

**TENNESSEE CHARTER SCHOOL APPLICATION SCORING  
CRITERIA**

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**Ratings and Criteria**

State law and regulation require the Tennessee Department of Education to provide “a standard application format” ([TCA 49-13-116](#)), and “scoring criteria addressing the elements of the charter school application” ([SBE Rule 0520-14-01-.01\(1\)](#)).

This scoring rubric is divided into subsections that correspond to the subsections of the charter application. Each subsection of the rubric identifies the characteristics of a strong response that would qualify as “Meets or Exceeds the Standard.” Evaluators will rate the responses by applying the following guidance:

<b>Rating</b>	<b>Characteristics</b>
<b>Meets or Exceeds the Standard</b>	The response reflects a thorough understanding of key issues. It clearly aligns with the mission and vision of the school. The response includes specific and accurate information that shows thorough preparation.
<b>Partially Meets Standard</b>	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.
<b>Does Not Meet Standard</b>	The response is significantly incomplete; demonstrates lack of preparation; does not align with the mission and vision of the school; or otherwise raises significant concerns about the viability of the plan or the applicant’s ability to carry it out.

The State Board of Education has adopted Quality Charter Authorizing Standards in [Policy 6.111](#). Standard 2(c) addresses rigorous approval criteria for the application process and decision making. This Standard provides that a quality authorizer “[r]equires all applicants to present a clear and compelling mission, a quality educational program, a demonstration of community support, a solvent and sustainable budget and contingency financial plans, a clear demonstration of the effectiveness of the model for the target student population, effective governance and management structures and systems, founding team members demonstrating diverse and necessary capabilities in all phases of the school’s development, and clear evidence of the applicant’s capacity to execute its plan successfully.” An application that merits a recommendation for approval should satisfy each of these criteria.

Recommendations for approval or denial will be based on the written application (narrative and attachments), independent due diligence, and, if offered by the authorizer, applicant interviews. Ratings for each of the subsections under one of the four categories (academics, operations, finances, and, if applicable, performance record) shall be averaged to determine the summary rating for that category. For an application to be deemed ready for approval, the summary rating for all applicable categories must meet or exceed the standard.

Tennessee law states, "An authorizer's approval of a public charter school application must be in the form of a written charter agreement signed by the sponsor and the authorizer, which shall be binding upon the governing body of the public charter school. The charter agreement for a public charter school must be in writing and must contain all material components of the approved application required under § 49-13-107(b)" ([TCA 49-13-110\(a\)](#)). Thus, an initial or amended charter application, to be approved, must be ready to be incorporated into a charter agreement.

### **Guidance for Reviewers:**

Reviewers should use objective language and complete sentences in their comments on the strengths and weaknesses of each subsection of the application. Please also remember that all documents, including your individual review, may at some time be available to the public. Additional pages should be used as necessary. For example,

#### **Strengths of the academic plan**

"The plan aligns with the overall mission and vision because . . ."

"The chosen curriculum is research-based and proven effective with the targeted population of students because . . ."

#### **Weaknesses of the academic plan**

"The curriculum and daily schedule do not align with the mission and vision because . . ." "The discipline plan does not include provisions for students with disabilities."

#### **Strengths of the operations plan**

"The governing body is diverse and will be able to support the school effectively."

"The plan to recruit school leaders and teachers is robust and aligns with the mission of the school."

#### **Weaknesses of the operations plan**

"The governing body is composed of only two people who do not have sufficient credentials to support school leadership."

"The staffing projections do not align with the number of students or the stated mission of the school."

#### **Strengths of the financial plan**

"The financial plan is sound and the assumptions are consistent with the mission and vision of the proposed school."

"The budget assumptions include contingencies for high-dollar special needs students and funds are allocated in the budget document for such contingencies."

#### **Weaknesses of the financial plan**

"The budget assumptions include a line of credit from XYZ bank, but there is no proof such an agreement exists, and no plan to repay the line of credit when it is accessed." "The proposed school assumes two buses in the first year, but there is no accompanying line item in the budget that allocates funds for purchasing buses nor is there any indication of salary and training for bus drivers."

**Instructions for Reviewers:**

1. Fill in your name and the name of the proposed school on the following page. Click once on the grey boxes to begin typing.
2. Check the **General Information** page of the application to determine which subsections the applicant was required to complete. The table below contains the required sections per applicant type.

<b>Category</b>	<b>APPLICANT TYPE</b>	<b>DESCRIPTION</b>	<b>REQUIRED SECTIONS</b>
1	New-start applicant	Sponsor with no existing schools	<ul style="list-style-type: none"> <li>• Academic Plan Design and Capacity: <b>1.1 through 1.12</b></li> <li>• Operations Plan and Capacity: <b>2.1 through 2.11</b></li> <li>• Financial Plan and Capacity: <b>3.1 and 3.2</b></li> </ul>
2	Existing Tennessee operator proposing new focus/grade structure  <i>OR</i>  Existing non-Tennessee operator	Operator with existing schools in Tennessee proposing to change the focus and/or grade structure of an existing school  <i>OR</i>  Operator with existing schools outside of Tennessee	<ul style="list-style-type: none"> <li>• Academic Plan Design and Capacity: <b>1.1 through 1.12</b></li> <li>• Operations Plan and Capacity: <b>2.1 through 2.15</b></li> <li>• Financial Plan and Capacity: <b>3.1 through 3.3</b></li> <li>• Portfolio Review and Performance Record: <b>4.1</b></li> </ul>
3	Existing Tennessee operator proposing to replicate an existing school	Operator with existing schools in Tennessee proposing to start a new school with no material change in focus or grade structure of an existing school	<ul style="list-style-type: none"> <li>• <b>Submit original application</b></li> <li>• Academic Plan Design and Capacity: <b>1.2, 1.3(i), 1.5, 1.8, 1.11, and 1.12</b></li> <li>• Operations Plan and Capacity: <b>2.12 through 2.15</b></li> <li>• Financial Plan and Capacity: <b>3.1, through 3.3</b></li> <li>• Portfolio Review and Performance Record: <b>4.1</b></li> </ul>
4	Existing operator of a charter school in the Achievement School District (ASD) moving to a non-ASD authorizer	Operator with an existing school in the ASD proposing to move to its home district pursuant to an ASD School Exit Plan	<ul style="list-style-type: none"> <li>• <b>Submit original application</b></li> <li>• Academic Plan Design and Capacity: <b>1.2, 1.3(i), 1.7(a), 1.8, 1.11, and 1.12</b></li> <li>• Operations Plan and Capacity: <b>2.2, 2.3, 2.7, 2.9(g), and 2.10(b)</b></li> <li>• Financial Plan and Capacity: <b>3.1 and 3.2</b></li> <li>• Portfolio Review and Performance Record: <b>4.1</b></li> </ul>

3. For each required subsection of the application, you should do the following during your initial individual analysis of the proposal:
  - a. Select a rating for each subsection. Click once on the box to select. If you are not able to check the box, **please HIGHLIGHT your selection.**
  - b. Use the “Strengths” area to identify notable positive aspects of the response. Be sure to include page references where applicable.
  - c. Use the “Concerns/Questions” area to identify weaknesses and areas that should be explored during the debrief calls and/or capacity interview. Again, reference relevant page numbers.
4. Complete the summary page for each major section (academic, operations, and financial) after you have completed all of the subsections within the section. Type a summary of your analysis of each section into the box provided; it will expand as needed. This should be a paragraph outlining the overall strengths or weaknesses of the section as a whole. It should summarize your findings and should not be simply copied from your subsection analysis.
5. Use the “Final Application Review” area to provide your final evaluation of each subsection based on the complete application record (initial proposal, due diligence, capacity interview, and amended application, if applicable). This analysis should support the final rating you select.
6. Complete the “Final Application Review” area on the summary page for each major section. Document any additional evidence gathered during due diligence, the capacity interview and/or amended application and indicate your final rating for each major subsection.

Your comments and evidence are at least as significant as your rating. Please also remember that all documents, including your individual review, may at some time be available to the public.

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Evaluator Name: \_\_\_\_\_

Proposed School Name: \_\_\_\_\_

Application includes an Executive Summary.

Yes

No

**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.1 SCHOOL MISSION AND VISION</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The mission statement is clear, concise, compelling and measurable.</li> <li>▪ The applicant clearly links the mission and vision to at least 3 of the purposes for charter schools found in T.C.A. § 49-13-102(a).</li> <li>▪ When achieving its mission, the school, as described by the applicant, will offer a strong curriculum and a range of opportunities to all students and will close achievement gaps.</li> <li>▪ The innovations described by the applicant are supported by evidence of success.</li> </ul>		
<b>Initial Application Review</b>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.2 ENROLLMENT SUMMARY</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant clearly describes the community from which the school intends to draw students, including demographics, school zones and academic performance of existing schools.</li> <li>▪ The applicant provides a sound rationale for selecting the community where the school will locate.</li> <li>▪ The enrollment summary and demographics charts are complete and contain reasonable enrollment projections.</li> <li>▪ For existing operators, the use of different enrollment practices is clearly explained.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.3 ACADEMIC FOCUS AND PLAN</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The school's academic focus aligns with the school's mission and vision.</li> <li>▪ The academic plan is rigorous and research-based, addresses the needs of the targeted student population, and implements the school's academic focus.</li> <li>▪ The curriculum is robust, supports the growth of all students, and is aligned with Tennessee State Standards.</li> <li>▪ If the academic plan includes blended learning, the applicant clearly explains the model the school will use and the role of teachers within the blended learning environment.</li> <li>▪ The applicant clearly describes an evidence-based plan to help remediate students' academic underperformance.</li> <li>▪ An existing operator identifies key features of the existing academic plan that will differ from the operator's existing schools and a strong rationale for these variances.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.4 ACADEMIC PERFORMANCE STANDARDS</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Academic achievement goals are rigorous, measurable, and realistic and set high standards and high expectations for student learning.</li> <li>▪ Academic goals support the mission and vision of the school.</li> <li>▪ The applicant outlines a distinct process for measuring, monitoring, and revising academic achievement goals.</li> <li>▪ There is an appropriate, well-defined corrective action plan to be implemented if the school falls below state, district and/or its own academic achievement goals.</li> <li>▪ The applicant outlines a strong plan for Response to Instruction and Intervention (RTI<sup>2</sup>) that aligns with Tennessee guidelines.</li> <li>▪ Student attendance goals are realistic and plans to ensure high rates of student attendance and address chronic absenteeism are clearly outlined.</li> <li>▪ The school's promotion/retention and exit policies and standards are rigorous and clearly defined.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.5 PHASE-IN/TURNAROUND – IF APPLICABLE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant has strong prior experience in turning around or converting an underperforming school, or a plan for doing so if the applicant does not have prior experience.</li> <li>▪ There is a detailed plan for engaging the neighborhood, community, and student population prior to conversion.</li> <li>▪ The applicant identifies specific ways to transform the existing school culture while respecting the school's history.</li> <li>▪ If proposing a phase-in approach, the applicant clearly describes how transition to a shared campus will occur with regard to campus collaboration and building-wide issues.</li> <li>▪ If proposing a full school take-over approach, the applicant outlines a realistic transition plan focused on communicating with existing staff.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.6 HIGH SCHOOL GRADUATION AND POSTSECONDARY READINESS – IF APPLICABLE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant provides a plan for meeting the Tennessee graduation requirements (including credits, transcripts, electives, and GPA calculation) and a compelling explanation of any additional requirements beyond the State's requirements.</li> <li>▪ The applicant clearly and persuasively explains how the school's graduation requirements will ensure student readiness for college or other postsecondary opportunities.</li> <li>▪ The applicant outlines effective systems and structures to address students at risk of dropping out or not meeting graduation requirements.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.7 ASSESSMENTS</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Internal assessments will provide rich data for evaluation of the academic program and align with state standards.</li> <li>▪ A process for collecting, analyzing and using data to support instruction is clearly articulated, with detailed plans presented to provide adequate training for teachers and school leaders.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.8 SCHOOL CALENDAR AND SCHEDULE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The school calendar (<b>Attachment A</b>) and student schedules meet Tennessee minimum requirements of the equivalent of 180 days of instruction.</li> <li>▪ The applicant explains how the calendar and schedule will be optimal for student learning under its academic plan.</li> <li>▪ Tiered interventions, tutoring, enrichment and extra-curricular activities are built into the school schedule. Any proposal for Saturday School, summer school, or after school programing is reasonable.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.9 SPECIAL POPULATIONS AND AT-RISK STUDENTS</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The leadership team has strong experience working with special populations.</li> <li>▪ The applicant describes a realistic plan for hiring qualified personnel and adapting the school schedule to address the needs of special populations.</li> <li>▪ There is a clear process for identifying students with disabilities, English Learners, at-risk students, and gifted students.</li> <li>▪ The applicant outlines a viable plan for providing special populations with instructional programs, practices, and strategies that ensure access to the general education curriculum and academic success.</li> <li>▪ The applicant has well-defined plans for monitoring and evaluating progress and exiting students.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.10 SCHOOL CULTURE AND DISCIPLINE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant outlines a clear vision for school culture or ethos that will promote a positive academic environment and will reflect high levels of academic expectation and support.</li> <li>▪ The applicant provides a coherent plan for creating and sustaining the intended culture for all students, teachers, administrators, and parents, and for integrating new students and families as they arrive.</li> <li>▪ The Student Handbook (<b>Attachment B</b>) includes relevant, comprehensive, and legally sound policies.</li> <li>▪ The student discipline policy (<b>Attachment C</b>) provides effective and legally sound procedures to support a safe, orderly school climate and strong school culture while respecting student rights.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.11 RECRUITMENT AND ENROLLMENT</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant's enrollment policy (<b>Attachment D</b>) complies with state law and district policies.</li> <li>▪ The applicant outlines a compelling community outreach plan that is likely to foster demand and community support.</li> <li>▪ Applicant's student recruitment and marketing plan, timeline, and enrollment policy will provide equal access to all interested students and families, including those in poverty, academically low-achieving students, students with disabilities, and English Learners.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.12 Parent and COMMUNITY ENGAGEMENT AND SUPPORT</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ There is evidence that community feedback is incorporated in the application.</li> <li>▪ There are 3 or more letters of support, MOUs, or contracts with community partners (<b>Attachment E</b>).</li> <li>▪ The applicant outlines a sound and compelling plan for engaging parents and community partners prior to the school's opening and throughout the life of the school.</li> <li>▪ The applicant has a well-defined plan for informing and educating parents on school policies.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

**SUMMARY COMMENTS**

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply copied from your subsection analysis.

<b>Summary Rating for Entire Academic Plan Design and Capacity</b>		
<b>Initial Application Review</b>		
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<p>Strengths:</p>        <p>Weaknesses/Questions:</p>		
<b>Final Application Review</b>		
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<p>Strengths:</p>        <p>(If Any) Weaknesses:</p>		

**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.1 GOVERNANCE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The proposed board structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and financials.</li> <li>▪ The proposed board members offer a wide range of knowledge and skills needed to oversee a successful charter school, including but not limited to educational, financial, legal, and community expertise.</li> <li>▪ The applicant provides for initial and ongoing board training as required by law.</li> <li>▪ There is a clear, fair, and transparent process for hearing and handling complaints.</li> <li>▪ Governance documents (<b>Attachments F1-F7</b>) are complete and align with state laws and district policies.</li> </ul>		
<b>Initial Application Review</b>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.2 START-UP PLAN</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant provides a detailed and realistic timeline for starting the school that aligns with the start-up budget.</li> <li>▪ The applicant adequately addresses potential challenges.</li> <li>▪ For ASD operators only, the applicant provides a compelling and detailed School Exit Plan.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.3 FACILITIES</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Facility plans provide sufficient space for the educational program and anticipated student population and reasonably align with the budget.</li> <li>▪ The applicant demonstrates expertise in facilities acquisition and management, either internal or external.</li> <li>▪ The applicant outlines a sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for, a facility.</li> <li>▪ The applicant has identified a realistic facility contingency plan.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.4 PERSONNEL/ HUMAN CAPITAL</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The school's organizational chart (<b>Attachment G</b>) clearly delineates the roles and reporting structure of the Board, staff, any related bodies (such as advisory bodies or parent/educator councils), and any external organizations that will play a role in managing the school.</li> <li>▪ Recruitment and hiring strategy, criteria, timeline, and procedures are likely to result in a strong school leader and key staff. Identified leaders have the necessary qualifications, competencies, and capacity for their assigned roles. The individual responsible for academic programming has a strong track record of driving student achievement (<b>Attachment H</b>).</li> <li>▪ Recruiting and hiring practices are likely to result in a diverse leadership team and staff that reflect the student body and community.</li> <li>▪ Compensation packages are likely to attract and retain qualified staff.</li> <li>▪ The applicant provides a detailed plan for supporting, developing, and annually evaluating school leadership and teachers that aligns with statewide evaluation requirements.</li> <li>▪ The applicant has a plan for addressing unsatisfactory leadership/teacher performance and turnover.</li> <li>▪ The employee manual and personnel policies (<b>Attachment I</b>) are complete and effective.</li> <li>▪ Staffing projections for each year are robust, aligned with the educational program and conducive to the school's success.</li> </ul>		
<b>Initial Application Review</b>		
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<b>Final Application Review</b>		
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<b>Concerns/ Questions</b>		<b>Page</b>

**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.5 PROFESSIONAL DEVELOPMENT</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Professional development opportunities and scheduling effectively support the education program and are likely to maximize success in improving student achievement.</li> <li>▪ The applicant proposes a thoughtful plan for professional development to address special and diverse populations.</li> <li>▪ The professional development plan supports professional growth, generates collaboration, and cultivates future leadership.</li> </ul>		
<b>Initial Application Review</b>		
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<b>Concerns/ Questions</b>		<b>Page</b>

**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.6 INSURANCE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant plans to secure comprehensive and adequate insurance coverage for the charter school, including workers' compensation, employer liability, property, professional liability, surety bonds, sexual abuse and any other required coverage.</li> <li>▪ The insurance company letter (<b>Attachment J</b>) confirms that required coverage will be provided upon approval of the charter school application.</li> </ul>		
<b>Initial Application Review</b>		
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<b>Concerns/ Questions</b>		<b>Page</b>

**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.7 TRANSPORTATION – IF APPLICABLE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant's transportation plan includes anticipated routes, extracurricular activities, and Saturday school, where applicable.</li> <li>▪ The applicant has a sound plan for oversight of its transportation operations.</li> <li>▪ The applicant has a plan for transporting special needs students where necessary.</li> <li>▪ The applicant demonstrates familiarity with state and federal regulations relating to provision of transportation services to students.</li> </ul>		
<b>Initial Application Review</b>		
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<b>Concerns/ Questions</b>		<b>Page</b>



**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.8 FOOD SERVICE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant provides a clear description of how the school will offer food service to all students, adhering to state and federal regulations and nutritional guidelines.</li> <li>▪ The applicant explains how it will collect free and reduced-price lunch information from families.</li> </ul>		
<b>Initial Application Review</b>		
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<b>Concerns/ Questions</b>		<b>Page</b>

**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.9 ADDITIONAL OPERATIONS</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant provides a detailed plan for using technology within the classroom and for state assessments.</li> <li>▪ The applicant provides a compelling data management plan that protects the privacy of student information.</li> <li>▪ The applicant demonstrates an understanding of health and safety requirements that includes a plan for hiring a registered nurse.</li> <li>▪ The applicant outlines detailed safety and security plans for students, staff, guests, and property.</li> <li>▪ The applicant specifies a maintenance plan for school facilities.</li> <li>▪ For ASD operators only, the applicant provides a sound rationale for any additional operational changes that are identified.</li> </ul>		
<b>Initial Application Review</b>		
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<b>Concerns/ Questions</b>		<b>Page</b>

**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.10 CHARTER MANAGEMENT ORGANIZATION – IF APPLICABLE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• If the school plans to contract with a CMO, the applicant describes the service provider's educational and management success and the rationale and process for selecting the CMO.</li> <li>• There is a clear division of roles between the board and the CMO.</li> <li>• There is a viable plan for identifying and managing potential conflicts of interest with the CMO, and any existing or potential conflicts of interest are disclosed and explained.</li> <li>• If available, the CMO agreement (<b>Attachment K</b>) clearly articulates the proposed key terms, including roles and responsibilities of the school governing board, the school staff, and the service provider; the services and resources to be provided; performance-evaluation measures and mechanisms; detailed explanation of compensation to be paid to the provider; financial controls and oversight; investment disclosure; methods of contract oversight and enforcement; and conditions for contract renewal and termination</li> </ul>		
<b>Initial Application Review</b>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

2.11 WAIVERS		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Each requested waiver includes a compelling and thoughtful rationale describing how the waiver will increase student achievement.</li> <li>▪ The applicant does not seek a waiver of any rules or statutes that cannot be waived under Tennessee law.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.12 NETWORK VISION, GROWTH PLAN, &amp; CAPACITY</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant provides a detailed strategic vision for the network that includes a robust five-year network growth plan. The growth plan includes the following: proposed years of opening; number and types of schools; a clear, detailed outline of any pending applications (whether in the same LEA, Tennessee or another state); all current and/or targeted markets/communities and criteria for selecting them; and projected enrollments.</li> <li>▪ There is strong, compelling evidence of organizational capacity to open and operate high quality schools in Tennessee and elsewhere, including specific timelines for building organizational capacity.</li> <li>▪ The applicant clearly describes results of past replication efforts, including how the network has addressed challenges.</li> <li>▪ There is a realistic presentation of anticipated challenges and risks over the next five years associated with opening additional schools, along with a plan to overcome them to achieve the organization’s stated outcomes.</li> <li>▪ The applicant provides a comprehensive annual report for the network (<b>Attachment L</b>).</li> </ul>		
<b>Initial Application Review</b>		
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<b>Concerns/ Questions</b>		<b>Page</b>

**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.13 NETWORK MANAGEMENT</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The leadership team is identified, together with their roles and responsibilities.</li> <li>▪ As <b>Attachment M</b>, organizational charts for Year 1, Year 3, and Year 5 clearly delineate roles and responsibilities of the governing board, including lines of authority between the board, school leadership, and staff. If applicable, the chart includes other related bodies (advisory bodies or parent-teacher councils) and a charter management organization.</li> <li>▪ The applicant identifies any shared or centralized support services to be provided by the network, along with their costs and methods of allocation across the network.</li> <li>▪ The applicant clearly identifies in the table the allocation of decision-making responsibilities between the school and network.</li> </ul>		
<b>Initial Application Review</b>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.14 NETWORK GOVERNANCE</b>		
Characteristics of a strong response: <ol style="list-style-type: none"> <li><b>1) If there is a network board that operates as the main governing body with each school having an advisory committee:</b> <ul style="list-style-type: none"> <li>▪ Applicant provides a complete description of the governance structure at the network level and delineates how that relates to each individual school within the network.</li> <li>▪ Applicant provides a robust plan for ensuring there is adequate local/Tennessee stakeholder representation.</li> <li>▪ Roles and responsibilities of this board are described clearly and concisely.</li> <li>▪ Applicant describes the current size and composition of the governing board, with a rationale of how the current/proposed governance structure and composition will ensure the desired outcomes of a network of highly effective schools.</li> <li>▪ There is a clear and compelling plan to evaluate academic and operational success, including the evaluation of the school and school leader(s).</li> </ul> </li> <li><b>2) If there will be one governing board for all schools at the local level:</b> <ul style="list-style-type: none"> <li>▪ Applicant provides a clear, detailed description of the governance structure at the network level and how it relates to the individual school, including any changes that will take place at the board level for it to be effective (if necessary).</li> <li>▪ A copy of the by-laws and organizational chart is included.</li> <li>▪ There is a clear, thorough plan to transform the board's membership, mission and by-laws to support the expansion plan. The plan should include a timeline for the transition and orientation of the board to its new responsibilities.</li> <li>▪ There is a plan in place for board training as required by Tennessee law.</li> </ul> </li> </ol>		
<b>Initial Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.15 PERSONNEL/HUMAN CAPITAL – NETWORK-WIDE STAFFING PROJECTIONS</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Network staffing projections for each year are robust and aligned with the educational program and are conducive to the school's success.</li> </ul>		
<b>Initial Application Review</b>		
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## SECTION 2 OPERATIONS PLAN AND CAPACITY

### SUMMARY COMMENTS

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply copied from your subsection analysis.

<b>Summary Rating for Entire Operations Plan and Capacity</b>		
<b>Initial Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<p>Strengths:</p>          <p>Weaknesses/Questions:</p>		
<b>Final Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<p>Strengths:</p>          <p>(If Any) Weaknesses:</p>		

**SECTION 3 – FINANCIAL PLAN AND CAPACITY**

<b>3.1 &amp; 3.2 CHARTER SCHOOL FINANCING</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The budget worksheet (<b>Attachment N</b>) contains reasonable assumptions and budget numbers that reflect all start-up expenses.</li> <li>• The applicant identifies financial procedures, policies, systems and processes for accounting, payroll, and independent annual audits.</li> <li>• Sound criteria and procedures are in place for selecting contractors for any administrative services.</li> <li>• There is a high level of financial expertise amongst the applicant’s internal and external team members.</li> <li>• The start-up and five-year operating budgets are complete, realistic and viable.</li> <li>• The applicant’s budget narrative (<b>Attachment O</b>) clearly explains and supports all revenue and cost assumptions.</li> <li>• The applicant articulates a sound contingency plan to meet financial needs if anticipated revenues are lower than estimated.</li> </ul>		
<b>Initial Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<b>Strengths</b>		<b>Page</b>
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<b>Final Application Review</b>		
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**SECTION 3 – FINANCIAL PLAN AND CAPACITY**

<b>3.3 NETWORK FINANCIAL PLAN</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The applicant provides a detailed description of the fiscal health of other schools in the network, including a comprehensive description of any schools on fiscal probation or in bankruptcy.</li> <li>▪ The applicant provides a complete, realistic, and viable budget for the network (<b>Attachment P</b>). The budget includes reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions, identification of the amounts and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated) and including evidence of firm commitments where applicable.</li> <li>▪ The applicant articulates a sound contingency plan to meet financial needs if anticipated revenues are lower than estimated.</li> </ul>		
<b>Initial Application Review</b>		
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**SECTION 3 FINANCIAL PLAN AND CAPACITY**

**SUMMARY COMMENTS**

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply copied from your subsection analysis.

<b>Summary Rating for Entire Financial Plan and Capacity Section</b>		
<b>Initial Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<p>Strengths:</p>          <p>Weaknesses/Questions:</p>		
<b>Final Application Review</b>		
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<p>Strengths:</p>          <p>(If Any) Weaknesses:</p>		

**SECTION 4 –PORTFOLIO REVIEW/PERFORMANCE RECORD**

<b>4.1 PAST PERFORMANCE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Applicant provides clear, compelling evidence of raising student achievement levels at each school in the network and evidence that the operator's schools are high performing and successful (<b>Attachment Q</b>).</li> <li>▪ Graduation rates are indicative of highly successful strategies (if applicable).</li> <li>▪ Applicant selects one or more of the organization's consistently high-performing schools and provides a detailed narrative outlining primary causation of high-quality, high-performing status, along with a description of challenges met and overcome.</li> <li>▪ Applicant selects one or more of the organization's low or unsatisfactorily performing schools and provides a detailed narrative outlining primary causation of low performing school(s) in the network and specific strategies outlined that corrected, or will correct, the deficiencies (if applicable).</li> <li>▪ If the school is operating under another authorizer, the school's performance report or authorizer evaluation (<b>Attachment R</b>) is favorable.</li> <li>▪ Latest audit (<b>Attachment S</b>) shows no findings and is prepared in accordance with generally accepted accounting and auditing principles as outlined in Tennessee law.</li> <li>▪ The organization is in good standing wherever its schools are located, and there have been no revocations, litigation that has resulted in negative outcomes, non-renewals, or financial, organizational, or academic deficiencies (if applicable, <b>Attachment T</b>).</li> </ul>		
<b>Application Review</b>		
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