



**Charter School Authorizer Evaluations
Evaluator Additional Guidance
2021**

NOTE: Unless stated otherwise, documentation should fall between September 1, 2019 and August 31, 2021

Standard 1a - Planning and Commitment to Excellence Sub-standards	
i. Supports and advances the purposes of charter school law.	<ul style="list-style-type: none"> ● Potential Evidence: new school application, intervention policy/procedure, renewal policy/procedure, revocation policy/procedure ● Addresses: “Supports”: The authorizer’s evidence addresses the charter school law directly or via their authorized charter schools. T.C.A. 49-13-102: <ul style="list-style-type: none"> ○ 1) Improve learning for all students and close the achievement gap between high and low students; ○ 2) Provide options for parents to meet educational needs of students; ○ 3) Encourage the use of different and innovative teaching methods, and provide greater decision-making authority to schools and teachers in exchange for greater responsibility for student performance; ○ 4) Measure performance of pupils and faculty, and ensure that children have the opportunity to reach proficiency on state academic assessments; ○ 5) Create new professional opportunities for teachers; and ○ 6) Afford parents substantial meaningful opportunities to participate in the education of their children. ● Satisfies: <ul style="list-style-type: none"> ○ “Advancing” purposes: ex: communicating a new school application process. ○ Not “advancing” purposes: ex: not approving new application, not offering expansion to high performing schools
ii. Ensures that the authorizer’s local board of education or authorizing board, leadership, and staff understand and are committed to the quality charter authorizing principles and standards and developing as authorizing professionals.	<ul style="list-style-type: none"> ● Potential Evidence: training and/or professional development for authorizing team and local board; board updates on school performance reports in alignment with authorizing principles; local board signs off on evaluation self-assessment and/or annual report submissions. ● Addresses: evidence shows an attempt to inform the <u>entire</u> board, leadership, and staff. ● Satisfies: <ul style="list-style-type: none"> ○ Authorizer ensures the entire board, leadership, and staff: <ul style="list-style-type: none"> ■ understand and are committed to quality charter authorizing principles and standards. ■ are developing professionally. Ex: onboarding for new board, leadership, and staff; referencing principles and standards in all presentations and reports; authorizing professional development attended at least annually
iii. Defines external relationships and lines of authority to protect its authorizing functions from conflicts of interest and political influence.	<ul style="list-style-type: none"> ● Potential Evidence: Conflict of Interest policy/procedure, signed statements, and organizational chart. ● Addresses: evidence shows an attempt to address conflicts of interest. ● Satisfies: <ul style="list-style-type: none"> ○ Conflict of interest policy/procedure must specifically address authorizing. Signed conflict of interest statements, rather than a policy/procedure, are acceptable. ○ Conflict of interest statements must include all members of authorizing office (those with primary responsibility and any personnel fully or partially funded by the authorizer fee) and local board of education. Evidence needs to be inclusive of the authorizer’s entire board membership and all authorizing staff.

	<ul style="list-style-type: none"> ○ The organizational chart must depict how the organization is structured. It outlines the roles, responsibilities, and relationships among individuals within the organization. An organizational chart can be used to depict the structure of an organization as a whole or broken down by department or unit. The organizational chart must include all the authorizer’s employees assigned with authorizing responsibilities, and the authorizer’s Board Members. ○ “Conflict of Interest” (COI) as defined by T.C.A. §§ 12-4-101 and 12-4-102 ○ COI Definitions: <ul style="list-style-type: none"> ■ It is unlawful for any officer, committee member, director, or other person whose duty it is to vote for, let out, overlook, or in any manner to superintend any work or any contract in which any municipal corporation, county, state, development district, utility district, human resource agency, or other political subdivision created by statute shall or may be interested, to be directly interested in any such contract. “Directly interested” means any contract with the official personally or with any business in which the official is the sole proprietor, a partner, or the person having the controlling interest. ■ It is unlawful for any officer, committee member, director, or other person whose duty it is to vote for, let out, overlook, or in any manner to superintend any work or any contract in which any municipal corporation, county, state, development district, utility district, human resource agency, or other political subdivision created by statute shall or may be interested, to be indirectly interested in any such contract unless the officer publicly acknowledges such officer's interest. “Indirectly interested” means any contract in which the officer is interested but not directly so, but includes contracts where the officer is directly interested but is the sole supplier of goods or services in a municipality or county.
<p>iv. Implements policies, processes, and practices that streamline and systematize its work toward stated goals, and executes its duties efficiently while minimizing administrative burdens on schools.</p>	<ul style="list-style-type: none"> ● Potential Evidence: Authorizing policies and procedures and evidence that supports implementation of policies and procedures (must have stated goals with some, even loose, connection to the policies and practices). ● Addresses: evidence shows the authorizer has implemented policies, processes, and practice ● Satisfies: <ul style="list-style-type: none"> ○ Stated goals should have some connection, even if loose, to the policies and practices. ○ Administrative burden: ex: narrative mentions how a policy/procedure was changed from A to B, the reviewed policy/procedure reflects the change describes.
<p>v. Evaluates its work regularly against national and state standards for quality authorizing and recognized effective practices, and develops and implements timely plans for improvement when necessary.</p>	<ul style="list-style-type: none"> ● Potential Evidence: Self-assessment and/or third-party evaluation of the organization’s authorizing. ● Addresses: evidence shows the authorizer has conducted an evaluation in between September 1, 2019 and August 31, 2021. ● Satisfies: <ul style="list-style-type: none"> ○ Completes self-assessment in Non-Evaluation year in accordance with State Board Rule 0520-14-01-.08. ○ Optional evidence: Collects feedback from schools to inform self-evaluation. ○ To meet the threshold for 4 points, an authorizer must include evidence of implemented practices demonstrating how they are meeting their plans for improvement, as identified in the annual self-assessment.
<p>vi. States a clear mission for quality authorizing.</p>	<ul style="list-style-type: none"> ● Potential Evidence: Mission statement ● Addresses: authorizer evidence includes a mission.

	<ul style="list-style-type: none"> ● Satisfies: <ul style="list-style-type: none"> ○ Mission is not required to include the term “authorizing”, but must clearly be focused on authorizing. Mission may be for district and/or charter office. Documents using terminology such as “school choice” and/or “all schools” are sufficient.
<p>vii. Makes authorizing decisions that will result in positive student outcomes, in accordance with state law.</p>	<ul style="list-style-type: none"> ● <i>If any authorizer did not have any new start, revocation, or renewal decisions in the past two years, this sub-standard is marked N/A.</i> ● Potential Evidence: New start application, revocation, and/or renewal decisions ● Addresses: authorizer evidence includes authorizer decisions ● Satisfies: decisions are based on evidence that there is/is not a strong likelihood for student success or continued student success

Standard 1b – Human Resources

Sub-standards

<p>i. Through intra- or inter-agency collaborations, contractual relationships and/or staff, enlists expertise and competent leadership for all areas essential to charter school oversight—including, but not limited to, education leadership; instruction; assessment; local community needs; special education, English learners, and other diverse learning needs; performance management and accountability; law; finance; facilities; and nonprofit governance and management.</p>	<ul style="list-style-type: none">● Potential Evidence: Annual Authorizer Fee Report and/or job descriptions for all personnel fully or partially funded by the authorizer fee.● Addresses: authorizer evidence shows staff experience in all categories:<ul style="list-style-type: none">○ education leadership;○ instruction; assessment;○ local community needs;○ special education,○ English learners, and other diverse learning needs;○ performance management and accountability;○ law;○ finance;○ facilities; and○ nonprofit governance and management● Satisfies:<ul style="list-style-type: none">○ Evidence shows that staff members have expertise in <i>all</i> areas listed in substandard (i.), demonstrating academic, financial, and organizational expertise.○ Teacher, school leader, and school administrator experience equates to Instruction, and Education Leadership. Explicit experience must be documented for special education and EL.○ “Competent” means past experience (professional development in the area is not sufficient)
<p>ii. Employs competent personnel at a staffing level appropriate and sufficient to carry out all authorizing responsibilities in accordance with national and state standards, and commensurate with the scale of the charter school portfolio.</p>	<ul style="list-style-type: none">● <i>School leader Interview: probe if there are specific responsibilities that an authorizer never does versus things that an authorizer always does.</i>● Potential Evidence: Current resumes and job descriptions for all personnel fully or partially funded by the authorizer fee. Resumes must clearly reflect authorizing work. Submits authorizer fee report and narrative.● Addresses: authorizer evidence includes a listing of personnel● Satisfies:<ul style="list-style-type: none">○ Standards = NACSA and SBE Quality Authorizing Standards○ “Competent” means past experience (professional development in the area is not sufficient)○ Staffing is considered against the <i>most current</i> org chart.○ Narrative explains how staffing is appropriate and sufficient to cover all responsibilities in accordance with these standards.○ Professional development may broaden experience, but should not be used as the sole piece of evidence to demonstrate experience.

iii. Demonstrates an on-going commitment to developing and retaining authorizing staff members and provides regular professional development for the agency's leadership and local board of education or authorizing board to achieve and maintain high standards of professional authorizing practice and to enable continual agency improvement.

- **Potential Evidence:** Documentation from professional development/training/conferences within 2 years preceding evaluation. (This applies to all authorizing staff; "regular" is discretionary but must be within the past two years--this could be once, annually, more frequent, etc.)
- **Addresses:** authorizer evidence includes professional development for every listed of personnel
- **Satisfies:**
 - Evidence may include agendas from trainings, attendance sheets, or a training presentation.
 - Staffing is considered against the *most current* org chart.
 - "Developing" staff should include onboarding

Standard 1c - Financial resources

Sub-standards

<p>i. Determines the financial needs of the authorizing office and devotes financial resources to fulfill its authorizing responsibilities in accordance with national and state standards, commensurate with the scale of the charter school portfolio, and in accordance with Tennessee statute, including all relevant requirements for use of the authorizer fee.</p>	<ul style="list-style-type: none">● Potential Evidence: Annual Authorizer Fee Report, authorizing office operating budget.● Addresses: Authorizer evidence include financial information● Satisfies:<ul style="list-style-type: none">○ Annual Authorizer Fee Report includes clear descriptions for use of funds demonstrating adequate resources allocated to supporting authorizing work.○ This substandard may also be assessed through other parts of the rubric by considering the adequacy of resources.○ State Board rule: “The annual authorizer fee shall be the lesser of three percent (3%) of the annual per-student state and local allocations or \$35,000 per school.”○ “Commensurate” The financial needs are proportionate to the size of the portfolio. E.g., An authorizer with one charter school. It would not be proportionate for them to have a staff of 6 full-time people to perform authorizing duties for their one school.○ Authorizing budget affirms all revenue and expenses are related to authorizing.
<p>ii. Structures its funding in a manner that avoids conflicts of interest, inducements, incentives, or disincentives that might compromise its judgment in charter approval and accountability decision making.</p>	<ul style="list-style-type: none">● “Conflict of Interest” (COI) as defined by T.C.A. §§ <u>12-4-101</u> and <u>12-4-102</u>● Potential Evidence: This substandard may be assessed through all documentation submitted as part of the evaluation, with consideration of any potential conflicts of interest.● Addresses: Authorizer evidence include financial information● Satisfies:<ul style="list-style-type: none">○ When evidence reveals a COI has been addressed at some point during the review year, then note: “According to the <u>(document)</u>, the sponsor addressed a COI in the (sponsor’s Board Membership) in <u>(date)</u>. There is no evidence of an unaddressed conflict of interest.”○ If no evidence reveals a COI, note: “There is no evidence of an unaddressed conflict of interest.”○ COI Definitions:<ul style="list-style-type: none">▪ It is unlawful for any officer, committee member, director, or other person whose duty it is to vote for, let out, overlook, or in any manner to superintend any work or any contract in which any municipal corporation, county, state, development district, utility district, human resource agency, or other political subdivision created by statute shall or may be interested, to be directly interested in any such contract. “Directly interested” means any contract with the official personally or with any business in which the official is the sole proprietor, a partner, or the person having the controlling interest.▪ It is unlawful for any officer, committee member, director, or other person whose duty it is to vote for, let out, overlook, or in any manner to superintend any work or any contract in which any municipal corporation, county, state, development district, utility district, human resource agency, or other political subdivision created by statute shall or may be interested, to be indirectly interested in any such contract unless the officer

	publicly acknowledges such officer's interest. "Indirectly interested" means any contract in which the officer is interested but not directly so, but includes contracts where the officer is directly interested but is the sole supplier of goods or services in a municipality or county.
iii. Deploys funds effectively, transparently, and efficiently with the public and student interests in mind.	<ul style="list-style-type: none"> ● Potential Evidence: Annual Authorizer Fee Report ● Addresses: Authorizer evidence include financial information ● Satisfies: <ul style="list-style-type: none"> ○ "Effectively" – uses all authorizing fee funds to cover obligation costs (Okay to send excess back to schools) ○ "Transparently" – publishes annual authorizer fee report via website and shares report directly with authorized charter schools; returns funds to schools, if available (a website screenshot may show proof of sharing with ALL schools. An email may as well) ○ "Efficiently" – has a clear process for spending described in narrative
iv. Annually reports the authorizing obligations fulfilled using the authorizer fee in accordance with state law.	<ul style="list-style-type: none"> ● Potential Evidence: Annual Authorizer Fee Report ● Addresses: Authorizer evidence include financial information ● Satisfies: <ul style="list-style-type: none"> ○ "Obligations" as defined by State Board rule 0520-14-01-.05 and T.C.A. § 49-13-128(f) <ul style="list-style-type: none"> ▪ "The annual authorizer fee shall be the lesser of three percent (3%) of the annual per-student state and local allocations or \$35,000 per school." ▪ Uses: a) Charter school application approval process, b) Interim review process, c) Charter school renewal process, d) Monitoring and oversight activities, e) Personnel costs, f) Annual reporting, and g) Ongoing charter school support services ▪ "If, for any school year, the total amount of authorizer fees collected by the LEA exceeds the amount used by the LEA to perform its authorizing obligations and responsibilities, the LEA shall distribute the amount remaining to its authorized public charter schools." ... "in the fiscal year immediately following the fiscal year in which the excess fees were collected."

Standard 2a - Application Proposal Information, Questions, and Guidance

Sub-standards

<p>i. Issues a charter application information packet or request for proposals (RFP) that:</p> <ul style="list-style-type: none"> a) States any chartering priorities the authorizer may have established; b) Articulates comprehensive application questions to elicit the information needed for rigorous evaluation of applicants’ plans and capacities; and c) Provides clear guidance and requirements regarding application content and format, while explaining evaluation criteria. 	<ul style="list-style-type: none"> ● <i>Authorizers not eligible to review applications in the year under review = N/A. Insert evaluative comment, “The authorizer was not eligible to review applications during SY2019-20 or SY2020-21.”</i> ● Potential Evidence: TDOE new start application and rubric. (Authorizer requirements in addition to TDOE application are OK). Documentation provides applicants with a defined timeline that includes a planning stage of at least nine months for new schools and replicators as well as requirements for the submission of the application. School evidence is to be provided from selected schools identified in Appendix B. ● Addresses: Authorizer evidence includes an application ● Satisfies: <ul style="list-style-type: none"> ○ The application requires: <ul style="list-style-type: none"> ■ Operator’s academic data ■ Charter authorizer compliance reports ■ Financial records ■ Recent audit reports ■ For replicators: a business or growth plan and market research ■ Capacity Interview ○ Any additional local requirements are shared with applicants in advance and are not used as the sole reason for denial
<p>i. Welcomes proposals from first-time charter applicants as well as existing school operators/replicators, while appropriately distinguishing between the two kinds of applicants in proposal requirements and evaluation criteria.</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application ● Satisfies: <ul style="list-style-type: none"> ○ The application open first-time charter applicants as well as existing school operators/replicators. ○ The application’s proposal requirements and evaluation criteria distinguish between first-time charter applicants as well as existing school operators/replicators.
<p>ii. Encourages expansion of charter schools that demonstrate academic success, financial viability, organizational health, and capacity for growth.</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE amendment application and rubric ● Addresses: Authorizer evidence includes an application ● Satisfies: <ul style="list-style-type: none"> ○ The application includes expansion to charter schools that demonstrate: <ul style="list-style-type: none"> ■ academic success, ■ financial viability, ■ organizational health, and ■ capacity for growth. ○ Evidence shows clear authorizer communication with schools regarding amendment process, criteria for expansion. (this could be included with the app, on their website, or some other way of communicating.)

	<ul style="list-style-type: none"> ● Satisfies: if all the addressed components are present, then this substandard is rated 4
iii. Encourages replication of charter schools that demonstrate academic success, financial viability, organizational health, and capacity for growth.	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric (these may be one or multiple docs) ● Addresses: Authorizer evidence includes an application ● Satisfies: <ul style="list-style-type: none"> ○ Does the application include replication of charter schools that demonstrates: <ul style="list-style-type: none"> ■ academic success, ■ financial viability, ■ organizational health, and ■ capacity for growth? ○ Is there evidence of clear authorizer communication with schools regarding amendment process, criteria for replication. (this could be included with the app, on their website, or some other way of communicating.)
iv. Considers diverse educational philosophies and approaches.	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric (these may be one or multiple docs) ● Addresses: Authorizer evidence includes an application that is open to all. ● Satisfies: if all the addressed components are present, then this substandard is rated 4
v. Requires applicants to demonstrate capacity to serve students with diverse needs, such as students with disabilities or learning exceptionalities and English learners.	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric (these may be one or multiple docs) ● Addresses: Authorizer evidence includes an application. ● Satisfies: The application requires applicants to demonstrate capacity to serve students with diverse needs.

Standard 2b - Fair, Transparent, Quality-Focused Procedures.

Sub-standards

<p>i. Implements a charter application process that is open, well-publicized, and transparent, and is organized around clear, realistic timelines.</p>	<ul style="list-style-type: none"> ● <i>If appendix B or the narrative note that the authorizer did not review applications in the year/s under review, then this sub-standard is N/A. Insert evaluative comment, "The authorizer did not review any applications during SY2019-20 and 2020-21."</i> ● Potential evidence: TDOE new start application and rubric, screenshot of website, or other public communication of process ● Addresses: Authorizer evidence includes an application. ● Satisfies: The application: <ul style="list-style-type: none"> ○ is open to all interested applicants without limitation; ○ posted on website, accessible; ○ expectations and process outlined in advance; ○ timelines shared with applicants, and followed by the authorizer. (any cycle that began and ended between September 1, 2019 and August 31, 2021)
<p>ii. Allows sufficient time for each stage of the application and school pre-opening process to be carried out with quality and integrity.</p>	<ul style="list-style-type: none"> ● Potential Evidence: Application requirements ● Addresses: Authorizer evidence includes an application. ● Satisfies: Application follows a February 1 application deadline and all other application timelines in alignment with TDOE guidance and statute?
<p>iii. Explains how each stage of the application process is conducted and evaluated.</p>	<ul style="list-style-type: none"> ● Potential Evidence: New start application requirements and/or approval/denial communications ● Addresses: Authorizer evidence includes an application. ● Satisfies: Application explains how each stage of the application process is conducted and evaluated.
<p>iv. Communicates the education needs of the district, the charter authorizing processes, approval criteria, and decisions clearly to the public.</p>	<ul style="list-style-type: none"> ● Potential Evidence: New start application requirements and/or approval/denial communications ● All four of pieces must be "public" to receive credit, (either posted on the website or (ex) noted in via board meeting (minutes)) ● Addresses: Authorizer evidence includes an application. ● Satisfies: <ul style="list-style-type: none"> ○ The application (or materials) include: <ul style="list-style-type: none"> ■ the education needs of the district, ■ the charter authorization processes, ■ approval criteria ○ authorizer application decisions are shared publicly
<p>v. Informs applicants of their rights and responsibilities and promptly notifies applicants of approval or denial, while explaining the factors that determined the decision so that applicants can decide if they wish</p>	<ul style="list-style-type: none"> ● Potential Evidence: New start application requirements and/or approval/denial communications within 10 days of a decision ● Addresses: Authorizer evidence includes an application. ● Satisfies: Authorizer application process:

to revise their plans based in part on that information and resubmit in the future.

- inform applicants of their rights and responsibilities,
- promptly notifies applicants of approval or denial, and
- explain the factors that determined the decision?

Standard 2c - Rigorous Approval Criteria

Sub-standards

<p>i. Requires 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.</p>	<ul style="list-style-type: none">● Potential Evidence: TDOE new start application and rubric, training materials for review committee members including norming, review of high-quality applications, and capacity interview notes/process.● Addresses: Authorizer evidence includes an application.● Satisfies:<ul style="list-style-type: none">○ Authorizers consider evidence-based explanations within the application and capacity interview.○ Authorizers not eligible to review applications in the year under review = N/A. Insert evaluative comment, “The authorizer was not eligible to review applications during SY2019-20 or SY2020-21.”
<p>ii. Establishes distinct requirements and criteria for applicants who are existing school operators or replicators.</p>	<ul style="list-style-type: none">● Potential Evidence: TDOE new start application and rubric● Addresses: Authorizer evidence includes an application.● Satisfies: Application includes requirements and criteria for existing school operators or replicators beyond questions that are included for all applicants
<p>iii. Establishes distinct requirements and criteria for applicants proposing to contract with educational service providers (ESPs), including charter management organizations.</p>	<ul style="list-style-type: none">● Potential Evidence: TDOE new start application and rubric● Addresses: Authorizer evidence includes an application.● Satisfies: Application includes requirements and criteria for applicants proposing to contract with ESPs beyond questions that are included for all applicants

Standard 2d - Rigorous Decision Making

Sub-standards

<p>i. Grants charters only to applicants that have demonstrated competence and capacity to succeed in all aspects of their particular charter school model, consistent with the stated approval criteria.</p>	<ul style="list-style-type: none"> ● <i>If appendix B or the narrative note that the authorizer did not review applications in the year/s under review, then only evaluate the established policy/procedure and/or intent to use the rubric.</i> ● <i>If authorizer has not reviewed an application within the last two years, the standard will only evaluate the established policy/procedure and/or intent to use the rubric.</i> ● Potential Evidence: TDOE new start application and rubric, established policy/procedure on approval criteria based on rubric, if available, board meeting minutes for application decisions (if reviewed within the last two years), and any additional documentation beyond the application and rubric that is considered when making decision. ● Addresses: Authorizer evidence includes completed application reviews. ● Satisfies: <ul style="list-style-type: none"> ○ Review of implementation will consider both the evaluation recommendation and the board’s decision to approve or deny the application. ○ Evidence demonstrates the authorizer focused on competence and capacity of applicant team.
<p>ii. Rigorously evaluates each application through thorough review of the written proposal, a substantive in-person interview with each qualified applicant, and all appropriate due diligence to examine the applicant’s experience and capacity, conducted by knowledgeable and competent evaluators.</p>	<ul style="list-style-type: none"> ● <i>Please note: (ii) considers the process used to evaluate, (iii) considers the application review team.</i> ● <i>If appendix B or the narrative note that the authorizer did not review applications in the year/s under review, then only evaluate the established policy/procedure and/or intent to use the rubric.</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. TDOE new start application and rubric, evaluation team with expertise in charter schools, academics, operations and/or finance, evaluation process documents which include steps and timeline. ● Addresses: Authorizer evidence includes completed application reviews that consider: <ul style="list-style-type: none"> ○ written proposals, ○ in-person interview for each qualified applicant, ○ due diligence that examines: <ul style="list-style-type: none"> ○ experience and ○ capacity ● Satisfies: Evaluation cites evidence from the proposal, interview, and due diligence collected.
<p>iii. Engages, for both written application reviews and applicant interviews, highly competent teams of internal and external evaluators with relevant educational, organizational (governance and management), financial, and legal expertise, as well as thorough understanding of the essential principles of charter school autonomy and accountability.</p>	<ul style="list-style-type: none"> ● <i>Please note: (ii) considers the process used to evaluate, (iii) considers the application review team.</i> ● <i>If appendix B or the narrative note that the authorizer did not review applications in the year/s under review, then only evaluate the established policy/procedure and/or intent to use the rubric.</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Evaluation summary with names and qualifications of internal and external evaluators. ● Addresses: Authorizer evidence includes application review processes with: <ul style="list-style-type: none"> ○ internal and external evaluators with relevant expertise in: <ul style="list-style-type: none"> ■ educational,

	<ul style="list-style-type: none"> ■ organizational (governance and management), ■ financial, and ■ legal ○ Evaluators have a thorough understanding of the essential principles of charter school autonomy and accountability. ● Satisfies: Evidence of evaluation team with knowledge and experience within proposed academic focus experience (ex: personalized learning) and/or provides actionable feedback to applicants.
<p>iv. Provides orientation or training to application evaluators (including interviewers) to ensure consistent evaluation standards and practices, the elimination of real or perceived conflicts of interest, the observance of essential protocols, and the fair, unbiased treatment of all applicants.</p>	<ul style="list-style-type: none"> ● <i>If appendix B or the narrative note that the authorizer did not review applications in the year/s under review, then only evaluate the established policy/procedure and/or intent to use the rubric.</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. TDOE new start application and rubric, training materials for review committee members including norming and review of high-quality applications. (no need to verify that every reviewer was trained). ● Addresses: Authorizer evidence includes application evaluator orientation or training. ● Satisfies: <ul style="list-style-type: none"> ○ Application evaluator orientation or training addresses: <ul style="list-style-type: none"> ■ consistent evaluation standards and practices, ■ the elimination of real or perceived conflicts of interest, ■ the observance of essential protocols and ■ the fair, unbiased treatment of all applicants? ○ Evidence demonstrates the authorizer approves applications that have detailed plans for opening and evidence of fiscal viability
<p>v. Ensures that the application-review process and decision making are free of conflicts of interest, and requires full disclosure of any potential or perceived conflicts of interest between reviewers or decision makers and applicants.</p>	<ul style="list-style-type: none"> ● <i>If appendix B or the narrative note that the authorizer did not review applications in the year/s under review, then only evaluate the established policy/procedure and/or intent to use the rubric.</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Signed Conflict of Interest form from each evaluator participating in last two years of application review. ● Addresses: Authorizer evidence includes COI forms for all evaluators ● Satisfies: <ul style="list-style-type: none"> ○ Application reviews are free of COIs, ○ Authorizer requires full disclosure of any potential or perceived conflicts of interest between reviewers or decision makers and applicants.
<p>vi. Approves applications that are comprised of a detailed plan for charter school opening, operation, and fiscal stability, with little substantive work left for later development.</p>	<ul style="list-style-type: none"> ● <i>If appendix B or the narrative note that the authorizer did not review applications in the year/s under review, then only evaluate the established policy/procedure and/or intent to use the rubric.</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Board meeting minutes for application decisions, application review rubric scores. ● Addresses: Authorizer evidence includes approved applications with plans ● Satisfies: Approved applications

- include a detailed plan for:
 - charter school opening,
 - operation, and
 - fiscal stability
- leave little substantive work left for later development.

Standard 2e - Elements for Existing School Operators or Replicators.

Sub-standards

<p>i. Provide clear evidence of their capacity to operate new schools successfully while maintaining quality in existing schools;</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application that require evidence of capacity. ● Satisfies: if all the addressed components are present, then this substandard is rated 4
<p>ii. Document their educational, organizational, and financial performance records based on all existing schools;</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application require records of performance from all schools for: <ul style="list-style-type: none"> ○ educational, ○ organizational, and ○ financial. ● Satisfies: if all the addressed components are present, then this substandard is rated 4
<p>iii. Explain any never-opened, terminated, or non-renewed schools (including terminated or non-renewed third-party contracts to operate schools);</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application that require explanations of schools that were: <ul style="list-style-type: none"> ○ never-opened, ○ terminated, or ○ non-renewed. ● Satisfies: if all the addressed components are present, then this substandard is rated 4
<p>iv. Present their growth plan, business plan, and most recent financial audits;</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application that requires: <ul style="list-style-type: none"> ○ growth plan, ○ business plan, and ○ most recent financial audits. ● Satisfies: if all the addressed components are present, then this substandard is rated 4
<p>v. Meet high standards of academic, organizational, and financial success to earn approval for replication; and</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application that considers previous performance for: <ul style="list-style-type: none"> ○ academic, ○ organizational, and ○ financial ● Satisfies: includes evidence that application has met the “high standards” of the rubric
<p>vi. Document any current or past litigation and the resolution of such litigation.</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application that requires documentation of: <ul style="list-style-type: none"> ○ current litigation, ○ past litigation, and ○ resolution of litigation. ● Satisfies: if all the addressed components are present, then this substandard is rated 4

Standard 2f - Elements for Applicants Proposing to Contract with Educational Service Providers, including Charter Management Organizations (if applicable).

Sub-standards

<p>i. Evidence of the service provider’s educational and management success;</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application that require evidence of successful performance in: <ul style="list-style-type: none"> ○ academics, ○ financial, and ○ organizational ● Satisfies: the authorizer has defined a minimally acceptable standard for academic, financial, and organizational performance.
<p>ii. A description of the process for selecting the ESP;</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application that require a description of the process for selecting the ESP. ● Satisfies: if all the addressed components are present, then this substandard is rated 4
<p>iii. A draft (or existing) service/management contract that sets forth 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; and</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application that require a description of the process for selecting the ESP. Key terms including: <ul style="list-style-type: none"> ○ A draft (or existing) service/management contract? with: <ul style="list-style-type: none"> ■ roles and responsibilities of: <ul style="list-style-type: none"> ● 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. ● Satisfies: if all the addressed components are present, then this substandard is rated 4
<p>iv. Disclosure and explanation of any existing or potential conflicts of interest between the school governing board and proposed service provider or any affiliated business entities.</p>	<ul style="list-style-type: none"> ● Potential Evidence: TDOE new start application and rubric ● Addresses: Authorizer evidence includes an application that requires: <ul style="list-style-type: none"> ○ COI disclosures, and ○ explanation of any COIs ○ COI disclosures from all school governing board members, and ○ proposed service provider or affiliated business entities ● Satisfies: if all the addressed components are present, then this substandard is rated 4

Standard 3a - Charter Agreement Term, Negotiation, and Execution

Sub-standards

<p>i. Executes a charter agreement with a legally incorporated governing board independent of the authorizer.</p>	<ul style="list-style-type: none"> • <i>This substandard considers the terms of the agreement. Signatures are considered in substandard 3aiv.</i> • Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement names governing board and school district within terms for randomly selected charter schools. <i>This standard specifically considers the charter agreement. Additional referenced docs may be considered, but the basis for this rating lies with the charter agreement.</i> • Addresses: Authorizer evidence includes a charter agreement. • Satisfies: Agreement is between named governing board and authorizer
<p>ii. Grants charter agreements for an initial term of ten operating years with a high-stakes review every five years, in addition to annual performance reports.</p>	<ul style="list-style-type: none"> • Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement • Addresses: Authorizer evidence includes a charter agreement. • Satisfies: <ul style="list-style-type: none"> ○ Interim Review is conducted for any school who is over five years into charter term that defines likelihood of renewal. ○ Produces annual performance reports for schools that defines likelihood of renewal.
<p>iii. Defines material and non-material terms of the charter agreement.</p>	<ul style="list-style-type: none"> • Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement in compliance with State Board rule 0520-14-01-.06 • Addresses: Authorizer evidence includes a charter agreement. • Satisfies: At a minimum, contracts must include these material terms regarding the charter school’s governance, financial, operational, or academic structure. This can include, but not limited to, change in governance structure or addition of/changes to CMO, addition or removal of grade level(s), change in student enrollment outside of thresholds set in agreement, addition or removal of transportation, change to location, change to academic focus, changes identified in agreement as material, as outlined in SBE rule.
<p>iv. Ensures mutual understanding and acceptance of the terms of the charter agreement by the school’s governing board.</p>	<ul style="list-style-type: none"> • Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and school district. • Addresses: Authorizer evidence includes a charter agreement. • Satisfies: Signatures are sufficient, no need to verify “mutual understanding”
<p>v. Allows—and requires charter agreement amendments for—occasional material changes to a school’s plans, but does not require amending the charter agreement for non-material modifications.</p>	<ul style="list-style-type: none"> • Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. TDOE amendment application and rubric and charter agreement. • Addresses: Authorizer evidence includes a charter agreement. • Satisfies: <ul style="list-style-type: none"> ○ Communicate a clearly defined amendment process with timeline and expectations for approval in compliance with State Board rule 0520-14-01-.06 with its charter schools. ○ Contracts require amendments for material terms.

Standard 3b - Rights and Responsibilities.

Sub-standards

<p>i. Executes charter agreements that clearly:</p> <ul style="list-style-type: none">a. State the rights and responsibilities of the school and the authorizer;b. State and respect the autonomies to which schools are entitled—based on statute, waiver, or authorizer policy—including those relating to the school’s authority over educational programming, staffing, budgeting, and scheduling;c. Define performance standards, criteria, and conditions for renewal, intervention, revocation, and non-renewal, while establishing the consequences for meeting or not meeting standards or conditions;d. State the statutory, regulatory, and procedural terms and conditions for the school’s operation;e. State reasonable pre-opening requirements or conditions for new schools to ensure that they meet all health, safety, and other legal requirements prior to opening and are prepared to open smoothly;f. State the responsibility and commitment of the school to adhere to essential public-education obligations, including admitting and serving all eligible students so long as space is available, and not expelling or counseling out students except pursuant to a legal discipline policy approved by the authorizer; andg. State the responsibilities of the school and the authorizer in the event of school closures.	<ul style="list-style-type: none">● <i>This standard specifically considers the charter agreement. Additional referenced docs may be considered, but the basis for this rating lies with the charter agreement.</i>● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and school district.● Addresses: Authorizer evidence includes a charter agreement.● Satisfies: Closure – evidence must explicitly show roles of both the school and authorizer for credit
<p>ii. Ensures that any fee-based services that the authorizer provides are set forth in a services agreement that respects charter school autonomy and treats the charter school equitably compared to district schools, if applicable; and ensures that purchasing such services is explicitly not a condition of charter approval, continuation, or renewal.</p>	<ul style="list-style-type: none">● <i>In accordance with T.C.A. § 49-13-136, a public charter school may contract with the LEA or any third party for the provision of goods and services necessary to use the property or facility or to make the property or facility useful.</i>● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and school district; fee-based service agreements between charter school and authorizer.● Addresses: Authorizer evidence includes a charter agreement with mention of fee-based services.● Satisfies: Agreement includes terms for establishing fee-based services with the authorizer that:<ul style="list-style-type: none">○ Respect charter autonomy○ Treats the charter equitably compared to other district schools, is applicable.○ States purchasing services is not a condition of charter approval, continuation, or renewal

Standard 3c – Performance Standards

Sub-standards

<p>i. Executes charter agreements that plainly:</p> <ul style="list-style-type: none">a. Establish the performance standards under which schools will be evaluated, using objective and verifiable measures of student achievement as the primary measure of school quality, in accordance with state law;b. Define clear, measurable, and attainable academic, financial, and organizational performance standards and targets that the school must meet as a condition of renewal, including but not limited to state and federal measures; (See Paragraph ii., Performance standards detailed information.)c. Include expectations for appropriate access, education, support services, and outcomes for students with disabilities;d. Define the sources of academic data that will form the evidence base for ongoing and renewal evaluation, including state-mandated and other standardized assessments, student academic growth measures, internal assessments, qualitative reviews, and performance comparisons with other public schools in the district and state;e. Define the sources of financial data that will form the evidence base for ongoing and renewal evaluation, grounded in professional standards for sound financial operations and sustainability;f. Define the sources of organizational data that will form the evidence base for ongoing and renewal evaluation, focusing on fulfillment of legal obligations, fiduciary duties, and sound public stewardship; andg. Include clear, measurable performance standards to judge the effectiveness of alternative model schools, as defined by state law—requiring and appropriately weighting rigorous mission-specific performance measures and metrics that credibly demonstrate each school’s success in fulfilling its mission and serving its special population.	<ul style="list-style-type: none">● <i>This standard specifically considers the charter agreement. Additional referenced docs may be considered, but the basis for this rating lies with the charter agreement.</i>● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and school district.● Addresses: Authorizer evidence includes a charter agreement.● Satisfies:<ul style="list-style-type: none">○ Performance framework aligns with requirements in T.C.A. § 49-13-143 which require authorizers to use a performance framework for all schools or to adopt a performance framework aligned to the Tennessee Department of Education’s model framework.○ The agreement must have goals / expected outcomes for students with disabilities.○ Data sources must be defined for each: state-mandated and other standardized assessments, student academic growth measures, internal assessments, qualitative reviews, and performance comparisons with other public schools in the district and state.○ “Alternative” means a school for students suspended or expelled from the regular school program
<p>ii. Sets detailed performance standards. Performance standards enable schools and authorizers to know the outcomes for which authorizers will hold schools accountable. They are the basis for school evaluation and should be incorporated in the charter agreement, commonly as an attachment. Academic, financial, and organizational performance standards should include clearly defined and measurable indicators, measures, metrics, and targets that:</p> <ul style="list-style-type: none">a) Academic Performance	<ul style="list-style-type: none">● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and school district.● Addresses: Authorizer evidence includes a charter agreement with mention of performance standards● Satisfies:<ul style="list-style-type: none">○ Performance framework aligns with requirements in T.C.A. § 49-13-143○ All 12 of the performance indicators to the left must be included for full credit.

<ol style="list-style-type: none"> 1. Set expectations for student academic achievement status or proficiency, including comparative proficiency; 2. Set expectations for student academic growth, including adequacy of growth toward state standards; 3. Incorporate state and federal accountability systems, including state grading and/or rating systems; 4. Set expectations for postsecondary readiness, including graduation rates (for high schools); and 5. Provide schools an option to incorporate mission-specific performance measures for which the school has presented valid, reliable, and rigorous means of assessment approved by the authorizer. <p>b) Financial Performance</p> <ol style="list-style-type: none"> 1. Enable the authorizer to monitor and evaluate the school’s financial stability and viability based on short-term performance; and 2. Enable the authorizer to monitor and evaluate the school’s long-term financial sustainability. <p>c) Organizational Performance</p> <ol style="list-style-type: none"> 1. Define the essential elements of the educational program for which the authorizer will hold the school accountable; 2. Define financial management and oversight standards based on generally accepted accounting principles; 3. Hold school governing boards accountable for meeting statutory and board-established operating and reporting requirements; 4. Ensure school compliance with student and employee rights and obligations; and 5. Establish expectations related to the school environment, including health and safety, transportation, facilities, and appropriate handling of records. 	<ul style="list-style-type: none"> ○ #a5 – this only needs to be offered as an option, it may be demonstrated in policy/procedure (contracting, general...) ○ #c1 – “essential elements of the educational program” are school-specific characteristics of the educational program e.g., project-based learning.
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Standard 3d - Provisions for Educational Service Provider (ESP) Contracts (if applicable).

Sub-standards

- i. Includes, for any school that contracts with an ESP provider for the management of its educational program, finances, or school operations, contractual provisions that:¹
 - a. Clearly establish the primacy of the charter agreement over the ESP contract;
 - b. Clearly identify the school governing board as the party ultimately responsible for the success or failure of the school, and clearly define the ESP as a vendor of services;
 - c. Prohibit the ESP from selecting, approving, employing, compensating, or serving as school governing board members;
 - d. Provide for sufficient transparency around the spending of public monies; and
 - e. Require all instructional materials, furnishings, and equipment purchased or developed with public funds to be the property of the school, not the ESP, in compliance with state law.

- **Potential Evidence:** School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and school district with additional provisions.
- **Addresses:** Authorizer evidence includes a charter agreement with mention of ESP provisions, if applicable. This standard is marked as N/A if the charter does not contract with an ESP provider.
- **Satisfies:** a-e are all satisfied

¹ The standard does not apply to contracts with ESPs that do not have substantial responsibility for education, operational, and financial operations such as for payroll, textbooks, curriculum, etc.

Standard 3e - ESP Contracts Additional Provisions (if applicable).

Sub-standards

- i. Contracts between the ESP and the school governing board should articulate:
 - a. The roles and responsibilities of the school governing board and the ESP, including all services to be provided under the contract;
 - b. The performance measures, consequences, and mechanisms by which the school governing board will hold the ESP accountable for performance, aligned with the performance measures in the charter agreement;
 - c. All compensation to be paid to the ESP including all fees, bonuses, and what such compensation includes or requires;
 - d. Terms of any facility agreement that may be part of the relationship;
 - e. Financial reporting requirements and provisions for the school governing board's financial oversight;
 - f. All other financial terms of the contract, including disclosure and documentation of all loans or investments by the ESP to the school, and provision for the disposition of assets in accordance with law;
 - g. Assurances that the school governing board, at all times, maintains independent fiduciary oversight and authority over the school budget and ultimate responsibility for the school's performance;
 - h. Provisions for contract termination; and
 - i. Respective responsibilities of the governing board and ESP in the event of school closure, including transparency in the school's revenues and expenditures, as well as those managed by the ESP.

- **Potential Evidence:** School evidence is to be provided from selected schools identified in Appendix B. Contract signed by governing board and ESP.
- **Addresses:** Authorizer evidence includes an ESP agreement, if applicable. This standard is marked as N/A if the charter does not contract with an ESP provider.
- **Satisfies:** a-i are all satisfied

Standard 4a - Performance Evaluation and Compliance Monitoring

Sub-standards

<p>i. Implements a comprehensive performance accountability and compliance monitoring system that is defined by the charter agreement and provides the information necessary to make rigorous and standards-based renewal, revocation, and intervention decisions.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement and any performance accountability, intervention, and oversight and monitoring systems referenced in charter agreement. ● Addresses: Authorizer evidence includes a means of collecting compliance information. ● Satisfies: Systems must include information about renewal, revocation, and intervention decisions
<p>ii. Defines and communicates to schools the process, methods, and timing of gathering and reporting school performance and compliance data.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Performance accountability, intervention, and oversight and monitoring processes. ● Addresses: Authorizer evidence includes a means of collecting school performance information. ● Satisfies: Evidence of actively communicating to charter schools the process, method, and timing of gather and reporting of school performance data and compliance data.
<p>iii. Implements an accountability system that effectively streamlines federal, state, and local performance expectations and compliance requirements while protecting schools’ legally entitled autonomy and minimizing schools’ administrative and reporting burdens.</p>	<ul style="list-style-type: none"> ● Potential Evidence: Performance accountability, intervention, and oversight and monitoring process. ● Addresses: Authorizer evidence includes a means of collecting school performance information. ● Satisfies: <ul style="list-style-type: none"> ○ Evidence of federal, state and local performance expectations and compliance requirements ○ Documentation does not create administrative and reporting burdens on school; is requested in advance of deadline with reasonable amount of time to comply
<p>iv. Provides clear technical guidance to schools as needed to ensure timely compliance with applicable rules and regulations.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Email/other communication to charter schools after legislative sessions, local board meetings, State Board meetings, etc., providing information about applicable rules and regulations. ● Addresses: Authorizer evidence includes guidance to schools. ● Satisfies: <ul style="list-style-type: none"> ○ Evidence could include slide decks/emails to charter schools with the professional development/training opportunities open to them. ○ Evidence does not include sign-in sheets. ○ “As needed” is only tied to affirmative evidence of a need. If there is no evidence of a need, then no evidence is needed here. ○ Technical guidance: The provision of targeted and customized guidance from professionals with subject matter expertise relevant to the issue at hand and aimed to direct the school toward successfully fulfilling its obligations under applicable rules, laws, and the terms of agreement. E.g., Guidance regarding compliance changes in charter school law.
<p>v. Visits each school as appropriate and necessary for collecting data that cannot be obtained otherwise and in accordance with the contract, while ensuring that the frequency, purposes, and methods of such</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Site visit protocol. ● Addresses: Authorizer evidence includes a school visit information (established or implemented). ● Satisfies:

visits respect school autonomy, minimize administrative burdens, and avoid operational interference.	<ul style="list-style-type: none"> ○ Protocol has been communicated to schools in advance of the school year and communicates the frequency purposes and methods of school visits. ○ School leader Interview: probe how the authorizer conducts site visits to determine if it is aligned to the protocol. ○ A minimum of one annual site visit per year is required—two visits during the review period. ○ Ignore "for collecting data that cannot be obtained otherwise"
vi. Evaluates each school annually on its performance and progress toward meeting the standards and targets stated in the charter agreement, including essential compliance requirements, and clearly communicates evaluation results to the school’s governing board and leadership.	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Annual Report ● Addresses: Authorizer evidence includes some form of school annual reporting. ● Satisfies: Evidence of sharing to either board or leadership credit is sufficient
Requires and reviews annual financial audits of schools, conducted by a qualified independent auditor.	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Stated expectation requiring audits and documentation showing audit review. ● Addresses: Authorizer evidence includes some form of school annual reporting, could come in the form of a meeting note. ● Satisfies: <ul style="list-style-type: none"> ○ Collects audits in alignment with T.C.A. § 49-13-127 ○ Accurately analyzes financial audits against performance framework.
vii. Communicates regularly with schools as needed, including both the school leaders and governing boards, and provides timely notice of contract violations or performance deficiencies.	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Intervention protocol. ● Addresses: Authorizer evidence includes communications to the school/s, could include authorizer communication in the form of newsletters or mailing lists ● Satisfies: <ul style="list-style-type: none"> ○ Protocol is communicated to schools annually. ○ “Regular” is not defined, consider whether a newsletter or something like it has a cadence
viii. Provides an annual written report to each school, summarizing its performance and compliance to date and identifying areas of strength and areas needing improvement.	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Annual Report. ● Addresses: Authorizer evidence includes some form of school annual reporting. two are needed: SY2018-19 and SY2019-20 ● Satisfies: <ul style="list-style-type: none"> ○ Annual active communication to schools regarding the publication of the annual written report required by T.C.A. § 49-13-120. ○ Authorizers may have more extensive annual written reports that are also actively communicated to schools.
ix. Articulates and enforces stated consequences for failing to meet performance expectations or compliance requirements.	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Any written communication regarding failing to meet performance expectations or compliance requirements. ● Addresses: Authorizer evidence includes some communications to the school/s, may be for any school in their portfolio. ● Satisfies:

- Stated consequences must be established/articulated, regardless of whether there is evidence of a need to enforce them.
- **School Leader Interview:** probe to see if any school leaders received communication regarding performance expectations or compliance requirements.

Standard 4b - Respecting School Autonomy

Sub-standards

<p>i. Respects the school’s authority over its day-to-day operations.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. practice to convene school leaders for feedback, survey feedback, intervention protocol, calendar of collections, narrative. ● Addresses: Consider the collective documentation and the school leader interview for this standard. In reviewing all evidence, look for any evidence that the authorizer has compromised (or deliberately respected) the authority of a school. ● Satisfies: Start from the perspective that autonomy has been respected by the authorizer. <ul style="list-style-type: none"> ○ School leader Interview: probe if there are things that an authorizer never does versus things that an authorizer always does.
<p>ii. Collects information from the school in a manner that minimizes administrative burdens on the school, while ensuring that performance and compliance information is collected with sufficient detail and timeliness to protect student and public interests.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. process for collecting performance and compliance information. ● Addresses: Consider the collective documentation and the school leader interview for this standard. ● Satisfies: <ul style="list-style-type: none"> ○ School leader Interview: probe if there are things that an authorizer never does versus things that an authorizer always does.
<p>iii. Periodically reviews compliance requirements and evaluates the potential to increase school autonomy based on flexibility in the law, streamlining requirements, demonstrated school performance, or other considerations.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. self-evaluation ● Addresses: Authorizer evidence includes authorizer review of practices ● Satisfies: Start from the perspective that autonomy has been respected by the authorizer. <ul style="list-style-type: none"> ○ School leader Interview: probe if there are things that an authorizer never does versus things that an authorizer always does.
<p>iv. Refrains from directing or participating in educational decisions or choices that are appropriately within a school’s purview under the charter law or contract.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. feedback reports, intervention actions. ● Addresses: Consider the collective documentation and the school leader interview for this standard. In reviewing all evidence, look for any evidence that the authorizer has inserted themselves into school educational decisions or choices. ● Satisfies: Start from the perspective that school autonomy has been respected by the authorizer. <ul style="list-style-type: none"> ○ School leader Interview: probe if there are things that an authorizer never does versus things that an authorizer always does.

Standard 4c – Protecting student rights

Sub-standards

<p>i. Ensures that schools admit students through a random selection process that is open to all students, is publicly verifiable, and does not establish undue barriers to application (such as mandatory information meetings, mandated volunteer service, or parent contracts) that exclude students as provided by federal, state, and local law.</p>	<ul style="list-style-type: none"> ● <i>This considers the process a school uses, not their outcome (or non-compliance)</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and authorizer. ● Addresses: <ul style="list-style-type: none"> ○ Authorizer evidence includes an agreement that addresses student enrollment processes. ○ Site visits protocols and reports may contain evidence of the authorizer’s expectations and/or review or school documentation; additionally, intervention letters may show evidence of the authorizer addressing non-compliance with these expectations. ● Satisfies: “Ensures” – a school/s could earn bad ratings for enrollment or discipline in reports, this standard considers whether the authorizer’s oversight occurs.
<p>ii. Ensures that schools provide equitable access and inclusive services to all students as required by applicable federal and state law, including, but not limited to, students with disabilities, English learners, homeless students, students in foster care, migrant students, and gifted students.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and authorizer. ● Addresses: <ul style="list-style-type: none"> ○ Authorizer evidence includes an agreement that addresses student enrollment processes. ○ Site visits protocols and reports may contain evidence of the authorizer’s expectations and/or review or school documentation; additionally, intervention letters may show evidence of the authorizer addressing non-compliance with these expectations. ● Satisfies: “Ensures” – a school/s could earn bad ratings for enrollment or discipline in reports, this standard considers whether the authorizer’s oversight occurs
<p>iii. Ensures clarity in the roles and responsibilities of all parties involved in serving students with disabilities.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and authorizer. ● Addresses: <ul style="list-style-type: none"> ○ Authorizer evidence includes an agreement that addresses student enrollment processes. ○ Site visits protocols and reports may contain evidence of the authorizer’s expectations and/or review or school documentation; additionally, intervention letters may show evidence of the authorizer addressing non-compliance with these expectations. ● Satisfies: <ul style="list-style-type: none"> ○ “Ensures” – a school/s could earn bad ratings for enrollment or discipline in reports, this standard considers whether the authorizer’s oversight occurs. ● At a minimum, the authorizer has a process to ensure schools have defined roles for those serving students with disabilities.
<p>iv. Ensures that schools’ student discipline policies and actions are legal, fair, and equitable and that no student is suspended, expelled, or</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Charter agreement signed by governing board and authorizer.

counseled out of a school outside of that process, and that schools have a clear process for addressing parent/ community grievances.

- **Addresses:**
 - Authorizer evidence includes an agreement that addresses student enrollment processes.
 - Site visits protocols and reports may contain evidence of the authorizer’s expectations and/or review or school documentation; additionally, intervention letters may show evidence of the authorizer addressing non-compliance with these expectations.
- **Satisfies:** “Ensures” – a school/s could earn bad ratings for enrollment or discipline in reports, this standard considers whether the authorizer’s oversight occurs.

Standard 4d – School intervention

Sub-standards

<p>i. Establishes and clearly communicates to schools at the outset an intervention and problem-solving policy that states the general conditions that may trigger intervention and the types of actions and consequences that may ensue.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Intervention protocol. ● Addresses: Authorizer evidence includes documentation addressing issue resolution. ● Satisfies: Protocol is communicated to schools
<p>ii. Gives schools clear, adequate, evidence-based, and timely notice of contract violations or performance deficiencies.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Intervention protocol. ● Addresses: Authorizer evidence includes documentation addressing issue resolution. ● Satisfies: <ul style="list-style-type: none"> ○ Any intervention communication is documented, includes contract violations, provides for clear next steps and timelines for correcting the issue. ○ “Timely” may be apparent in an authorizer’s policy/procedure or within specific interventions; how “timely” is based on the context and reviewer’s professional judgement
<p>iii. Allows schools reasonable time and opportunity for remediation in non-emergency situations.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Intervention protocol. ● Addresses: Authorizer evidence includes documentation addressing issue resolution. ● Satisfies: <ul style="list-style-type: none"> ○ Any intervention communication is documented, includes charter agreement violations, and provides clear next steps and timelines for correcting the issue. ○ “Reasonable” may be apparent in an authorizer’s policy/procedure or within specific interventions; how “reasonable” is based on the context and reviewer’s professional judgement
<p>iv. Applies professional discretion when intervention is needed and considers context and a range of effective solutions.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Intervention protocol. ● Addresses: Authorizer evidence includes documentation addressing issue resolution. ● Satisfies: The intervention protocol may define this or at least the protocol allows for that flexibility/discretion (i.e., not prescriptive)
<p>v. Where intervention is needed, engages in intervention strategies that clearly preserve school autonomy and responsibility (identifying what the school must remedy without prescribing solutions) while clearly stating possible consequences for noncompliance.</p>	<ul style="list-style-type: none"> ● Potential Evidence: School evidence is provided from selected schools identified in Appendix B. Intervention protocol. ● Addresses: Authorizer evidence includes documentation addressing issue resolution. ● Satisfies: <ul style="list-style-type: none"> ○ Authorizer evidence identifies issue without prescribing solutions, states consequences for noncompliance, includes appropriate amount of time to remedy issue. ○ “Appropriate” is based on the context and reviewer’s professional judgement

Standard 4e – Public Reporting

Sub-standards

- Produces an annual public report that provides clear, accurate performance data for the charter schools it oversees and reports on individual school and overall portfolio performance according to the framework set forth in the charter agreement in accordance with State law.
- **Potential Evidence:** School evidence is to be provided from selected schools identified in Appendix B. Annual Report as required under [T.C.A. § 49-13-120](#) and in TDOE [guidance](#).
- **Addresses:** Authorizer evidence includes annual reports--annual reports may take to form of individual school reports or one report with all schools in the authorizer’s portfolio
- **Satisfies:**
 - All annual reports for a charter school include performance data and are available publicly on the authorizer’s website.
 - Annual reports must be BOTH: for individual schools and an overall annual report of the authorizer’s portfolio.
 - Two annual reports are needed here, SY2018-19 and SY2019-20
 - To achieve “fully satisfies”, an annual report will reflect current (in-force) agreement framework and include every indicator.

Standard 5a – Revocation

Sub-standards

<p>i. Revokes a charter during the charter term if there is clear evidence of extreme underperformance or violation of law or the public trust that imperils students or public funds, in accordance with state law.</p>	<ul style="list-style-type: none">• <i>This standard:</i><ul style="list-style-type: none">○ <i>Considers any revocation brought forward by the authorizer regardless of whether the school’s charter was revoked (overturned by the state board).</i>○ <i>Is about process for all authorizers and about process and implementation for authorizers who have implemented a revocation process within the two-year review term.</i>○ <i>If appendix B or the narrative note that the authorizer did not revoke and schools in the year/s under review, then only evaluate the established policy/procedure and/or intent to use the rubric.</i>• Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Established revocation policy/procedure in accordance with TCA 49-13-122• Addresses: Authorizer evidence includes documentation regarding revocation processes.• Satisfies:<ul style="list-style-type: none">○ Revocation decisions are based on significant issues with clear evidence of non-remedy or an emergency that violates law or public trust.○ The evidence offered by the authorizer is to be considered, no need to evaluate whether there is a need for revocation.○ Revocation: Occurs within a contract term and in NOT non-renewal.○ Revocation is considered for the authorizing office as a whole and is NOT limited to the authorizing board or the authorizing staff—both the staff and board make up the “authorizer”.
<ul style="list-style-type: none">• Does not make revocation decisions on the basis of political or community pressure.	<ul style="list-style-type: none">• <i>This standard:</i><ul style="list-style-type: none">○ <i>Considers any revocation brought forward by the authorizer regardless of whether the school’s charter was revoked (overturned by the state board).</i>○ <i>Is about process for all authorizers and about process and implementation for authorizers who have implemented a revocation process within the two-year review term.</i>○ <i>If appendix B or the narrative note that the authorizer did not revoke and schools in the year/s under review, then only evaluate the established policy/procedure and/or intent to use the rubric.</i>• Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Board meeting minutes.• Addresses: Authorizer evidence includes documentation regarding revocation processes.• Satisfies:<ul style="list-style-type: none">○ Revocation reviews are free of COIs,○ Revocation decisions align with expectations and rely on evidence-based review. Decisions do not include evidence that decision was based on outside factors.

Standard 5b - Renewal Decisions Based on Merit and Inclusive Evidence

Sub-standards

<p>i. Bases the renewal process and renewal decisions on thorough analyses of a comprehensive body of objective evidence defined by the performance framework in the charter agreement.</p>	<ul style="list-style-type: none"> ● <i>If none of the authorizer’s schools went through renewal in SY2019-20 or SY 2020-21, then this standard is N/A. Insert evaluative comment, “The authorizer did not have any schools facing renewal during SY2019-20 or SY 2020-21.”</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Established renewal policy/procedure, communication with schools regarding criteria. ● Addresses: Authorizer evidence includes renewal policy/procedures. ● Satisfies: If renewal decisions have been made in the last two years, evidence that renewal decisions align renewal policy/procedure and with previous communications regarding renewal status to a charter school.
<p>ii. Grants renewal only to schools that have achieved the standards and targets stated in the charter agreement, are organizationally and fiscally viable, and have been faithful to the terms of the contract and applicable law.</p>	<ul style="list-style-type: none"> ● <i>If none of the authorizer’s schools went through renewal in SY2019-20 or SY 2020-21, then this standard is N/A. Insert evaluative comment, “The authorizer did not have any schools facing renewal during SY2019-20 or SY 2020-21.”</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. List of schools with renewal decisions in last two years, Letter of assurance that no schools were up for renewal, renewal decision communications. ● Addresses: Authorizer evidence includes renewal decisions. ● Satisfies: A threshold for renewal is required, but what the threshold for renewal is, is up to the authorizer
<p>iii. Does not make renewal decisions on the basis of political or community pressure or solely on promises of future improvement.</p>	<ul style="list-style-type: none"> ● <i>If no evidence shows pressure, use: “Documentation does not indicate the existence of political or community pressure in renewal decisions.”</i> ● <i>If none of the authorizer’s schools went through renewal in SY2019-20 or SY 2020-21, then this standard is N/A. Insert evaluative comment, “The authorizer did not have any schools facing renewal during SY2019-20 or SY 2020-21.”</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Board minutes ● Addresses: Authorizer evidence includes renewal decisions. ● Satisfies: <ul style="list-style-type: none"> ○ Renewal decisions are free of COIs, ○ Renewal decisions align with expectations and rely on evidence-based review. Decisions do not include evidence that decision was based on outside factors.

Standard 5c - Cumulative Report and Renewal Application

Sub-standards

<p>i. Provides to each school, in advance of the renewal decision, a cumulative performance report that:</p> <ul style="list-style-type: none">a. Summarizes the school’s performance record over the charter term; andb. States the authorizer’s summative findings concerning the school’s performance and its prospects for renewal.	<ul style="list-style-type: none">● <i>If not renewals in the review years, then this section is N/A. Insert evaluative comment, “The authorizer did not have renewals during SY2019-20 or SY2020-21.”</i>● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Cumulative performance report in accordance with T.C.A. § 49-13-121, Interim report● Addresses: Authorizer evidence includes a report or template that covers the contract term.● Satisfies: Cumulative performance report can align with annual report with all years of term included
<p>i. Requires any school seeking renewal to apply for it through a renewal application, which provides the school a meaningful opportunity and reasonable time to respond to the cumulative report; to correct the record, if needed; and to present additional evidence regarding its performance.</p>	<ul style="list-style-type: none">● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. TDOE renewal application in accordance with T.C.A. § 49-13-121● Addresses:<ul style="list-style-type: none">○ Authorizer evidence includes renewal application.○ Renewal timeline○ Authorizer evidence includes cumulative report.● Satisfies: If a renewal has occurred during the review cycle, evidence reflects a reliance on the school’s renewal application, cumulative report and the process has aligned with the renewal timeline.

Standard 5d - Fair, Transparent Process.

Sub-standards

<p>i. Clearly communicates to schools the criteria for charter revocation, renewal, and non-renewal decisions that are consistent with the charter agreement, including any policy changes thereto.</p>	<ul style="list-style-type: none"> ● <i>This substandard is evaluated for all authorizers.</i> ● <i>A revocation policy/procedure is required for all authorizers regardless of whether they have renewals within the scope of this evaluation.</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Renewal and revocation policies and/or procedural documents, including communication with schools regarding renewal timelines and prospects for renewal. and revocation policy/procedure and/or procedural documents. ● Addresses: Authorizer evidence includes revocation, renewal, and non-renewal policy/procedures. ● Satisfies: <ul style="list-style-type: none"> ○ “Clearly” means criteria is defined and repeated in all communication about revocation, renewal, and non-renewal decisions. ○ Charter schools can articulate criteria for revocation, renewal, and non-renewal decisions in School Leader Interview
<p>ii. Promptly notifies each school of its renewal (or, if applicable, revocation) decision, including written explanation of the reasons for the decision.</p>	<ul style="list-style-type: none"> ● <i>If none of the authorizer’s schools went through renewal in SY2019-20 or SY 2020-21, then this substandard is N/A. Insert evaluative comment, “The authorizer did not have any schools facing renewal during SY2019-20 or SY 2020-21.”</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Renewal and revocation decision communications. ● Addresses: Authorizer evidence includes dated renewal decisions. ● Satisfies: <ul style="list-style-type: none"> ○ In accordance with T.C.A. §§ 49-13-121 and 122 ○ Schools must be notified within 10 days.
<p>iii. Promptly communicates renewal or revocation decisions to the school community and public within a time frame that allows parents and students to exercise choices for the upcoming school year.</p>	<ul style="list-style-type: none"> ● <i>If none of the authorizer’s schools went through renewal in SY2019-20 or SY 2020-21, then this substandard is N/A. Insert evaluative comment, “The authorizer did not have any schools facing renewal during SY2019-20 or SY 2020-21.”</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Renewal and revocation decision communications. ● Addresses: Authorizer evidence includes dated renewal decisions. ● Satisfies: <ul style="list-style-type: none"> ○ “Promptly” meaning on or before January 15. ○ In accordance with T.C.A. § 49-13-121, renewal decisions are made by February 1st of the year the charter term expires. ○ Notification must occur publicly e.g., board meeting agendas, minutes, videos, etc.
<p>iv. Explains in writing any available rights of legal or administrative appeal through which a school may challenge the authorizer’s decision, including appeal to the Tennessee Public Charter School Commission.</p>	<ul style="list-style-type: none"> ● <i>If none of the authorizer’s schools went through renewal in SY2019-20 or SY 2020-21, then this substandard is N/A. Insert evaluative comment, “The authorizer did not have any schools facing renewal during SY2019-20 or SY 2020-21.”</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Renewal and revocation decision communications.

	<ul style="list-style-type: none"> ● Addresses: Authorizer evidence includes renewal decisions. ● Satisfies: materials clearly identify legal/administrative appeal rights
<p>v. Regularly updates and publishes the process for renewal decision making, including guidance regarding required content and format for renewal applications.</p>	<ul style="list-style-type: none"> ● <i>This substandard is evaluated for all authorizers.</i> ● Potential Evidence: School evidence is to be provided from selected schools identified in Appendix B. Renewal and revocation policies and/or procedural documents. ● Addresses: Authorizer evidence includes renewal decision policy/procedures. ● Satisfies: <ul style="list-style-type: none"> ○ Regularly could be annual or more frequent, as decided by authorizer. ○ Required content and format for renewal applications.

Standard 5e – Closure

Sub-standards

i. In the event of a school closure, oversees and works with the school governing board and leadership in carrying out a detailed closure protocol that ensures timely notification to parents; orderly transition of students and student records to new schools; and disposition of school funds, property, and assets in accordance with law.

- *This substandard is evaluated for all authorizers. If not closures, then only the closure expectations are considered. Closures may occur as a result of a revocation or voluntarily by the operator.*
- *If appendix B or the narrative note that the authorizer did not close any schools in the year/s under review, then only evaluate the established closure expectations.*
- **Potential Evidence:** School evidence is to be provided from selected schools identified in Appendix B. Closure protocol in accordance with T.C.A. § [49-13-130](#)
- **Addresses:** Authorizer evidence includes closure policy/procedures.
- **Satisfies:** Consider the established closure expectations and, if a closure has occurred within the last 2 years, whether the authorizer implemented the process was implemented consistent with the expectations.

Standard 6a - Advanced Standards (Bonus Category)

Sub-standards

<p>a. Ensures authorizing is visible, adequately resourced, and the people responsible for day-to-day authorizing functions have input over decision making.</p>	<ul style="list-style-type: none"> ● Potential Evidence: board meeting minutes, presentations ● Addresses: the authorizer has addressed the following sub-standards: <ul style="list-style-type: none"> ○ 1a.vi ○ 1c.i ○ 1a.vii ○ 2b.i ○ 2b.iv ○ 2d.i ○ 5a,ii ○ 5b.i ● Satisfies: the authorizer has earned a rating of 4 in <i>all</i> of following sub-standards: <ul style="list-style-type: none"> ○ 1a.vi ○ 1c.i ○ 1a.vii ○ 2b.i ○ 2b.iv ○ 2d.i ○ 5a,ii ○ 5b.i
<p>b. Articulates and implements an intentional strategic vision and plan for chartering, including clear priorities, goals, and time frames for achievement.</p>	<ul style="list-style-type: none"> ● Potential Evidence: ● Addresses: Authorizer evidence includes a strategic plan. ● Satisfies: <ul style="list-style-type: none"> ○ “Implements” means evidence that authorizer follows its vision and plan. ○ “Clear” means priorities, goals and time frames are defined, measurable, and timebound
<p>c. Evaluates its work regularly against its chartering mission and strategic plan goals, and implements plans for improvement when falling short of its mission and strategic plan.</p>	<ul style="list-style-type: none"> ● Potential Evidence: ● Addresses: Authorizer evidence includes authorizer evaluation. ● Satisfies: <ul style="list-style-type: none"> ○ Consideration includes mission and goals, ○ “Regularly” means at least annually
<p>d. Provides an annual public report on the authorizer’s program and performance in meeting its strategic plan goals.</p>	<ul style="list-style-type: none"> ● Potential Evidence: Screenshot of authorizer’s website where report is posted publicly. ● Addresses: Authorizer evidence includes annual report on authorizing. ● Satisfies: <ul style="list-style-type: none"> ○ Report is posted/shared publicly

<p>e. Broadly invites and solicits charter applications while publicizing the authorizer’s strategic vision and chartering priorities, without restricting or refusing to review applications that propose to fulfill other goals.</p>	<ul style="list-style-type: none"> ○ Includes progress against goals ● Potential Evidence: Screenshot of authorizer’s website communicating application process; evidence of communication shared with potential applicants; publicly posted newsletter/invite to accept applications ● Addresses: Authorizer evidence includes charter application. ● Satisfies: <ul style="list-style-type: none"> ○ “Broadly” means the authorizer is agnostic and does not limit their review of applications to specific type of school or composition of developers. ○ Application includes strategic vision and chartering priorities.
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