable.
- Provide the school community and external stakeholders a clear, memorable picture of what the school aims to achieve.

#### **Educational Need and Target Population**

- Identify the school, target student population and community to be served.
- Well-defined educational needs and challenges of the targeted student population, and sound rationale for the decision to serve this population, including the grade levels chosen.

#### **Community Engagement**

- Clearly describes the status of engagement efforts to date.
- Presents a vision and strategy for engagement that is reasonably likely to further the school's mission and programs.
- Provides evidence that anticipated partnerships are realistic and achievable.

#### **Education Plan/School Design**

- Compelling overview of the proposed education program, including key non-negotiables; summary of the evidence base demonstrating likely success with the targeted population; and summary of how the school would achieve its goals.

#### **Vision for Growth**

- Sound vision and five-year growth plan for the proposed school, including sensible rationale for enrollment plan.

#### **Governance and Leadership**

- Well-constructed governance and management structure and leadership team for the proposed school, including: strengths of the school leadership team and the proposed governing board, and sound governance and management structure that will provide for stable, effective governance and leadership of the school.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**SECTION I: EVIDENCE OF CAPACITY**

Applicant Group

Evaluation Criteria

A response that Meets the Standard will address the following:

- Evidence that the applicant group’s collective qualifications (documented by resumes for all members) are sufficient to establish and operate a high-quality charter school in the proposed community. See **Attachment 1** for Applicant Group Resumes.
- Demonstrated commitment and meaningful ongoing operational or governance roles for members of the applicant group.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Governing Board**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Effective governance structure and board powers, duties, and current and desired size and composition (including diverse expertise and effective representation of key stakeholders) that will help ensure school success.
- Proposed board members who demonstrate (as documented by resumes, and Board Member Information Forms) a) the will, capacity and commitment to govern the school effectively; and b) shared vision, purposes and expectations for the school. See **Attachment 1** for Applicant Group Resumes and **Attachment 2** for Statement of Economic Interest and Conflict of Interest Forms.
- Evidence that the governing board possesses the wide range of knowledge, skills, and commitment needed to actively and effectively oversee a successful charter school, including areas such as school leadership, administration and governance; curriculum; instruction and assessment; financial, business and school operations management; performance management; parent and community engagement; and facilities management.
- (If applicable) Clear roles, duties and composition of any advisory bodies/councils, and effective relationship to the school governing board and leadership. See **Attachment 3** for Decision-Making Authority for New Operators Applicants or **Attachment 4** for Governance and Operational Structure for Experienced Operator Applicants.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Board Procedures and Policies**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Effective governance procedures including description of meetings to date, planned frequency and focus of meetings, standing committees, and compliance with Indiana’s Public Access Laws.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**School Leader and Leadership Team**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Appropriate responsibilities and qualifications of the school’s leadership/management team (beyond the school leader).
- (If School Leader candidate is identified) Evidence of the leader’s ability to lead a school that effectively serves the target population.
- (If School Leader candidate is not yet identified) Evidence of the Board’s preparation and plan to recruit and retain a leader with the ability to lead a school that effectively serves the target population.
- (If members of the leadership team are identified) Individuals who demonstrate the qualifications, capacities and commitment to carry out the designated leadership roles to ensure the success of the proposed school.
- (If leadership team is not yet identified) Sound timeline, criteria, and process for recruiting and hiring the leadership team.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Education Service Provider (if applicable)**

Evaluation Criteria

A response that Meet the standard will address the following:

- Thoughtful rationale for why the Education Service Provider (“ESP”) partner was selected, and why the ESP will be a good fit for the proposed school(s) and community. If the application refers to the conduct of background research regarding the performance of the ESP, indicate whether such the research was cursory or comprehensive in nature.
- Clearly defined and reasonable terms (summarized in a term sheet and detailed in a draft contract) including: roles and responsibilities of the school governing board, school staff, and ESP; specific services and resources to be provided by the ESP; performance evaluation measures and mechanisms; clearly described ESP fee structure; financial controls and oversight; methods of contract oversight and enforcement; investment disclosure; and conditions for renewal and termination of the contract. See **Attachment 3** for Education Service Provider Information and **Attachment 4** for Governance and Operational Structure.
- Capacity and commitment of the school governing board to oversee the ESP effectively, including specifying how the board will monitor and evaluate the ESP’s performance, and how the governing board will ensure fulfillment of performance expectations.
- Disclosure and explanation of any existing or potential conflicts of interest between the school governing board and ESP or any affiliated business entities.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Network Vision, Growth Plan, and Capacity (if applicable)**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Provides clear five-year business plan that addresses strategic vision and desired impact for developing new schools in Indiana. See **Attachment 5** for Network Business Plan. This plan must include:
  - Number and types of schools;
  - Planned opening years;
  - Currently targeted geographies and criteria for selecting them;
  - Projected numbers of students; and
  - Measurable impact on student achievement.
- Demonstrates capacity by the organization in the areas of human capacity and ability to support long-term success of proposed schools.
- Identifies anticipated risks and challenges to achieving organization’s desired outcomes in Indiana.
- Describes how proposed schools in Indiana align with the organizations overall growth plan including specific details on how the organization will support and ensure quality in the Indiana schools.

Evaluation

Check one (required)

Meets the Standard

Partially Meets the Standard

Approaches the Standard

Does Not Meet the Standard

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## SECTION II: SCHOOL DESIGN

### Curriculum and Instructional Design

#### Evaluation Criteria

A response that Meets the Standard will address the following:

- Sound and comprehensive framework for a rigorous, quality instructional design that reflects the needs of the school's target population and will ensure all students meet or exceed the expectations of Indiana's College and Career Ready Academic Standards. The description of the instructional design should include at a minimum: the basic learning environment, class size and structure, curriculum overview, the use of technology in delivering instruction (if applicable), and plans for ensuring the school is staffed with high-quality teachers.
- Evidence that the proposed educational program has a sound evidence base, and has been or is likely to be rigorous, engaging and effective for the anticipated student population.
- Sound instructional strategies and explanation of why they are well-suited for the targeted student population, including effective methods and systems for providing differentiated instruction to meet the needs of all students.
- Comprehensive, quality curriculum overview including a course scope and sequence by subject for each grade level the school would serve, and demonstrated alignment of course outcomes with Indiana's Academic Standards. See Course Scope and Sequence **Attachment 4** for New Operator Applicant and **Attachment 6** for Experienced Operator Applicants.
- **(For Blended Learning Operators)** A clear description of the amount of instruction delivered through distance learning, online technologies, and/or computer based instruction per day and a reasonable assessment of whether or not the school meets the definition of a virtual charter school as defined under Indiana law.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Pupil Performance Standards**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Clear, rigorous exit standards provided for each division the school would serve (i.e., elementary, middle, or high school). Exit standards should clearly set forth what students in the last grade in each division will know and be able to do. See Academic and Exit Standards **Attachment 5** for New Operator Applicants and **Attachment 7** for Experienced Operator Applicants.
- Clear, rigorous grade promotion and graduation policies and standards.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Graduation Requirements (if applicable)**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Sound plan for meeting Indiana’s Graduation Requirements (including credits, GPA calculation, transcripts, electives, and any additional “local” requirements), and how the plan will facilitate student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).
- Effective systems and structures the school will implement for students at risk of dropping out or not meeting graduation requirements.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**School Calendar and Schedule**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Provides a calendar for the first year of operation along with sample daily and weekly schedules. Schedules need to meet minimum Indiana requirements.
- Schedules should include number of instructional hours/minutes that align with educational program and are conducive to significantly improving student learning. See School Calendar and Schedule **Attachment 6** for New Operator Applicants or **Attachment 8** for Experienced Operator Applicants.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## School Culture

### Evaluation Criteria

A response that Meets the Standard will address the following:

- Vision for school culture that will promote a positive academic environment and student intellectual and social development.
- Coherent plan for establishing and maintaining the intended culture for students, teachers, administrators, and parents.

### Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## Supplemental Programming (if applicable)

### Evaluation Criteria

A response that Meets the Standard will address the following:

- Sound plan, design, schedule and funding for summer school that will meet anticipated student needs.
- Well-designed plans and funding for extracurricular and co-curricular activities, programs and services that will meet anticipated student needs and provide enrichment experiences.
- Thoughtful, well-supported description of programs or strategies to address student mental, emotional, and social development and health, and of any other student-focused activities and programs that are integral to the school's educational and student-development plans.

Evaluation

Check one (required)

Meets the Standard

Partially Meets the Standard

Approaches the Standard

Does Not Meet the Standard

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Special Populations and At-Risk Students**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Demonstrated understanding of – and capacity to fulfill – state and federal obligations and requirements pertaining to students with disabilities and English Language Learners.
- Realistic plans to serve and to monitor and ensure academic progress for the following groups of students:
  - Students with mild, moderate, and severe disabilities;
  - English Language Learners;
  - Intellectually gifted students;
  - Students at risk of academic failure or dropping out; and
  - Any other special populations or at-risk groups identified by the school.
- Plans should describe evidence-based instructional programs and practices; effective design or adaptation of the educational program; qualified staffing; and support strategies and resources.

Evaluation

Check one (required)

Meets the Standard

Partially Meets the Standard

Approaches the Standard

Does Not Meet the Standard

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

### Student Recruitment and Enrollment

#### Evaluation Criteria

A response that Meets the Standard will address the following:

- Sound and thoughtful student recruitment plan that is aligned to targeted enrollment numbers and students.
- Sets out a timeline for recruitment activities.
- Provides enrollment policy that provides equal access to all interested students and families. See Enrollment Policy **Attachment 7** for New Operator Applicants or **Attachment 9** for Experienced Operator Applicants.
- Plan addresses policies and procedures for waiting lists, withdrawals, re-enrollment and transfers.
- Identify any admission requirements include the explanation of the purpose for pre-admission activities for students and parents.

#### Evaluation

Check one (required)

Meets the Standard

Partially Meets the Standard

Approaches the Standard

Does Not Meet the Standard

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Student Discipline**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Approach to student discipline for the target population that provides for appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture while respecting student rights. See Student Discipline Policy **Attachment 8** for New Operator Applicants or **Attachment 10** for Experienced Operator Applicants.
- Appropriate and effective strategies to ensure the integrity and authenticity of student work product and assessment scores.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Grievance Policy**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Policy clearly describes the process to address complaints or concerns about school or school board policies, practices or administrative procedures. See Grievance Policy **Attachment 9** for New Operator Applicants or **Attachment 11** for Experienced Operator Applicants.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## Parents and Community

### Evaluation Criteria

A response that Meets the Standard will address the following:

- Sufficient need for another choice based on the performance and/or school models of the schools currently in the immediate vicinity with the same or similar grade configuration.
- Realistic evidence of sufficient demand from families to meet the school's enrollment projections.
- Parent engagement plan, including family-school partnerships, that is welcoming and accessible to all parents.
- Evidence of engagement with community leaders or a detailed and thoughtful plan to engagement with community leaders. See Evidence of Support from Community Partners **Attachment 10** for New Operator Applicants and **Attachment 12** for Experienced Operator Applicants.
- Community resources and partnerships that will benefit students and parents, including a) description of the nature, purposes, terms, and scope of services of any such partnerships; and b) evidence of commitment from identified community partners.

### Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## Performance Management

### Evaluation Criteria

A response that Meets the Standard will address the following:

- Thoughtful, specific and measurable goals and timeline to determine whether or not the school has achieved success with students.
- Clear identification of formative/interim assessments that are aligned with the school's curriculum, performance goals and state standards.
- Comprehensive, effective plan for collecting and analyzing student academic achievement data, and using the data to refine and improve instruction. The application should identify the person or people responsible for this analysis and refinement.
- Clear description of the school's data warehouse system(s) for student academic achievement data. The application should identify the personnel who will be responsible for managing and interpreting the data for teachers and leading or coordinating data-driven professional development.
- Thoughtful, appropriate corrective actions the school will take if it falls short of student academic achievement expectations or goals at any level, including explanation of what would trigger such actions and who would implement them.

### Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## SECTION III: IMPLEMENTATION PLAN

### Governance Documents

#### Evaluation Criteria

A response that Meets the Standard will address the following:

- The applicant has furnished copies of the 501(c)(3) Letter of Determination from the IRS (or evidence that the applicant has applied for federal tax-exempt status from the IRS), Articles of Incorporation, Bylaws, and Code of Ethics, and Conflict of Interest policies. See Governance Documents **Attachment 11** for New Operator Applicants or **Attachment 13** for Experienced Operator Applicants.
- The proposed school's Bylaws have sound policies and procedures with regards to governance of the organization.
- Per Indiana Code 20-24-3-3, the Articles of Incorporation or Bylaws contain a clause ensuring that upon dissolution all remaining assets shall be used for nonprofit educational purposes and remaining funds received from the Indiana Department of Education shall be returned to the department within 30 days.
- The proposed school has provided a signed, completed Statement of Assurances. See Statement of Assurances **Attachment 12** for New Operator Applicants or **Attachment 14** for Experienced Operator Applicants.

#### Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## School Staffing

### Evaluation Criteria

A response that Meets the Standard will address the following:

- Staffing plan aligned with the educational program and conducive to the school's successes, illustrated by a complete staffing chart showing both Year 1 and future positions with a thorough description, including clear lines of authority and effective management of the administration-staff relationship. See Organizational Chart **Attachment 13** for New Operators Applicants or **Attachment 15** for Experienced Operators Applicants.

### Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## School Leadership, Hiring, Management, and Evaluation

### Evaluation Criteria

A response that Meets the Standard will address the following:

- Logical and clear plan for identifying leaders for the proposed Indiana school(s). The response should align with the 5-Year business plan, and should include the responsible parties and associated recruiting/development costs.
- Recruitment and hiring strategy, criteria, timeline and procedures that are likely to result in a highly qualified staff.

- Thoughtful plan to maximize impact of high-performing teachers to ensure every student has access to excellent teaching.
- Effective plan for evaluating school leadership and teachers, and retaining strong performers.
- Effective plan for identifying and addressing unsatisfactory leadership/teacher performance, and managing staff turnover.
- Compensation packages, system and strategy that are likely to attract and retain strong staff.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Professional Development**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Professional development standards, opportunities, leadership, and calendar/scheduling that effectively support the education program and are likely to maximize success in improving student achievement.
- Clear and effective plan for pre-opening staff professional development and on-boarding activities.

- Thoughtful plan for evaluating the success of the school’s professional development program.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Start-Up and Operations**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Detailed start-up plan specifying tasks, timelines and responsible individuals, and sound Start-Up Budget. See Start-Up Plan **Attachment 14** for New Operator Applicants or **Attachment 16** for Experienced Operator Applicants.
- (If the school will provide transportation) Sound plan for student transportation, including both daily and special-event transportation.
- Sound plans for school and student safety and security, including security personnel, technology, equipment, and policies.
- **For virtual and blended learning operators**
  - Detailed description of school versus student and family responsibilities with respect to technology requirements.
  - Detailed description of technical support, data retention, security and confidentiality procedures.
  - Detailed offsite backup plan and arrangement in case of system failure to deliver instruction.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Facility Plan**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Sound plan and timeline for securing, financing, renovating and ensuring code compliance for a facility; and demonstrated capacity and experience in facility management, including build out/renovations. If a facility has not already been secured, realistic progress in securing a facility should be demonstrated.
- ***NOTE:** Responses from virtual operators should align with their proposed instructional and delivery model.*

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Note: The following three finance sections are primarily reviewed by financial evaluators. G Content evaluators should skim these sections and attachments and evaluate the budget in the context of the full application.**

**Budget and Finance Systems & Procedure**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Sound systems and processes for accounting, purchasing, payroll, and annual independent financial and administrative audits, including evidence that the school will adhere to Generally Accepted Accounting Principles (“GAAP”) and Indiana State Board of Accounts (“SBOA”) accounting, auditing and reporting procedures and requirements.
- *(If Applicable)* Sound plan for selecting contractors for administrative or back-office support services.
- Clear description of the financial controls and responsibilities at the school level to ensure long-term financial viability.
- Clear explanation of how an independent, annual audit of school-level financial and administrative operations will be conducted.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

**Five-Year Budget**

Evaluation Criteria

A response that Meets the Standard will address the following:

- Complete, realistic, and viable start-up and 5-year operating budgets that align with the educational and organizational plans described in the Application Narrative. See Budget Projections Workbook **Attachment 16** for New Operator Applicants or **Attachment 18** for Experienced Operator Applicants.

Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## Budget Narrative

### Evaluation Criteria

A response that Meets the Standard will address the following:

- Provides a Budget Narrative that clearly explains reasonable, well-supported revenue and cost assumptions including grant/fundraising assumptions, including identifying the amount and sources of all anticipated funds, property or other resources (noting which are secured versus anticipated, and evidence of firm commitments where applicable). See Budget Narrative **Attachment 17** for New Operator Applicants or **Attachment 19** Experienced Operator Applicants.
- Sound contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.
- Thoughtful explanation for how the school will ensure funds are sufficient to cover all anticipated expenses.
- *Additional requirement for Pre-Existing Non-Profit Organizations:* Strong and transparent financial performance of the pre-existing non-profit organization, demonstrated by a) the last three years of audited financial statements and management letters; and (b) the most recent internal financial statements including balance sheets and income statements. See **Attachment 18** for Existing Non-Profit Entity Financials for New Operator Applicants or **Attachment 20** for Existing Organizer Financials for Experienced Operator Applicants.

### Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

### **Additional Questions**

## SECTION IV: PORTFOLIO REVIEW AND PERFORMANCE RECORD

(Experienced Operator Applicants Only)

### Portfolio Performance

#### Evaluation Criteria

A response that Meets the Standard will address the following:

- Thoughtful discussion of a high-performing school in the network, including the evidence base for judging the school as high-performing; causes for success; challenges overcome; and how the school's effective practices have been implemented elsewhere in the network.
- Thoughtful discussion of a less-than-satisfactory school in the network, including the evidence base for judging the school unsatisfactory; causes of problems; and specific strategies and expectations (performance levels and timeframe) for improvement.
- Evidence of strong academic performance of schools within the network, with a special emphasis on those schools operating in the State of Indiana.
- Strong and transparent financial performance of network schools, as well as for the network organization and any related business entities, demonstrated by a) the last three years of audited financial statements and management letters, and b) the most recent internal financial statements. (The school level, ESP level, and overall operations should be distinctly represented.).

#### Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## Disclosure of Legal Actions

### Evaluation Criteria

A response that meet the standard will address the following:

- Capacity to learn from past challenges/mistakes, including, but not limited to: a) Record of any ESP contract terminations or non-renewals; any charter terminations, non-renewals, shortened or conditional renewals, withdrawals or non-openings; performance deficiencies or violations that have led to formal authorizer intervention (over the past three years); or current or past litigation involving the organization or any of its schools; and b) Thoughtful, well-reasoned and evidence-based discussion of any such experiences by the organization (if applicable). See **Attachment 22** for Litigation Documentation.

### Evaluation

Check one (required)

**Meets the Standard**

**Partially Meets the Standard**

**Approaches the Standard**

**Does Not Meet the Standard**

**Strengths** (Please include page numbers when possible)

**Weaknesses** (Please include page numbers when possible)

**Additional Questions**

## REVIEWER RECOMMENDATION SUMMARY

### Overall Recommendation

After reviewing the full application and documentation, please select below your recommendation for action in this application for a public charter school.

- Deny**
- Approve**
- Approve with Conditions** (indicate conditions below)

### Summary Comments

Summarize your recommendation and assessment of the application focusing on key strengths and/or concerns, as applicable.