



**Charter School Application  
For  
New School Operators**

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## Introduction

Thank you for your interest in applying to the Indiana Charter School Board (“ICSB”) to launch a new charter school. The ICSB is committed to the highest levels of quality for itself and the schools it authorizes. The work of the ICSB is guided by five core principles:

- 1) Students First. When performing its duties, the ICSB always assesses whether its actions will further the best interests of students.
- 2) High Expectations. The ICSB expects the charter schools it authorizes to set high academic achievement expectations, develop strong plans for family and community engagement, and adhere to high ethical standards for students, staff, and board members. Similarly, the ICSB establishes high performance expectations, engagement plans, and ethical standards for itself.
- 3) Excellence in Leadership. Operating a high-performing charter school requires excellent leadership from school boards and staff. The ICSB authorizes schools that can demonstrate strong leadership at both the school governance and administrative levels.
- 4) Commitment to Innovation. The ICSB is particularly interested in operators that show strong potential to accelerate student success through different school models, instructional strategies, uses of technology, staffing models, governance arrangements, family and community engagement strategies, and other approaches.
- 5) Rigorous and Transparent Accountability. The ICSB holds schools accountable for performance through rigorous and transparent accountability mechanisms that uphold schools’ autonomy, foster excellence, and protect student and public interests. In turn, the ICSB is held to a high performance bar by the State Board of Education (“SBOE”).

Each application will be carefully evaluated for its alignment with the ICSB’s core principles and compliance with applicable law. Only those applicants who can demonstrate the capacity to operate high-performing charter schools will receive charters from the ICSB. The final decision on all charter school applications will be made by the ICSB governing board in a public meeting.

## Which Application to Submit

The ICSB offers three types of applications: 1) An Application for New School Operators; 2) An Application for Experienced School Operators; and 3) A Change in Authorizer Request Application.

An applicant group should file an Application for New School Operators if the group has not previously operated a charter school and is not planning to contract with an Education Service Provider (“ESP”) for education management services. Under Indiana Code (“IC”) § 20-24-1-6.1, an ESP is defined as a “for profit education management organization, nonprofit charter management organization, school design provider, or any other partner entity with which a charter school intends to contract for educational design, implementation, or comprehensive management.”

The only time an applicant group who is contracting with an ESP should submit a New School Operator Application is if the ESP has never provided educational design, implementation, or comprehensive management services anywhere in the United States (e.g., it is a newly formed entity). Note that the fact that a member of the proposed

governing body has formerly served on the board of another charter school does not disqualify an applicant group from applying as a New School Operator.

An applicant group should file an Application for Experienced School Operators if either: (a) the group has previously operated a charter school or a network of charter schools; or (b) the group has not previously operated a charter school but intends to contract with an ESP. The Application focuses on an evaluation of the existing school or schools currently managed by the applicant group or ESP, specifically academic and financial performance, and the capacity of the existing governing board to replicate.

An applicant group should file a Change in Authorizer Request Application if it is the governing body of an existing charter school currently not authorized by the ICSB and wishes to change authorizers. There are two types of change in authorizer requests: 1) requests from charter schools “in good standing” who have not received a notice of termination or non-renewal of a charter agreement by the charter school’s current authorizer; and 2) requests from charter schools who have received official notice of termination or non-renewal of its charter agreement by the charter school’s current authorizer.

If you are unsure which application to submit, please contact Amy Osborne, at 317-232.0964 or at [AOsborne@icsb.in.gov](mailto:AOsborne@icsb.in.gov). Additional information and application resources can be found on the ICSB website: <http://www.in.gov/icsb/>.

## Application and Submission Instructions

### Application Process

This version of the Request for Proposal (“RFP”) is designed for applicant groups who have not previously operated a charter school and are not planning to contract with an ESP for education management services. The Application Timeline for the ICSB’s Spring and Fall cycles may be found on the ICSB website: <http://in.gov/icsb/2417.htm>. For the Spring cycle, the ICSB typically releases its RFP in early January. For the Fall Application Cycle, the RFP is typically issued in early July. Please ensure that you check the Application Timeline for the applicable dates.

#### Application for Multiple Charters

An applicant group filing an Application for New School Operators may apply for more than one charter in a single application. However, it is the ICSB’s policy to allow an applicant group that is awarded multiple charters to open a single school in the first year. Once the initial school has been open a sufficient time (typically at least two years) to demonstrate academic performance and financial stability, the organizer may request to open additional schools through the ICSB’s Charter Activation Request Procedure. Applications for more than one charter should address, in all relevant documents and sections, the specific timeline and expectations for the subsequent schools.

#### Letter of Intent

All applicant groups seeking to submit a proposal during an application cycle are required first to submit a non-binding Letter of Intent (“LOI”) indicating their interest in applying to the ICSB. Information contained within the LOI will be utilized for planning purposes by the ICSB, and the legal name of the applicant group will be posted on the ICSB website. The LOI must be submitted by 11:59 p.m. EST by the LOI deadline using the following email address:

[charter-applications@icsb.in.gov](mailto:charter-applications@icsb.in.gov). Please note that there is a customized LOI template for Change in Authorizer Request Applications.

### Application

All applicant groups that submit a fully completed LOI by the LOI deadline are eligible to submit an Application during the applicable cycle.

**Please note that all submissions are final; however, ICSB staff reserves the right to ask for additional information to clarify and/or support specific answers given in the capacity interview. The requested information must be submitted within five business days of the time of the request. No extensions will be granted.**

### Capacity Interview and Public Hearing

After ICSB staff and external experts evaluate the full applications, the applicant group will be interviewed to explore questions and concerns raised by the applications and to assess the capacity of the group to implement the proposed program effectively.

As required by Indiana law, a public hearing will be held to allow for comments from community members about the proposed school. The ICSB hosts public hearings within the school corporation where the proposed charter school will be located (or, if the specific location has not been identified, within the county where the proposed charter school will be located) which are attended by ICSB staff and Board members. The purpose of the public hearing is for ICSB representatives to receive comments from community members about the potential impact of the proposed charter school upon the community. The hearing is not a question and answer session between the public attendees and ICSB representatives or the applicant group.

In addition to, or in lieu of, attending public hearings, community members may submit public comments via email to the following address: [charter-applications@icsb.in.gov](mailto:charter-applications@icsb.in.gov). Please note that all emails are subject to Indiana's public access laws including the Access to Public Records Act ("APRA"), which may be found at IC § 5-14-3. Those submitting a public comment are asked to provide their name and the name of the proposed charter school along with their comment.

### Board Meeting

At least one day prior to the ICSB Board Meeting, ICSB staff will contact the designated representative for the applicant group to inform them of the staff recommendation for the proposed school. At this time, the applicant group may choose to "withdraw" its application from consideration which means that, while ICSB board members will be provided with a copy of the staff recommendation for the school, no discussion or vote will occur with respect to the application. Applicants who withdraw because the staff recommendation is declination or who are declined by the ICSB board may reapply in a later application cycle or to another authorizer.

During the meeting, ICSB board members conduct a question and answer session with the members of the applicant group, hear ICSB staff recommendations, and hold individual votes whether to approve or decline the application. Following the meeting, all decisions of the ICSB board are posted on the ICSB website. The ICSB meeting is open to the public and streamed live over the internet.

## Submission Instructions

### Epicenter

Within one week following the LOI deadline, the applicant group's designated representative will be provided with a link, username and password to the ICSB's web-based submission platform, Epicenter.

Each section of the application is uploaded separately, so applicants may prepare each section as a separate document. Epicenter will not allow final submission of a completed application until all required documents have been uploaded and the application submission checklist has been completed.

Epicenter will automatically shut down access to all applications at 11:59 p.m. EST on the date specified in the Application Timeline. The application must be complete and submitted before that time. For planning purposes, the ICSB recommends that applicants begin uploading the proposal and all required attachments approximately one day prior to the deadline. Please be advised that combining the proposal narrative and required attachments into one PDF file may take some time, so this step in the application preparation process should commence well in advance of the deadline. No hard copy submission or email submission is required.

Please be aware it is the applicant group's responsibility to ensure all application materials are submitted to the ICSB web platform by the established deadline. **Failure to submit a timely or complete application may serve as grounds to reject the application.**

### Specifications

The proposal must be typed and single-spaced, on white, 8.5"x 11" paper, with 1-inch page margins and a minimum of 11-point font. The Proposal Overview and Narrative must be in either Microsoft ("MS") Word or Portable Document ("PDF") format. **PDF documents must be created electronically from the original document files, and should not be scanned from hardcopy documents.** All Attachments must be numbered, clearly labeled, comply with the page limit requirements, and in the format specified in the Application Checklist attached hereto as Exhibit A. If a specific question does not apply to your application, simply respond "Not Applicable."

**Do not exceed the listed page limits. ICSB staff reserve the right to reject an Application or to exclude information from its Application review that exceeds these limits.**

### Notice of Disclosure

*The applicant acknowledges that all information submitted as part of an application (including financial information) is subject to APRA and may be subject to review and copying by the public, including the media, unless either: 1) the applicant specifically requests that certain information be withheld (and cites the appropriate exception to disclosure); or 2) the ICSB independently determines that it must withhold from disclosure certain information in the application. In the event there is a dispute between the ICSB and the applicant as to whether certain information is disclosable, the applicant must obtain an advisory opinion from the State of Indiana's Public Access Counselor supporting the applicant's position. The applicant and its representatives, employees and agents acknowledges and agrees that the ICSB Board members and staff, and any official, agent, employee or representative of the State of Indiana shall not be held liable or legally responsible in any way for any such disclosure pursuant to APRA, and such parties hereby waive any rights to redress or claims of action pursuant to any such disclosure.*

## Proposal Overview

Please complete the Proposal Overview attached hereto as Exhibit B.

## Charter School Proposal

Please respond to the following questions, limiting your narrative response to 50 pages total, excluding attachments.

### Executive Summary

The Executive Summary should provide a concise overview of the school's mission and proposed model or design; the applicant group's capacity to carry out the implementation plan successfully; the targeted community; and the applicant's community engagement to date. In five (5) pages or less, provide an Executive Summary that includes the following elements:

**Mission and Vision.** State the mission and vision of the proposed school. The mission statement provides the foundation for the entire charter school proposal. Accordingly, the rest of the application should fully align with and support the stated mission.

**Educational Need and Target Population.** Identify and briefly describe the targeted community and student population the school proposes to serve. Describe the educational needs and challenges of the targeted community and student population. Explain how the decision to serve the targeted population, including the grade levels you have chosen, meets community needs.

**Community Engagement.** Explain the relationships, if any, that you have already established to engage students, parents, and the community for the proposed school. If you have assessed demand and/or solicited support for the school, briefly describe these activities and the status of your efforts. If specific community needs and/or values have been incorporated into the school design, please provide detail about how the applicant team determined the existence of those needs and/or values and how they are reflected in the school design.

**Education Plan/School Design.** Provide an overview of the school's education program, including key innovations and non-negotiable elements of the school model. Briefly explain the evidence base that demonstrates the school model will be successful in improving academic achievement for the targeted student population.

**Vision for Growth.** Outline your vision and five-year growth plan for the school. If you are planning to add grades or expand enrollment in the second or subsequent years of school operation, explain your plan and rationale.

**Governance and Leadership.** Provide an overview of the school's governance, management structure, and leadership team. Highlight the strengths of the proposed governing board and leadership team. Explain how the governance and management structure will provide for stable, effective governance and leadership for the proposed school.

## Section I: Evidence of Capacity

- 1) Identify the key members of the applicant group, including individuals and/or entities who have contributed substantially to the development of the application or to the school's development, governance, and/or operation. Clearly identify each individual's proposed role (e.g., governing board member, school leader, key staff member, etc.).
- 2) For each individual identified in your answer to Question 1 of this Section, highlight the qualifications for or experience with establishing a high-quality charter public school in Indiana and assuming stewardship of public funds, including capacity in areas such as:
  - a) School leadership, administration, and governance.
  - b) Curriculum, instruction, and assessment.
  - c) Financial, business, and human resources.
  - d) Performance management.
  - e) Parent and community engagement.
  - f) Facilities management
  - g) Legal compliance.
- 3) Please provide, as **Attachment 1**, full resumes (including contact information) for each member of the applicant group including, but not necessarily limited to, all current and proposed governing board members, the school leader, key staff members, and any consultants involved in the application or the school's development, governance and/or operation.
- 4) Describe the governance structure of the proposed school, including description of meetings to date, planned frequency and focus of meetings, standing committees, and compliance with Indiana's Public Access Laws. Explain how the proposed governance structure and composition will help ensure that there will be active and effective oversight of the charter school. Describe the current and desired size and composition of the governing board. In **Attachment 2**, please provide a completed and signed Board Member Information Form, attached hereto as Exhibit C, for each current governing board member.
- 5) If applicable, describe any advisory bodies or councils to be formed, including the roles and duties of that body. Describe the planned composition of the advisory body and the reporting structure as it relates to the governing board and school leadership.
- 6) Explain the process that the school will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure, or practice at the school. Describe the types of corporate or school documents that will be available to parents and how those will be made available.
- 7) If a Principal/Head of School candidate has been identified in your answer to Question 1 of this Section, explain why this individual is qualified to lead the school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record, including specific evidence that demonstrates the leader's capacity to design, launch, and manage a high-performing charter school. If no candidate has yet been identified, provide your timeline, criteria, and process for recruiting and hiring a school leader. Describe the responsibilities of the school's leadership/management team.

- 8) Please identify the individual or individuals who will lead development of the school between the time of authorization and opening. How will this person be compensated?
- 9) If members of the school's administrative/management team (beyond the school leader) have been identified in your answer to Question 1 of this Section, describe their responsibilities and qualifications. If these positions have not yet been filled, explain your timeline, criteria, and process for recruitment and hiring.
- 10) Please describe what and how educational services will be provided (including the names of any service providers), the cost of the services, how costs will be allocated, specific service goals, and who is ultimately responsible for ensuring that the services are being successfully delivered.
- 11) As **Attachment 3**, using the table attached hereto at Exhibit D, please define school and governing board level decision-making authority as it relates to key functions, including curriculum, culture, staffing, corrective actions, etc. Please Indicate where primary authority for each function resides.

## Section II: School Design

### Education Plan

#### Innovation

Although not required, the ICSB is interested in applications that propose school models with strong potential to accelerate student success through different school designs, curriculum, instructional strategies, uses of technology, staffing models, governance arrangements, family and community engagement strategies, and other approaches. Throughout Section II, please summarize any innovation(s) embodied in the proposed school design and/or implementation plan, including:

- 1) An explanation of how the proposed model is different from traditional school models.
- 2) Any available evidentiary basis for the efficacy of the model or for the ideas underlying the model.
- 3) An explanation of how the model will still permit the ICSB to hold the operator to the same high accountability standards to which it holds all authorized schools.

For additional resources and examples of innovative school models that incorporate these elements, see the "Innovation Resources" page at the ICSB website: <http://www.in.gov/icsb/2609.htm>.

#### Curriculum and Instructional Design

- 1) Provide a framework for the proposed instructional design that reflects the needs of the school's target population and will ensure all students meet or exceed the Indiana College and Career Ready Academic Standards adopted by the Indiana State Board of Education in April 2014. More information about the Indiana Academic Standards can be found at <http://www.doe.in.gov/standards>. At a minimum, the description should include:
  - a) The basic learning environment (e.g., classroom-based, independent study, virtual),
  - b) Class size and structure,
  - c) An overview of the curriculum,
  - d) The use of technology in delivering instruction (if applicable),

- e) Plans for ensuring the school is staffed with highly effective teachers, and
  - f) Any relevant evidence-based support.
- 2) Specify instructional strategies that the school will implement to support the education plan and why they are well-suited for your targeted student population. Describe the methods and systems that teachers will use to provide differentiated instruction to meet the needs of all students.
  - 3) As **Attachment 4**, please provide a core curriculum scope and sequence by subject, for each grade level proposed, that demonstrates clear alignment with Indiana's Academic Standards. The scope and sequence should clearly reflect how the school's curriculum is integrated across subjects and grade levels served, and how it will result in proficiency. If the curriculum is not yet fully developed, provide a timeline outlining the curriculum development process (including individuals and/or consultants responsible for this task) during the school's pre-opening year.
  - 4) *For Blended Learning Operators only:* Indiana statute defines a virtual charter school as "any charter school, including a conversion charter school, that provides for the delivery of more than fifty percent (50%) of instruction to students through: (1) virtual distance learning; (2) online technologies; or (3) computer based instruction." Describe the number of hours per day that instruction at your proposed school will be delivered through virtual distance learning, online technologies, and/or computer based instruction. Does your proposed education model meet the definition of a virtual charter school as defined under Indiana law? If yes, please ensure your budget assumptions reflect Indiana's funding formula for virtual charter schools (90% ADM funding).

#### Pupil Performance Standards

Provide the proposed school model's pupil performance standards, consistent with Indiana's Academic Standards. In particular:

- 1) Please provide, in **Attachment 5**, the school's exit standards for graduating students *for each division of the school* as applicable (elementary, middle and/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.
- 2) Explain the school's policies and standards for promoting students from one grade to the next. How and when will promotion and graduation criteria be communicated to parents and students?

#### High School Graduation Requirements (High Schools Only)

High schools approved by the ICSB will be expected to meet Indiana Graduation Requirements, described in IC § 20-32-4, and explained on the Indiana Department of Education ("IDOE") website:

<http://www.doe.in.gov/achievement/curriculum/indianas-diploma-requirements>.

- 1) Explain how the school will meet these requirements. Explain how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements for the school will exceed those required by the State of Indiana, explain any additional requirements.
- 2) Explain how your graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).

- 3) Explain what systems and structures the school will implement for students at risk of dropping out of high school and/or not meeting the proposed graduation requirements.

### School Calendar and Schedule

Please provide, in **Attachment 6**, the school's proposed calendar for the first year of operation, as well as the weekly schedule of classes. Provide an overview of academic and non-academic programs, as well as the total number of instructional days in an academic year. Note the length of the school day, including start and dismissal times. Detail the number of instructional hours/minutes in the day for core subjects such as language arts, mathematics, science, and social studies.

### School Culture

- 1) Describe the culture of the proposed school and how this culture will promote a positive academic environment and reinforce student intellectual and social development. Explain how this culture will be implemented for students, teachers, administrators, and parents starting from the first day of school.
- 2) Summarize, for illustrative purposes, a typical day from the perspective of a student in a grade level of your choice.
- 3) Summarize, for illustrative purposes, a typical day from the perspective of a teacher of any subject or grade of your choice.

### Supplemental Programming

- 1) Will you offer summer school? If so, describe the program(s) to be offered. How many students are expected to attend summer school, and how will they be selected for participation? How many hours and weeks of summer school will you provide, and how will it be funded?
- 2) Describe the extra- or co-curricular activities or programming the school will offer; how often they will occur; and how they will be funded.
- 3) Describe the school's programs or strategies to address student mental, emotional, and social development and health.
- 4) If applicable, describe any other student-focused activities and programs that are integral to your educational and student-development plans.

### Special Populations and At-Risk Students

**IMPORTANT NOTE:** Pursuant to federal and state laws, charter schools are responsible for meeting the needs of all students enrolled at the school, including those identified with special needs. School personnel shall participate in developing Individualized Education Programs ("IEPs"), identify and refer students for assessment of special education needs, maintain records, and cooperate in the delivery of special education instruction and services, as appropriate.

- 1) Summarize the school's overall plan to serve students with special needs, including but not limited to those with IEPs, students with Section 504 plans, English Language Learners ("ELL"), students identified as intellectually gifted, and students at risk of academic failure or dropping out. Identify the special populations and at-risk groups that the school expects to serve, whether through deliberate targeting or otherwise. **NOTE: Questions 2-5 in this section request more detail about how the school will serve each of these student categories. Your response to Question 1 should be a brief summary only.**
- 2) Explain how the school will identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment. Specify the programs, strategies and supports you will provide for students with mild, moderate, and severe disabilities, including:
  - a) How the school will identify students with special education needs.
  - b) The specific, evidence-based instructional programs, practices, and strategies the school will employ to provide a continuum of services, ensure students' access to the general education curriculum, and ensure academic success for students with special education needs.
  - c) How the school will regularly evaluate and monitor the progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student's goals set forth in the IEP.
  - d) If applicable, the school's plan for promoting graduation for students with special education needs.
  - e) How the school will provide qualified staffing for students with special education needs.
- 3) Explain how the school will meet the needs of ELL students, including:
  - a) How the school will identify ELL students.
  - b) The specific instructional programs, practices and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students.
  - c) How the school will assess and monitor the progress and success of ELL students, including exiting students from ELL services.
  - d) How the school will provide qualified staffing for ELL students.
- 4) Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies and supports you will provide for these students.
- 5) Explain how the school will identify and meet the needs of intellectually gifted students, including:
  - a) The specific evidence-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.
  - b) How the school will provide qualified staffing for intellectually gifted students.
  - c) How the school will assess and monitor the progress and success of intellectually gifted students.

#### Student Recruitment and Enrollment

- 1) Explain the plan for student recruitment and marketing that will provide equal access to any family interested in the new school. Explain how this strategy will garner the targeted enrollment.
- 2) Please provide, as **Attachment 7**, the school's Enrollment Policy, which should include the following:
  - a) Any admission requirements, including an explanation of the purpose of any pre-admission activities for

- students or parents.
- b) Tentative dates for the application period, including enrollment deadlines and procedures, and an explanation of how the school will receive and process Intent to Enroll forms.
  - c) Tentative lottery dates and procedures.
  - d) Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.

### Student Discipline

- 1) Describe the philosophy of student discipline that supports your school model, including how it is appropriate for your target population, and how discipline practices and procedures will be monitored to ensure legal and policy compliance.
- 2) Please provide, as **Attachment 8**, the school's Discipline Policy, which should include a summary of the following:
  - a) Practices the school will use to promote good discipline in the school, including both penalties for infractions and incentives for positive behavior.
  - b) A preliminary list of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended or expelled, respectively.
  - c) An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings.
  - d) A description of the appeal process that the school will employ for students facing expulsion.
  - e) How students and parents will be informed of the school's discipline policy.

### **Parents and Community**

- 1) What other school options exist in the targeted location for your proposed school? In list or table format, please describe all other schools – traditional public, charter and/or private – in the immediate vicinity with the same or similar grade level configuration. In the list or table, please include the following information for each school: the most recent enrollment figures by grade level, and the school's most recent letter grade as reported by IDOE. This information can be found on the IDOE COMPASS website:  
<http://compass.doe.in.gov/dashboard/overview.aspx>.
- 2) How have you determined that the proposed school will have sufficient demand from student and families to meet enrollment projections?
- 3) Describe how you will engage parents in the school, starting from the time that the school is approved. How will the school build family-school partnerships to strengthen support for learning and encourage parental involvement? Describe any commitments or volunteer activities the school will seek or offer to parents.
- 4) What community resources will be available to students and parents? Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Describe any fee-based or in-kind commitments from community organizations or individuals that would enrich student learning opportunities.

- 5) Please provide, as **Attachment 9**, evidence of demand from the community, evidence of community engagement, and evidence of support from community partners. This attachment, may include documentation of public forums held, meetings with community leaders (e.g., mayors, council members, neighborhood leaders), letters of intent and/or memoranda of understanding, and should specify the resources to be committed or contributed from the partner, as applicable. Please address, either in **Attachment 9** or in the narrative, a detailed plan to accomplish successful community engagement during the school's pre-opening period and leading into the school's first year.

## Performance Management

*The ICSB will evaluate each charter school's performance annually and for renewal purposes according to a set of academic, financial and organizational compliance performance standards that are incorporated into the charter agreement. The academic performance standards will consider proficiency, growth and comparative performance based on state standards and ICSB policies. A complete description of the ICSB Accountability System, including the required Accountability Plan performance indicators incorporated into each school's charter agreement, is available on the ICSB website: <http://www.in.gov/icsb/2434.htm>.*

- 1) Apart from the indicators and measures described above, what other student performance goals does the governing board expect the school to achieve by the end of the first 5-year charter term? Goals must be specific and measurable, and must include a timeline by which the governing board will determine whether or not the school has achieved those student performance goals. Note: Goals may include both academic proficiency goals as well as non-academic measures, e.g. attendance, discipline, retention, participation in extra-curricular activities.
- 2) In addition to mandatory state assessment and testing requirements (e.g., ISTEP+, IREAD-3, ISTAR, and GQE), identify the primary interim assessments the school will use to assess student learning needs and progress throughout the year (e.g., DIBELS, Acuity, TABE). IDOE guidelines about formative/interim assessments and the formative assessment grant can be found here: <http://www.doe.in.gov/assessment/formative-assessment-grant>.
- 3) Explain how the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. If known, identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data.
- 4) Describe the information system the school will use to manage student performance data. Identify the staff member(s) who will be responsible for warehousing the data, interpreting the data for classroom teachers, and leading or coordinating professional development to improve student achievement.
- 5) Explain the training and support that school leadership and teachers will receive in analyzing, interpreting, and using performance data to improve student learning.
- 6) Describe the corrective actions the organization will take if the school falls short of student academic achievement expectations or goals as established by the ICSB. Explain what would trigger such corrective actions and who would be responsible for implementing them.

## Section III: Implementation Plan

### Legal Status and Governing Documents

- 1) For the entity proposing to hold the charter, please provide, as **Attachment 10**, copies of the following governance documents:
  - a) 501(c)(3) Determination Letter ([Letter 947](#)) from the Internal Revenue Service (“IRS”) or evidence that the applicant has applied for federal tax-exempt status from the IRS acknowledging receipt of the exemption application ([IRS Notice 3367](#)). Click on either link to see examples of each. Information on Applying for 501(c)(3) Tax-Exempt Status can be found on the IRS website in [Publication 4220](#). The ICSB awards charters only to Indiana nonprofit corporations that either have received, or have applied for, federal tax-exempt status from the IRS. **A proposal will be considered incomplete if the applicant does not meet these criteria.**
  - b) Articles of Incorporation;
  - c) Board Bylaws;
  - d) Code of Ethics policy; and
  - e) Conflict of Interest policy.

If the Application is being submitted by an existing nonprofit organization *other than* an organization recognized by the State and the IRS to operate a charter school, describe what steps the existing board will take to transform its board membership, mission and bylaws, and IRS designation to support the charter school.

- 2) Pursuant to IC § 20-24-3-3, the organizer’s Articles or Bylaws must contain a clause providing the following:

*“Upon dissolution: (1) the remaining assets of the charter school shall be distributed first to satisfy outstanding payroll obligations for employees of the charter school, then to creditors of the charter school, then to any outstanding debt to the common school fund; and (2) remaining funds received from the department shall be returned to the department not more than thirty (30) days after dissolution. If the assets of the charter school are insufficient to pay all parties to whom the charter school owes compensation under subdivision (1), the priority of the distribution of assets may be determined by a court.”*

- 3) As **Attachment 11**, please provide a single complete Statement of Assurances form, attached hereto as Exhibit E, signed by an authorized representative of the applicant group.

### Human Capital

#### School Staffing Structure

Please provide, as **Attachment 12**, an organizational chart for the proposed school at Year 1 and at Full Capacity. The chart should identify all administrative, operational, instructional and non-instructional personnel, as well as any paraprofessionals or specialty teachers. The organizational chart should clearly delineate the roles and responsibilities of the governing board and staff.

### School Leadership & Staff Hiring, Management and Evaluation

- 1) Describe your strategy and timeline for recruiting and hiring teachers in accordance with IC § 20-24-6. Explain key selection criteria and any special considerations relevant to your school design. What key partnerships will support staff hiring? Identify known sources from which you will recruit teachers.
- 2) Describe the staffing plan (e.g., leadership, instructional, and support roles; reporting relationships; and accountability for student outcomes) your school will use to ensure that every student has access to excellent teaching. Will the staffing model incorporate technologies, new roles for teachers and other staff, or innovative instructional techniques toward that end? If yes, how?
- 3) Explain how – and how frequently – the school will evaluate the performance of the school leader and teachers. What key elements will drive evaluations, and who will conduct them?
- 4) Explain how the school will handle unsatisfactory leadership or teacher performance, as well as leadership/teacher changes and turnover. How will the school identify and address development needs or concerns?
- 5) Provide an overview of the school's compensation system (including benefits) and how this aligns with the performance evaluation process. For legislative requirements regarding employee benefits, see, for example: IC § 20-24-6-7.

### Professional Development

- 1) Describe the professional development that will be offered to school leadership and teaching staff.
- 2) Describe how school leaders will be supported and developed throughout the year.
- 3) Explain how professional development for the faculty will support the education program and build capacity to improve student achievement.
- 4) Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods. If known, please describe the individuals or organizations who will provide professional development services.
- 5) Include the expected number of days/hours for professional development throughout the school year and explain how the school's calendar, weekly schedule, and staffing plan will be structured to accommodate this plan. Explain how professional development will be aligned with the interim assessment process and adjusted during the year to address areas of need that are identified.
- 6) Explain how the professional development program will be evaluated to assess its effectiveness and success.

## Start-Up and Operations

- 1) Please provide, as **Attachment 13**, a detailed start-up plan for the period leading up to the first day of student attendance for the proposed school. The Start-Up Plan must indicate the targeted first day (month, day, year) of student attendance and must specify planning tasks by month, and the individuals responsible for each task.
- 2) If the school will provide transportation, describe the transportation arrangements for prospective students. In addition to daily transportation needs, describe how the school plans to meet transportation needs for field trips and athletic events. Describe how the school will comply with the federal McKinney-Vento Homeless Assistance Act, 42 USC 11431, for homeless students, as well as the Individuals with Disabilities Education Act and 511 IAC 7-43-1(u).
- 3) Provide the school plan for safety and security for students, the facility, and property. Explain the types of security personnel, technology, equipment, and policies that the school will employ.
- 4) Technology Specifications and Requirements (*for Blended Learning and Virtual Operators only*).
  - a) 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 and families will be responsible for purchasing or obtaining.
  - b) 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 the support will be accessible to students and school employees.
  - c) Describe the school's data retention, security, and confidentiality procedures.
  - d) 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 areas of the state that do not have the minimum bandwidth (if applicable).
  - e) Describe data protection and recovery procedures in event of catastrophic system failure (include offsite back-up).
- 5) Charter schools authorized by the ICSB are required to indemnify the ICSB, any related entities, and their respective members, officers, employees, officials and agents. In addition, charter schools must obtain liability insurance coverage naming the ICSB as Additional Insured on a primary basis. Please provide, as **Attachment 14**, an estimate from an insurance agent/broker for insurance coverage that aligns with ICSB insurance requirements. A copy of these requirements is posted on the ICSB website: <http://www.in.gov/icsb/2441.htm>.

## Facility Plan

*Note: Virtual operators should tailor their responses to this section as applicable for their specific instructional and operational models.*

- 1) If you are in the process of identifying a facility, describe with as much detail as possible the viable facility options that your team has identified. Include in this section how you selected a target location, any brokers or consultants you are employing to navigate the real estate market, plans for renovations, timelines, financing, etc.

Describe the organization's capacity and experience in managing compliance with state and local health and safety requirements as described in IC §§ 20-26-7, 20-24, and as required by the Indiana State Department of Health, Office of the State Fire Marshall, Department of Public Works, and the corresponding local agencies, including managing build-out and/or renovations. Detail the specific interactions the applicant group has had with state and local agencies to determine whether the identified facilities are suitable and affordable. Explain the inputs, including specific sources of information, the applicant group has used to project all facility related costs. These inputs should be reflected in the facility related expenses included in your 5-Year Budget.

- 2) If you have already identified a facility, or plan to locate the new school within a facility currently owned or leased by the applicant, please indicate the street address and the school district in which the building is located. Describe the facility, including whether it is new construction, part of an existing public or private school building, or part of another type of facility. Provide a detailed list of any anticipated construction or renovation costs (these should be described in the budget narrative and reflected in the budget). If possible, provide a layout and description of the proposed facility. Include the number and size of classrooms, common areas, recreational space, any community facilities, and any residential facilities. Explain how the facility will meet the needs of any students who are physically challenged.

## Budget and Finance

*Schools chartered by the ICSB are required to adhere to Generally Accepted Accounting Principles ("GAAP") and use the accrual-basis method of accounting. Schools are also required to comply with all relevant policies as required under Indiana statute by the Indiana State Board of Accounts ("SBOA"): <http://www.in.gov/sboa/>. For more specific information, refer to the SBOA charter school webpage: <http://www.in.gov/sboa/4845.htm>.*

- 1) Describe the systems and processes by which the school will manage accounting, purchasing, payroll, and the required annual audit. Specify any administrative services expected to be contracted for the school. Describe the school's financial/internal controls.
- 2) Please provide, as **Attachment 15**, a detailed 5-Year Pro-Forma Budget for the school, including the Start-Up year, by completing the Budget and Staffing Workbook Template which can be found on the ICSB website: [http://www.in.gov/icsb/files/ICSB\\_Budget\\_Application\\_Form.xls](http://www.in.gov/icsb/files/ICSB_Budget_Application_Form.xls).
- 3) Please provide, as **Attachment 16**, a detailed budget narrative that provides a high-level summary of the budget and how the budget aligns with the 5-Year business plan. The budget narrative should clearly describe assumptions and revenue estimates, including but not limited to the basis for Per-Pupil Revenue projections, staffing levels, facilities expenses, and technology costs. The narrative should specifically address:
  - a) The degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising).
  - b) The school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than the estimated budget.
  - c) How the school will ensure it has sufficient funds to cover all anticipated expenses, including but not limited to: (a) start-up costs, (b) any special education costs incurred, (c) any transportation costs necessary to ensure the school will be accessible for all enrolled students, and (d) required retirement plan contributions.

**NOTE:** You may refer to the *Data Visualization Tool* (created by Indiana University's Center for Evaluation & Education Policy) listing 2015-2017 estimated per-pupil funding amounts for existing Indiana charter and district schools to help in your planning purposes. The Tool may be found here: [http://ceep.indiana.edu/policy/tools\\_resources/biennium\\_school\\_funding\\_changes.html](http://ceep.indiana.edu/policy/tools_resources/biennium_school_funding_changes.html). **This tool may be used for estimate purposes only.** Applicants are encouraged to contact the IDOE's Office of School Finance at (317)232-0840 for more specific guidance about Per-Pupil Revenue for budget planning purposes. Note that all budgets should assume a July 1-June 30 fiscal year.

- 4) **Additional Requirement for Pre-Existing Non-Profit Organizations:** If a pre-existing non-profit organization will be the charter holder/governing entity, please provide the following as **Attachment 17:** (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.

### Submission of Full Application

As **Attachment 18**, please attach one PDF file that contains all application components, including the Proposal Overview, the Proposal Narrative, and all required Attachments. This PDF file will be posted on the ICSB website as required under Indiana law and in accordance with ICSB policy. Therefore, please be certain that this attachment contains no confidential personal information. In addition, please adhere with the guidelines provided under the Notice of Disclosure section on page 6 of this RFP for any other information considered confidential.

Exhibit A

**Application Checklist**

| #  | Document  | Page Limit                       | Format                        | Completed                |
|----|---|----------------------------------|-------------------------------|--------------------------|
|    | Proposal Overview   | Use Template in <u>Exhibit B</u> | PDF                           | <input type="checkbox"/> |
|    | Proposal (including Executive Summary)                                  | 50                               | MS Word or PDF                | <input type="checkbox"/> |
| 1  | Applicant Group Resumes   | None                             | MS Word or PDF                | <input type="checkbox"/> |
| 2  | Board Member Information Form (completed by each proposed board member) | Use Template in <u>Exhibit C</u> | PDF                           | <input type="checkbox"/> |
| 3  | Decision-Making Authority   | Use Template in <u>Exhibit D</u> | PDF                           | <input type="checkbox"/> |
| 4  | Course Scope and Sequence   | 30 pages                         | MS Word or PDF                | <input type="checkbox"/> |
| 5  | Academic and Exit Standards   | 15 pages                         | MS Word or PDF                | <input type="checkbox"/> |
| 6  | School Calendar and Schedule  | 10 pages                         | MS Word or PDF                | <input type="checkbox"/> |
| 7  | Enrollment Policy   | 10 pages                         | MS Word or PDF                | <input type="checkbox"/> |
| 8  | Student Discipline Policy   | 10 pages                         | MS Word or PDF                | <input type="checkbox"/> |
| 9  | Evidence of Support from Community Partners                             | None                             | MS Word or PDF                | <input type="checkbox"/> |
| 10 | Governance Documents  | None                             | MS Word or PDF                | <input type="checkbox"/> |
| 11 | Statement of Assurances (only one form required)                        | Use Template in <u>Exhibit E</u> | PDF                           | <input type="checkbox"/> |
| 12 | Organizational Chart  | 5 pages                          | MS Word or PDF                | <input type="checkbox"/> |
| 13 | Start-Up Plan   | 10 pages                         | MS Word, Excel, or PDF        | <input type="checkbox"/> |
| 14 | Insurance Coverage  | None                             | MS Word or PDF                | <input type="checkbox"/> |
| 15 | Budget and Staffing Workbook  | Use required template            | MS Excel (no PDF submissions) | <input type="checkbox"/> |
| 16 | Budget Narrative  | 5 pages                          | MS Word or PDF                | <input type="checkbox"/> |
| 17 | Existing Non-Profit Entity Financials (if applicable)                   | None                             | MS Excel, Word, or PDF        | <input type="checkbox"/> |

| #  | Document   | Page Limit | Format | Completed                |
|----|--|------------|--------|--------------------------|
| 18 | Entire Application (excluding items exempt from Indiana's Public Access Laws <b>assuming prior written approval from Indiana's Public Access Counselor</b> ) |            | PDF    | <input type="checkbox"/> |

Exhibit B

**Proposal Overview**

The applicant group's **designated representative** will serve as the contact for all communications, interviews, and notices from the ICSB regarding the submitted application.

**IMPORTANT NOTE:** *The full application, including this form, will be posted on the ICSB website. Applicants are advised that local community members, including members of the media, may contact the designated representative for questions about the proposed school(s).*

**Name of proposed Charter School:** \_\_\_\_\_

**Proposed Charter School location:\*** \_\_\_\_\_

*\*Please indicate the city/town and, if known, potential address or neighborhood of the school location. Virtual operators should indicate the relevant geographies the operator intends to serve.*

**School district of proposed location:** \_\_\_\_\_

**Legal name of group applying for Charter:** \_\_\_\_\_

**Designated representative:** \_\_\_\_\_

**Contact Information (Phone & Email):** \_\_\_\_\_

**Planned opening year for the school:** \_\_\_\_\_

**Model or focus of proposed school:**  
(e.g., arts, college prep, dual-language, etc.) \_\_\_\_\_

**Proposed Grade Levels and Student Enrollment**

Indicate the grade levels the school intends to serve. Specify both the planned and maximum number of enrolled students by grade level for each year.

| Academic Year | Grade Levels | Student Enrollment (Planned/Maximum) |
|---------------|--------------|--------------------------------------|
| Year 1        |              |                                      |
| Year 2        |              |                                      |
| Year 3        |              |                                      |
| Year 4        |              |                                      |
| Year 5        |              |                                      |
| At Capacity   |              |                                      |

**Target student population (if any):** \_\_\_\_\_

Will an application for the same charter school be submitted to another authorizer in the near future?

Yes  No

If yes, identify the authorizer(s): \_\_\_\_\_

Planned submission date(s): \_\_\_\_\_

Please list the number of previous submissions (including withdrawn submissions) for request to authorize any charter school(s) over the past five years, as required under IC § 20-24-3-4. Include the following information:

Authorizer(s): \_\_\_\_\_

Submission date(s): \_\_\_\_\_

Signature of Applicant's Designated Representative

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Exhibit C

**Charter School Board Member Information Form**

*(To be completed individually by each proposed board member for the charter holder)*

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

As part of the application for a new charter school, the Indiana Charter School Board requests that each prospective 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 applicant group behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

**Background**

1. Name of charter school on whose board of directors you intend to serve:
  
2. Your full name:
  
3. Brief educational and employment history (no narrative response is required if your resume is attached to the application as part of **Attachment 1**).  
 Resume is attached. **Please do not include a resume in both Attachment #1 and #2.**
  
4. Describe any previous experiences relevant to serving on the board of a charter school (including other board experience, or any experience overseeing start-up or entrepreneurial ventures). If you have not had previous board experience, explain why you believe that you will be an effective board member.
  
5. Do you understand the obligations of a charter school's board of directors to comply with Indiana's Public Access laws, including the Open Door Law for Board meetings?  
 Yes     Don't Know/ Unsure

**Disclosures**

1. Indicate whether you or your spouse knows any other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.  
 I/we do not know any such trustees     Yes
  
2. Indicate whether you or your spouse knows anyone who is conducting, or plans to conduct, business with the charter school (whether as an individual or as a director, officer, employee or agent of another entity). If so, indicate and describe the precise nature of your relationship and the nature of the business.

I/we do not know any such persons.  Yes

3. 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

4. If the school intends to contract with an Education Service Provider, 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  I/we do not know any such persons  Yes

5. 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.

Not applicable  I/we have no such interest  Yes

6. 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.

Not applicable  I/we or my family do not anticipate conducting any such business  Yes

7. 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

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

None  Yes

|  |             |
|--|-------------|
| I, certify to the best of my knowledge and ability that the information I am providing to the Indiana Charter School Board as a prospective board member for the above proposed charter school is true and correct in every respect. |             |
| <u>Name and Title</u>  | <u>Date</u> |
| <u>Signature</u>   |             |

Exhibit D

**Decision-Making Authority**

| <u>Function</u>  | <u>Governing Board</u> | <u>School</u> |
|--|------------------------|---------------|
| <u>Performance Goals</u>                               |                        |               |
| <u>Curriculum</u>                                      |                        |               |
| <u>Professional Development</u>                        |                        |               |
| <u>Data Management and Interim Student Assessments</u> |                        |               |
| <u>Grade Level Promotion Criteria</u>                  |                        |               |
| <u>Culture</u>   |                        |               |
| <u>Budgeting, Finance, and Accounting</u>              |                        |               |
| <u>Student Recruitment</u>                             |                        |               |
| <u>School Staff Recruitment and Hiring</u>             |                        |               |
| <u>HR Services (payroll, benefits, etc.)</u>           |                        |               |
| <u>Development</u>                                     |                        |               |
| <u>Community Relations</u>                             |                        |               |
| <u>Information Technology</u>                          |                        |               |

| <u>Function</u>                            | <u>Governing Board</u> | <u>School</u> |
|--|------------------------|---------------|
| <u>Facilities Management</u>               |                        |               |
| <u>Vendor Management / Procurement</u>     |                        |               |
| <u>Other Operational Functions, if any</u> |                        |               |

Exhibit E

**Statement of Assurances**

The charter school agrees to comply with all of the following provisions: (*Read and check*)

- 1. A resolution or motion has been adopted by the charter school applicant's governing body that authorizes the submission of this application, including all understanding and assurances contained herein, directing and authorizing the applicant's designated representative to act in connection with the application and to provide such additional information as required.
- 2. Recipients operate (or will operate if not yet open) a charter school in compliance with all federal and state laws, including Indiana Charter Schools Law as described in all relevant sections of IC § 20-24.
- 3. Recipients will, for the life of the charter, participate in all data reporting and evaluation activities as required by the ICSB and the Indiana Department of Education. See in particular IC § 20-20-8-3 and relevant sections of IC § 20-24.
- 4. Recipients will comply with all relevant federal laws including, but not limited to, the *Age Discrimination in Employment 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, Part B of the *Individuals with Disabilities Education Act*, and section 427 of the *General Education Provision Act*.
- 5. Recipients will comply with all provisions of the Non regulatory Guidance—Public Charter Schools Program of the U.S. Department of Education, which includes the use of a lottery for enrollment if the charter school is oversubscribed, as well as with applicable Indiana law. See also relevant sections of IC § 20-24.
- 6. Recipients shall ensure that a student's records, and, if applicable, a student's individualized education program as defined at 20 U.S.C. § 1401(14) of the *Individuals with Disabilities Education Act*, will follow the student, in accordance with applicable federal and state law.
- 7. Recipients will comply with all provisions of the *Elementary and Secondary Education Act of 1965, as amended by the Every Student Succeeds Act of 2015 ("ESSA")*, 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 ("FERPA") and assessments.
- 8. Recipients will operate with the organizer serving in the capacity of fiscal agent for the charter school and in compliance with generally accepted accounting principles.
- 9. Recipients will at all times maintain all necessary and appropriate insurance coverage.
- 10. Recipients will indemnify and hold harmless the ICSB, the State of Indiana, all school corporations providing funds to the charter school (if applicable), and their officers, directors, agents and employees, and any

successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation.

11. Recipients understand that the ICSB may revoke the charter if the ICSB deems that the recipient is not fulfilling the academic goals, fiscal management, or legal and operational responsibilities outlined in the charter.

**Signature from Authorized Representative of the Charter School Applicant**

I, the undersigned, am an authorized representative of the charter school applicant and do hereby certify that the information submitted in this application is accurate and true to the best of my knowledge and belief. In addition, I do hereby certify to the assurances contained above.

Name and Title

DATE

Signature