



DISTRICT OF COLUMBIA
PUBLIC CHARTER SCHOOL BOARD

2014 - 15 Application Guidelines for Experienced Operators

Application to Establish a Public Charter School in the District of Columbia

District of Columbia Public Charter School Board

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District of Columbia Public Charter School Board

PCSB's Mission

To provide quality public school options for DC students, families, and communities through:

- A comprehensive application review process;
- Effective oversight;
- Meaningful support; and
- Active engagement of its stakeholders.

PCSB's Vision

To lead the transformation of public education in DC and serve as a national role model for charter school authorization and accountability.

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District of Columbia Public Charter School Board Members

John H. “Skip” McKoy, Chair

John H. “Skip” McKoy is director of programmatic initiatives at Fight for Children, where he oversees the organization’s strategic focus on improving health and education outcomes for DC children ages 3 and 4, working closely with local community, business, education and government leaders. His background is in urban planning and community development. Earlier, he held executive positions at the Anacostia Waterfront Corporation, DC Agenda, Lockheed Martin and in DC government. He is the chair of the State Early Childhood Development Coordinating Council and an adviser to the DC Fiscal Policy Institute and the Community Partnership for the Prevention of Homelessness.

Darren Woodruff, Ph.D., Vice Chair

Darren Woodruff is a principal research analyst at the American Institutes for Research (AIR), where he works on issues related to improving schools, supporting at-risk youth and eliminating disproportionality in special education. Before joining AIR, he evaluated schools implementing the Comer School Development Program. He has also served as a teacher and counselor at the elementary, high school, and college levels. He received his Ph.D. in education psychology from Howard University. He has written and presented on culturally responsive instructional practices, co-written a chapter in the Harvard book *Racial Inequity in Special Education* and co-written “Using School Leadership Teams to Meet the Needs of English Language Learners.”

Sara Mead, Member

Sara Mead is a principal at Bellwether Education Partners, where she focuses on thought leadership and strategic advising. Her work on federal education policy, charter schools, preschool and gender in education has been featured in numerous media outlets, including *The Washington Post*, *The New York Times*, and *USA Today*, and she has appeared on CBS, ABC and National Public Radio. Before joining Bellwether, she directed the New America Foundation’s Early Education Initiative. She has also worked for Education Sector, the Progressive Policy Institute, and the U.S. Department of Education.

Barbara Nophlin, Member

Nophlin, an education consultant, has held senior leadership positions in DC public and public charter schools. She was the second head of school for Paul Public Charter School, the city’s only conversion charter school (formerly Paul JHS, a DCPS school.) She was the director of policy, research and analysis in the former State Education Office. She has also worked as a principal, assistant principal, early childhood coordinator, and instructional support specialist.

Don Soifer, Member

Don Soifer is a co-founder and executive vice president of the Lexington Institute, an Arlington, Va.-based nonpartisan think tank where he directs domestic policy research programs on education, energy and other topics. His education policy work, including research on higher education finance, special education and the achievement gap for English language learners, has been published in numerous media outlets, including *The Washington Post*, *The New York Times*, *USA Today*, and *New York Daily News*. He testified before Congress on his research and makes radio and television appearances on Fox News, Fox Business, and Wisconsin Public Radio. He serves on several advisory and governing boards for government and nonprofit organizations.

Herbert Tillery, Member

Tillery is co-chair of Raise DC and executive director of College Success Foundation - District of Columbia, a nonprofit that provides college scholarships and mentoring to low-income, underserved students. He was raised in Washington, DC and graduated from DCPS's Theodore Roosevelt High School. He served in the U.S. Army and retired at the rank of colonel. Previously he held senior executive leadership positions at the Department of Defense, DCPS, and The George Washington University. He previously served as DC Deputy Mayor for Operations.

Letter from the Board Chair

June 2014

Dear Prospective Applicant:

Thank you for your interest in applying to the District of Columbia Public Charter School Board to open a new charter school.

Our Experienced Operators Guidelines are designed to help expand access to high-quality school options for more students and families in Washington, DC. The guidelines are meant for operators with at least three years of high-quality outcomes as measured by state accountability systems or other externally validated assessments. We know that many experienced operators around the country are achieving impressive results through a diversity of education approaches, and our Board is committed to ensuring that District residents benefit from the most successful education options available.

These guidelines give a thorough overview of our rigorous application process, which is designed to approve the schools that have the most chance at success. Our board is committed to ensuring that the families in the District of Columbia have access to high-quality school options for our students and families.

We are committed to transforming public education in Washington, DC, and look forward to receiving your application.

Sincerely,



John H. "Skip" McKoy

Chairman

District of Columbia Public Charter School Board

Frequently Asked Questions

1. What is a charter school?

A charter school is a publicly funded school in the District of Columbia established pursuant to the District of Columbia School Reform Act of 1995, D.C. Code §§ 38-1802 *et seq.* (SRA). It is not a part of the District of Columbia Public Schools (DCPS). A public charter school exercises exclusive control over its expenditures, administration, personnel and instructional methods—and is, in most cases, exempt from rules and regulations that apply to DCPS.

2. What is the DC School Reform Act?

The DC School Reform Act (SRA) refers to D.C. Code §§ 38-1802 *et seq.*, which established public charter schools in DC. The full text of the SRA is available at <http://www.dcpsb.org/data/images/school%20reform%20act.pdf>.

3. How is a charter school funded?

Each charter school receives a per-pupil allocation based on a student's grade level, special education status and needs, and other factors. Funding is provided by the DC government directly to schools on a quarterly basis, beginning with a payment on July 15 and in accordance with the July 1–June 30 fiscal year.

4. Who has authority to grant charters in Washington, DC?

PCSB is the sole chartering authority in Washington, DC. It was created pursuant to the SRA, and its members are appointed by the mayor of the District of Columbia, with the advice and consent of the DC Council.

5. Who is eligible to establish a public charter school?

A person, a private, public, or quasi-public entity, or an institution of higher education that seeks to establish a public charter school in the District of Columbia (an “Eligible Applicant”) may submit a petition, i.e., an application, to establish a public charter school. D.C. Code § 38-1802(16).

6. Can an existing school propose to become a charter school?

Yes. An Eligible Applicant may submit an application¹ and propose to (1) convert an existing District of Columbia public school into a public charter school; (2) convert an existing private or independent school into a public charter school; or (3) establish a new public charter school. Conversion schools have additional application requirements that are found in D.C. Code § 38-1802.01.

7. What are the application requirements?

Eligible Applicants must complete and submit all information outlined these guidelines by 5 p.m. on September 8, 2014. For more details on the required information, see the sections “Submitting an Application” on page 15 and “Application Contents” on page 17.

8. When is the application deadline?

The application must be received by **5 p.m. Eastern Time on September 8, 2014.**

9. Can more than one application be submitted during a calendar year?

No. An Eligible Applicant may not file more than one Petition to establish a public charter school during a calendar year.

10. What are the requirements for applicants’ non-profit status?

A public charter school must be organized as a nonprofit corporation under the District of Columbia Nonprofit Corporation Act, Title 29, Chapter 4 of the D.C. Code, to be granted full approval; however, an application for a charter may be approved with conditions in cases where the process has begun but not been completed by the application submission date. In such instances, completion of the applicant’s incorporation is a condition precedent to receiving full approval of the application.

¹ In these guidelines, PCSB uses application and petition interchangeably. See D.C. Code § 38-1802(27).

Defined Terms

Board Member Agreement is a signed document that outlines the specific responsibilities of each member of the school's Board of Trustees, including a conflict of interest policy drafted by the applicant. Each school should use its own agreement template, which will be signed by each Board Member.

Charter Goals are related to a school's mission and may be categorized as academic, non-academic and organizational. **Academic Achievement Expectations** are student academic aims measured by assessments.

Charter Management Organization (CMO) is a nonprofit organization that provides an education program and centralized administrative services to multiple charter. An applicant affiliated with a CMO may apply for a charter application.

District-wide Assessments, also known as **State Assessments**, are a variety of assessment tools administered by the Office of the State Superintendent of Education (OSSE) to students enrolled in DCPS and public charter schools. Since 2006, DC has used the DC Comprehensive Assessment System (DC CAS), but will be transitioning to next generation assessments aligned to the Common Core State Standards in school year 2014-15.

Education Management Organization (EMO) is a for-profit organization that provides an education program and centralized administrative services to schools and/or school districts. For profit management organizations are not eligible to apply for a charter; applicants may contract with an EMO for educational or other services.

Education Service Provider (ESP) is either a CMO or an EMO.

Eligible Applicant is a founding group of individuals, a private or public or quasi-public entity, or an institution of higher education that seeks to establish a public charter school in the District of Columbia.

English Language Learner is a student enrolled in school whose native language is other than English and whose difficulties in speaking, reading, or understanding English may hinder achievement in classrooms where the language of instruction is English.

Enrollment ceiling is the cap on the number of students a school may enroll in a given year. Schools that enroll more students than allowed by their enrollment ceiling will not be funded for the additional students.

Experienced Operator is a charter management organization or existing charter school network that has a minimum of three years of high-quality, externally-validated performance data on a specific educational program it currently runs in another state that it wishes to replicate in Washington, D.C.

Founding Group is the group of individuals, or an applicant that is an Experienced Operator, who submit a charter application to PCSB to open a new charter school and, after being approved for a charter, work through the planning year(s) to open the school.

Individuals with Disabilities in Education Act (IDEA) is a federal law requiring local education agencies (LEAs) to provide a free and appropriate public education to every student with one or more disabilities. It was originally enacted in 1975 and is currently codified at Title 20, Chapter 33, Section 1400 *et seq.* of the United States Code.

My School DC is DC’s citywide enrollment lottery. All District of Columbia Public Schools and almost all DC public charter schools participate in My School DC, which offers a single application and lottery process. For more information, visit <http://www.myschooldc.org/>.

Parent refers to a person who has custody of a child and who is a biological parent or stepparent of the child, has adopted the child, or has been appointed as a guardian for the child by a court of competent jurisdiction.

Performance Indicators define the level of proficiency expected from students based on a reliable and valid assessment. They answer the questions: “How good is good enough?” “What is the expected level of growth from one year to another?” “What is the expected performance level desired at the end of the school year, grade level or program?” The performance indicator may be relative such as “exceeds the state average” or absolute, such as “90% of the students will perform at the proficiency level” or “all students will earn a score of 80.5”.

Performance Management Framework (PMF) is the PCSB’s accountability tool that measures school academic performance. As of the publication of these guidelines PCSB uses two frameworks—Elementary/Middle School PMF and High School PMF— and is developing and piloting three additional frameworks—Early Childhood, Adult, and Alternative Accountability. For more information about the PMF, see <http://www.dcpsb.org/MISC/pmf-resources.aspx>.

Petition means a written application.

Replicate means the practice of a single charter school or management organization opening several more schools that are each based on the same school model.

Student Learning Standards define what students are expected to know and be able to do. They define what is taught in each subject area and at each instructional level and what is likely to be tested to assess student achievement.

Students with Disabilities refers to students with disabilities as defined in the Individuals with Disabilities Education Act or Section 504 of Rehabilitation Act of 1973 (29 U.S.C. §§ 701 *et seq.*).

Application Review Process

Invitation to Apply

The Public Charter School Board invites interested individuals and groups to submit an application to establish a public charter school in the District of Columbia.

To apply as Experienced Operators, applicants must have at least three years of high-quality academic and non-academic outcomes as measured by state accountability systems.

Timeline to Open a School in Fall 2016

Any person or entity who expects to submit an application during the Fall 2014 application review cycle is strongly encouraged to complete and submit a “Declaration of Intent to Apply Form” included in Appendix A by **August 11, 2014**.

Date	Action Item
August 7, 2014	Public Information Session
August 11, 2014	Deadline for Submission of Optional Declaration of Intent to Apply Form
Friday, September 5, 2014, 12 p.m.	Optional: Deadline for Early Submission of Electronic Application for Confirmation of Completeness before Printing
Monday, September 8, 2014, 5 p.m.	Deadline to Submit Paper Copies of Application
October 22-25, 2014	Capacity Interviews with up to five founding group members
September 29 - October 3, 2014	Site Visits
October 20, 2014	Public Hearing with up to three founding group members
November 17, 2014	Board Decisions Announced Publicly
June 2015	Final Date to Sign Approved Charter Agreement for Schools Opening in Fall 2015

All dates are subject to change. Please check for updates on our website, dcpcsb.org, and by contacting our offices at (202) 328-5545 or applications@dcpcsb.org.

Standard for Approval

In addition to guidance on how to complete the application process and the questions to be addressed in the written application, these guidelines include the rubric PCSB uses to evaluate applications. Based on information gathered during the application process: (a) the written application, (b) PCSB visits to the operator's existing school(s), (c) the capacity interview and (d) public hearing, the applicant will receive a score on each section of either "Meets the Standard" or "Does Not Meet the Standard." Using this evaluation, the DC Public Charter School Board will vote at a public meeting for one of three possible outcomes for each applicant group:

- Full Approval: All standards for approval are completely met, including securing a facility.
- Conditional Approval/Approval with Conditions: Approved to open a new charter school only when board-created conditions are satisfied and the school receives Full Approval.
- Denial: No further consideration of the application.

Through the written application, site visit(s) to existing campus(es), capacity interview, and a public hearing, PCSB reviews applicant groups based on five criteria:

- (1) Demonstrated need for the school: the applicant makes a compelling the case for why the school fills an unmet need in the Washington, DC, educational landscape.
- (2) Sufficient progress in developing the plan: The founding group realistically assesses the challenges they will face in opening and operating a school and clearly describes how they expect to address those challenges. Essential elements of the school's academic and non-academic programming demonstrate how the school will be able to fulfill its goals and mission. In cases where elements of the application are not yet fully developed, such as securing a facility, the applicant presents an achievable timeline and framework.
- (3) Alignment with the mission and philosophy: The essential elements of the mission, philosophy, and school program are infused in each element of the Establishing the Need and Education, Business, and Operations Plans of the written application.
- (4) Inclusion of special populations: Each element of the school program is deliberately designed to include students with disabilities, English language learners, students who are academically struggling or advanced, and any other populations targeted in the mission (e.g. economically disadvantaged, at-risk, etc.)
- (5) Founding group ability: The founding group has demonstrated its ability to ensure that the proposed school can meet the educational objectives outlined in the application and is capable to be "Tier 1 on Day 1", including:
 - a. having a history of strong academic and non-academic results with student populations similar to those found in DC public schools;
 - b. understanding the DC educational landscape and how to attract students and families;
 - c. having effective controls in place to ensure short- and long-term financial stability and legal compliance; and
 - d. comprising members who have the combined skillset needed to replicate its program, or have put together an operational team with this skillset.

Each application is reviewed in its entirety. Reviewers are not only looking for the standards of each section to be met but also the ability of the founding group to implement the plan. Based on information gathered throughout the application process, the applicant will be considered for full approval or

conditional approval/approval with conditions only if it meets a majority of the standards for each component of the application guidelines, with particular weight placed on the Education Plan. Conditional approval may be granted even if there are some elements of the application that need improvement or further development, provided that the applicant group has demonstrated that it has the capabilities to adjust and improve its plans throughout the planning year.

Applications lacking in any of the areas above will be denied charter approval but permitted to reapply during another application cycle at least 12 months after the cycle in which it was denied.

Submitting an Application

Applicants must complete and submit all information outlined in the Application Contents section of these guidelines (starting on page 16) by 5:00 p.m. Eastern Time on September 8, 2014.

Applicants must submit:

- (1) five bound double-sided copies of the application with a table of contents, all pages numbered, and labeled tabs separating each section and appendices;
- (2) one complete electronic, searchable/OCR PDF of the entire application, including the budget spreadsheets and appendices, and signed signatures², submitted via a non-returnable USB flash drive or through secure file-sharing software;
- (3) one **redacted** electronic, searchable/OCR PDF version of the application, with contact information of founding group members (i.e. addresses, phone numbers, email addresses, etc.) removed.

PCSB offices are located at:

3333 14th Street, NW, Suite 210
Washington, DC 20010
202-328-2660
applications@dcpcsb.org

Please refer to **Appendix B: Application Checklist** to review PCSB's application intake procedures.

Applications will not be accepted after 5 p.m. on Monday, September 8, 2014. In case of DC government closure due to inclement weather or other unplanned event, applicants must submit both electronic versions of their application by 5 p.m. on the application due date; PCSB staff will respond shortly with confirmation of the receipt of the application and further instructions for submitting the additional required elements.

Optional: Remote Submission

Applicants may choose to submit their written applications remotely by sending the completed written application to a copy and print center near PCSB offices for printing and binding. There are three copy and print centers in PCSB's immediate vicinity. Applicants may choose any of these services or a different service, provided the printed applications are printed less than one-half mile away from PCSB's office or are delivered to PCSB's office. The closest print centers are:

² Typed e-signatures are not valid. Signatures should be either signed and then scanned into the document or included as a picture file within the PDF. For an example, see the Letter from the Board Chair on page 7.

The UPS Store
1380 Monroe St NW
Washington, DC 20010
(202) 234-4877

Staples
3100 14th St NW #115
Washington, DC 20010
(202) 939-0290

FedEx Office Print & Ship Center
3111 14th St NW
Washington, DC 20010
(202) 328-1050

Applicants submitting their written application remotely also need to submit the other required elements of the application remotely, including two electronic versions of the written application (one complete and one redacted). Submit both electronic versions of the application via secure file-sharing software by 5:00pm on Monday, September 8, 2014. Share the link or access to the files with applications@dcpcsb.org.

Optional: Early Electronic Submission for Completeness

Applicants who would like PCSB to review their application for completeness before officially submitting an application to PCSB may do any time up to noon on Friday, September 5.

Applicants who submit their application electronically for review will receive confirmation from PCSB that their application is/is not complete no later than noon on the Friday before the application due date. For incomplete applications, PCSB will specify which element(s) of the application are missing.

Written applications will not be accepted after 5 p.m. on the application due date.

Application Contents

The format provided in these guidelines allows eligible applicants to fully describe their plans for a proposed public charter school in four areas: Establishing a Need and Identifying a Target Population; an Education Plan; a Business Plan; and an Operations Plan. Following this format ensures an objective review of proposals to establish public charter schools in the District of Columbia.

Limit the overall length of Sections A, B, C, and D of the application to 150 pages. Elements of the written application marked with an asterisk (*) in the following table of contents count towards the 150 page limit.

Written applications should conform to the following table of contents:

Table of Contents

Applicant Information Sheet

Executive Summary*

A. Establishing a Need and Identifying a Target Population*

1. Target Population
2. Recruiting and Marketing

B. Education Plan*

1. Mission and Philosophy
2. Goals and Student Academic Achievement Expectations
3. Historical Academic Performance
4. Curriculum
5. Support for Learning

C. Business Plan*

1. Planning and Establishment
2. Governance and Management
3. Finance
4. Facilities

D. Operations Plan*

- Student Policies and Procedures
- Human Resource Information
- Implementation of the Charter

* Items marked with an asterisk count towards the 150 page limit.

Forms and Required Documents

- E. Budget and Finance
 - 1. Pre-Opening Budget
 - 2. Two-Year Operating Budget
 - 3. Estimated Five-Year Budget Projections
 - 4. Capital Budget
 - 5. Cash Flow Projection for Year One
 - 6. Financial Audits, including A-133, for the Last Three Years
 - 7. Annual Reports for the Last Two Years
 - 8. IRS Form 990 for the Last Three Years

- F. Board of Trustees Supporting Documents⁴
 - 1. Conflict of Interest Form

- G. Additional Required Documents
 - 1. Articles of Incorporation
 - 2. Bylaws
 - 3. Board of Trustees Performance Expectations
 - 4. Code of Ethics
 - 5. Conversion Endorsement Certification (if applicable)
 - 6. Discipline Policy
 - 7. Letter of Intent for Facility (if applicable)
 - 8. Management Agreement and Related Documents
 - 9. Assurances Form

- H. Course Curriculum
 - 1. Full Curriculum or Curriculum Sample⁵
 - 2. Scope and Sequence for Earning a High School Diploma, if applicable

- I. [Optional] Appendices

Sections A, B, C, and D should be limited to the content and criteria presented in these Application Guidelines. Additional information that may support the information presented in the narrative and that may help the Board better assess the application should be included in the appendices. Examples of such additional information include letters of support; program descriptions; and parent, student or faculty handbooks.

⁴ This section should not be included in the redacted version of electronic application.

⁵ Applicants may redact parts or the whole of Section G in the redacted electronic version of the application if they believe that these portions contain information that will cause substantial harm to the applicant's competitive position if released publicly.

Formatting Standards

All sections of written application, other than exhibits, should be in 12-point font. Pages should have margins of at least one inch on each side. All pages should be labeled with the name of the applicant and the page number.

Printed copies should be double-sided with labeled tabs separating each section and appendices.

Electronic copies should be searchable/OCR PDFs.

Applicant Information Sheet

For an editable version of the Applicant Information Sheet for Experienced Operators, please click here:
<https://docs.google.com/file/d/0B1jXQpCEXCTZMnF6M0kwVIRaU1U/edit>

Executive Summary

In no more than two pages, provide a descriptive narrative summary of the key features of the application.

A. Establishing the Need

1. Demonstrating a Need

- Describe the education needs of the population the proposed school is seeking to serve in the District of Columbia.
- Show how these needs are not being met by the existing public school options in your target area through analysis of student outcomes.
- What are the needs of the students your schools are serving in other geographic location(s)? How has (have) your school(s) met these needs? Specifically address the experience you have had with students with disabilities and English language learners.
- What are the similarities and differences between the needs and demographic profiles of students at your organization's current school(s) and the targeted population in the District of Columbia, and how are you preparing to address any differences?
- Briefly explain the research and performance record that demonstrate that the school model will be successful in improving academic achievement for the targeted student population.

2. Demographic Analysis

- Report data describing the *proposed* school's target population, including grades and demographics, and schools in the intended location that serve the same student population.
- Report data describing the operator's *existing* schools' student populations, including grades and demographics, and schools in the intended location that serve the same student population. Specifically address your experience with students with disabilities, English language learners, and any subgroups specifically included in your mission.
- Based on the information provided in the above analysis:
 - describe how the school will complement the existing array of options available to families.
 - describe how the school will compete with other schools in the recruitment of students.
 - describe the similarities and differences between the needs and demographic profiles of students at your organization's current school(s) and the targeted population in the District of Columbia, and how you are preparing to address any differences.
- Applicants are encouraged to use the Sample Demographic Analysis Tables available in Appendix A.

Note: Any further discussions of student demographics in other areas of the application should refer back to the Demographic Analysis as necessary.

- Charter schools are schools of choice and every child who applies to your school and is admitted through a random lottery process must be given a place at the school. How will you accommodate and welcome students who do not fit your intended population? How do you address this in your existing school(s)?

3. *Recruiting and Marketing*

[See D.C. Code § 38-1802.06]

a. Recruitment of Students

- What outreach efforts will be made to recruit families and students? Discuss how the school will be publicized throughout the community to attract students in your target population.
- Compare your planned outreach efforts with the strategies in place at your existing school(s). How successful have your recruitment and marketing methods been at your existing school(s)? Is/are the school(s) fully enrolled?
- Provide a timeline for student recruitment.
- If planning to locate the school in an area that is densely populated with public schools or seeks to attract a target population similar to many other DCPS and public charter schools, describe a recruitment strategy that is calculated to ensure adequate enrollment.
- If the school targets a specific population, describe how recruitment efforts will ensure a fair and equitable open enrollment process.
- If necessary based on the enrollment growth plan, describe plans for expanding school facilities, attracting additional qualified staff, and acquiring the other resources needed to serve a larger student body.
- It is common for a percentage of students to leave a school within the school year or over the summer. What is the proposed school's enrollment policy for back-filling grades both during the school year and between school years?
- Provide an overview of the organization's growth plan for developing new schools nationally, including the number and types of schools (i.e. grade levels) opening by year and the projected number of students at each school in other geographic location(s). Include open schools, schools approved to open, schools that will may open pending the results of active charter applications, and applications planned or under consideration.

Standard for Approval

Applications will generally be considered having met the standard for section A when the recruitment plan is designed to specifically attract the school's target population and it establishes a clear need for the type of school it is proposing by showing that there are students who are currently unable to enroll in a school of similar quality and mission either because the proposed educational program does not exist in D.C. or there is a demonstrated need for more schools of this type. The application demonstrates the strengths of the existing schools' recruitment plans and, if necessary, any improvements that will be made. The plans for growth in DC and nationally are aligned with the school's mission and philosophy. Plans for broadening and strengthening relationships with families and the targeted community are likely to provide the strong support the school needs.

Fundamental Characteristics

- There is a thoughtful analysis of how the school will meet its expected growth trajectory and provides a strong contingency plan if the school is under-enrolled.
- The applicant has a realistic understanding of what strategies will be necessary to successfully recruit its student body. The proposed policy for back-filling vacated seats is inherently inclusive of all students and aligned with the school's mission.
- The recruitment plan takes all students into account, including students whose families for whom English is not their first language.
- The plans for community engagement and student recruitment are likely to reach the identified constituents and student populations; are likely to fulfill enrollment targets; and are aligned with the school's mission and education philosophy.
- The application, including the Demographic Analysis, establishes a compelling need for the type of education program offered, particularly among the targeted population. The application shows (a) that there are currently no or too few schools serving the population well and that there will be sufficient demand to sustain the proposed school or (b) that existing similar programs in DC have proven to work well with the population.
- The Demographic Analysis demonstrates that the applicant has experience working with populations similar to those found in DC public schools and the populations targeted in their mission.
- The operator has been successful in recruiting students for its existing school(s) and has a realistic understanding of how it will need to adjust its strategy to fit the school landscape in DC.
- The operator's national and DC growth plan is feasible based on the application review team's expertise and additional research, and is aligned with the operator's mission and philosophy (especially regarding target populations).

B. Education Plan

1. Mission and Purpose

[See D.C. Code §§ 38-1802.02 (1), (2), (3)]

a. Mission and Philosophy

- Write a one-sentence mission statement for the proposed school. The mission statement should include the target population (the “who”), the educational philosophy or focus (the “how”), and the school’s general aims or what educational needs it will fill (the “why”).
- Briefly describe the proposed school’s philosophy for educating students. Include how you will ensure that all students, including those with disabilities and English language learners, will benefit from the proposed mission and philosophy.
- Briefly describe the experienced operator’s organization and how the mission of the proposed DC charter school aligns with and furthers the organization’s vision and mission.

b. Education Focus

- Discuss the key pillars of the existing model. What adjustments may be considered in expanding to DC? (E.g. All DC LEAs must provide a continuum of services for students with disabilities, including those requiring full-time aides.)
- What is the education focus of the proposed school? Describe ways in which the proposed school will be substantially the same or different from the experienced operator’s existing programs.
- How do(es) your existing program(s) add quality options to families in DC that are currently unmet or insufficiently met?

Standard for Approval

Applications will generally be considered having met the standard for section B.1 when the mission statement is clear and concise and fully aligns with the school’s education philosophy and program. The mission is evident throughout the application. Based on the operator’s past results, the education philosophy is proven to meet the needs of the targeted student body, including students with disabilities and English language learners. The applicant clearly describes the education focus of its existing school(s) and how it will be adjusted (if at all) to improve the educational options available to DC families.

Fundamental Characteristics

- The mission statement explains the “who” (targeted population), the “how” (education model), and the “why” (education philosophy).
- The application process, including the written application, capacity interview, site visit(s) (if applicable), and public hearing, demonstrate that the school’s mission and philosophy is consistently woven through the applicant’s planning and school development process.

- The applicant group demonstrates demand for the education program in DC and is able to show through past results that the education program is able to meet the needs of the target student population. Those past results include student bodies similar to those in DC public schools
- The mission is inclusive of all students, including students with disabilities, English language learners, and students above or below grade level.

2. *Goals and Student Academic Achievement Expectations*

[See D.C. Code §§ 38-1802.02 (1), 38.1802.02 (1)(3)(5)]

Goals and Student Academic Achievement Expectations (“goals”) are critical because they become the standard by which the approved charter school is measured during charter review and charter renewal. Goals are related to a school’s mission and may be categorized as academic, non-academic, and organizational, whereas academic expectations are student academic goals measured by assessments.

Applicants have three choices when developing goals. Each of these choices may be made either for the entire school or for specific grade spans within the school. The school may:

- a. Adopt the Performance Management Framework (PMF) as goals;
- b. Adopt individualized goals; or
- c. Adopt the PMF as goals and supplement with additional individualized goals.

If school elects different goals for different grade spans, it should ensure that each grade served by the school has goals that apply to it. Applicants proposing schools with a significant emphasis on non-academic learning during their proposed school day (including after-school programming and residential programming) such as life-skills, volunteerism, arts, should adopt specific goals to measure the expected student expected outcomes in addition to academic goals.

NOTE: Regardless of whether schools choose to adopt the PMF as their goals, PCSB will publish a PMF scorecard with tier, if applicable, annually for all schools. Also, all schools must reflect on their goal attainment in their annual report, required under the SRA.

a. Adopting the PMF as Goals

Applicants may choose to adopt the PMF as goals for all proposed grades. There is a specific framework for Early Childhood, Elementary/Middle, and High Schools, and Adult Education Programs.⁶

Applicants that anticipate eligibility for the Alternative Accountability Framework⁷ (AAF) and wish to adopt the AAF as their goals must develop the goals that would be included in their

⁶ For complete details on adopting the PMF as goals, please see http://www.dcpsb.org/data/files/policyelect_pmf_as_goals.pdf and <http://www.livebinders.com/media/get/ODIxNjI5Mg==>. If you are unable to access these sites, please contact PCSB.

⁷ For complete details on the AAF, please see http://www.dcpsb.org/data/files/alternative_accountability_policy_signed_2.19.14.pdf. If you are unable to access this site, please contact PCSB.

AAF, conforming to the standards listed below in b. Adopting Individualized Goals. Eligibility for the AAF cannot be confirmed until students are actually enrolled in the school.

b. Adopting Individualized Goals

Schools may choose to adopt individualized goals that capture critical, unique aspects of the school's mission and program as well as student academic achievement. **Schools must have math and English language arts goals for all grades** served by the school, including Early Childhood grades (pre-kindergarten through second grade). For schools whose grades cover those tested by the state assessment, your school must have one goal for reading and one for math that commits that the school will exceed the state average proficiency rate for that particular assessment.

Schools should consider creating at least three and no more than ten goals.

All goals should be SMAART goals:

- **Specific:** Each goal specifies content (e.g. literacy, math, language acquisition) and the students (e.g. all, specific grade level, returning students).
- **Measureable:** Each goal has a metric (assessment, such as the state assessment, or data set, such as attendance and discipline) that is designed to measure the goal and to be used with the tested population (e.g. CLASS for pre-K classrooms) and to provide the necessary data to determine goal attainment (e.g. NAEP, while a great assessment, does not have school-level or student-level data so cannot be used) OR includes a process by which the group will identify the appropriate assessments/data set.
- **Ambitious and Achievable:** Each goal meets or exceeds the targets within the PMF, when applicable, or is comparable to research-based expectations. If your goal uses the same assessment tool as one of the indicators in the PMF, your target must be as rigorous as one that would achieve at least 50% of the points for that indicator as indicated in the most current PMF technical guide.
- **Relevant:** Each goal speaks to the ultimate goal of the school (e.g. college persistence, language fluency) or core academics. Each goal includes a specific measureable student outcome (not teacher input) such as student absolute achievement or progress. (E.g. content mastery of math is an outcome; math teachers' qualifications are an input.)
- **Time-bound:** Goals are expected to be measured annually and reported on in a school's annual report, but some schools may choose to set some long-term targets. In this case, your goals and academic achievement expectations should include specific deadlines for achieving each target or aim.

c. Adopting the PMF as Goals Along with Individualized Goals

Applicants who choose to adopt the PMF as goals (consistent with Option A, above) may also elect to supplement it with goals appropriate to their unique mission and program (e.g. a bilingual school may want a progress goal in the target language, a performing art school may want a goal around student expression in the performing arts). These additional goals should be SMAART goals, as described above in Option B.

Standard for Approval

a. Adopting the PMF as Goals

If the applicant elects to adopt the PMF as goals, applications will generally be considered having met the standard for section B.2, unless there is clear evidence that the founding group does not understand the PMF or the implications of this decision.

b. Adopting Individualized Goals

If the applicant does not elect to adopt the PMF as goals, applications will generally be considered having met the standard for section B.2 when its goals are SMAART (Specific, Measurable, Ambitious and Attainable, Relevant, and Time-bound); exhaustive, including all crucial elements of the academic and non-academic program; fully aligned with the proposed school's mission and philosophy; and inclusive of all students.

c. Adopting the PMF as Goals Along with Individualized Goals

If the applicant elects to adopt the PMF as goals along with individualized goals, applicants must meet the standards of both (a) and (b) above.

3. Historical Academic Performance

- a. Submit quantitative data for each existing school operated by the applicant group for at least the previous three completed school years. When appropriate, this must be submitted via links to public websites where the data are stored, such as a State Education Agency's school report cards and an authorizer's accountability framework or spreadsheets on company's logos or the school's published annual reports. Submit data including:
 - Performance data for all student subgroups⁸ served by grade level on state accountability assessments and/or other externally validated assessments (e.g. Northwest Evaluation Association (NWEA), Terra Nova);
 - Data that compare school performance with other schools in the state, including comparisons with all schools in the state by subgroup population and grade level;
 - Non-academic indicators that describe the school's performance including attendance, retention rates, graduation rates, college enrollment and/or persistence rates, numbers of suspensions and expulsions, and demand as evidenced by waiting lists, as compared to similar schools in the state and/or district;
 - Any additional evidence that the existing design has been effective in raising student achievement.

When available, state or authorizer accountability data must be submitted. Data from other sources, e.g. internal analysis, external researchers, etc., may be submitted for metrics not tracked or published by the state or authorizer.

- b. Explain the data trends, the summative assessments or indicators, and the school's performance, including trends, strengths, and weaknesses as shown in the data. This should include evidence of closing achievement gaps and moving low-performers to higher proficiency levels.
- c. Applicant groups may also choose to submit qualitative data or unique accomplishments evincing the experienced operator's effectiveness in raising student achievement or achieving mission-specific goals. For example, applicants may choose to submit information on earning National Blue Ribbon Schools Commission recognition or similar accolades, the number of students achieving state-recognized honors such as National Merit Scholarships, etc.

Note: These data should be provided for all schools associated with the. If incomplete or no data is available for specific schools or subgroups, provide a reason (e.g. school is in its first year of operation, no English language learners at a campus).

Standard for Approval

Applicants will generally be considered having met the standard for section A.3 when the applicant

⁸ At a minimum, subgroups should include: race, ethnicity, Students with Disabilities, English language learners, and low-income or at-risk students.

presents compelling quantitative evidence that the experienced operator has had at least a three-year track record of success educating students similar to those targeted by the proposed school. Specifically, a successful applicant will have externally validated (from a charter authorizer or state education agency) that shows the school has achieved high levels of student proficiency and growth, and reduced student achievement gaps as measured by the state's assessment.

Fundamental Characteristics

- The operator has achieved above-average proficiency and growth rates for its students (in aggregate, by student subgroup,⁹ and by grade level) on the state assessment, college entrance exams, and/or externally validated assessments (e.g. Terra Nova, NWEA, Scantron) for schools with untested grades or alternative populations.
- If available, the operator's schools are consistently ranked among the best of comparable schools by its state education agency and/or authorizer.
- Non-academic data show low percentage of exclusionary incidents, i.e. expulsions, out-of-school suspensions, and high percentages of eligible students re-enrolling in the school.
- Any anomalies in the operator's performance – such as short-term drops in student proficiency or growth – are explained in the narrative along with specific strategies the proposed school will employ to avoid reoccurrence of these anomalies in the proposed DC school.

⁹ At a minimum, subgroups should include: African American students, Hispanic/Latino students, Students with Disabilities, English language learners, and low-income students.

4. Curriculum

[See D.C. Code §§ 38-1802.02 (3), (4), (5)]

In this application, *curriculum* is defined as the combinations of standards, resources/instructional materials, methods of instruction, and formative assessments used to determine student progress. In this section, applicants must propose curricula and write a narrative describing the reasoning behind their curriculum choices for each of the core academic subjects (English, math, science, and social studies), electives (e.g. physical education, health), and mission-specific subjects (e.g. art, language, life skills). Organizing the answer to this question should be done by academic content area and should include descriptions for each grade span ultimately taught at the school. The section can be organized in two ways: organize by content area and complete curricular elements (a-e) for each, organize by curricular element (a-e) and complete for each content area.

Applying as an experienced operator, the expectation is that you will be using the same curriculum currently used at your existing school(s) and only slight modifications should be made to reflect regional differences in standards and resources. If you are developing a brand new curriculum, you should use the Charter Application Guidelines for New Schools¹⁰. Experienced Operator applicants must also include the full course curriculum for each of the core subject areas in order to receive full approval. See instructions for **Section H** for more information. Please use the section below to explain your curricular choices while Section H should contain a curriculum sample for review.

Applicants proposing schools with non-traditional calendar structures (e.g. year-round, residential/boarding, and virtual/blended/flipped programs) should include for those program elements in the curriculum section.

- a. Student Learning Standards (What will students learn at your school?)
 - What learning standards are used for each essential subject, and why did you choose these standards? Include English, math, science, and social studies/history, health¹¹/physical education, and any mission-specific discipline (e.g. life skills, art) taught at your school.
 - How does the selection of these standards ensure that all students will be nationally and internationally competitive, educated individuals in the 21st century? Include a discussion on how the standards lead to the ultimate achievement of the school's goals and mission.
 - What additional standards for learning English do you currently/do you plan to incorporate to ensure that students who are not fluent in English will be able to learn English as well as the academic content?

¹⁰ The Charter Application Guidelines for New Schools are available here: <http://www.dcpsb.org/Start-a-Charter-School/New-Charter-School-Start-Ups.aspx>

¹¹ Health is a mandatory subject in DC according to D.C. Code § 38-824.02. See <http://osse.dc.gov/publication/health-standards> for more details about DC health standards.

- What adjustments, if any, do you currently make to learning standards to meet the needs of students far above or below grade level, including students with disabilities?
 - How are DC standards similar to and different from the standards used by your school(s) in other states, and how will any differences impact your curriculum? What changes, if any, did you make to your choice of standards and what do you anticipate will be challenges with implementing these standards in DC?
 - Describe the progression of standards as students matriculate through the school. Demonstrate that the standards for each year will build off the previous year's learning.
- b. Methods of Instruction (How will students learn/teachers teach?)
- What methods of instruction will be used in each subject area and grade span? How will the methods help students learn the standards?
 - How do/will you accommodate different learning styles and the needs for all students, including English language learners, students with disabilities, and students who are far below or above grade level?
 - Why are the proposed methods of instruction well suited to teach the standards to the anticipated student population? How do they help students meet your goals and student academic achievement expectations?
 - How do these methods align with your school's mission and education philosophy?
 - Describe the progression of instructional methods, if any, as students matriculate through the school.
 - How are the methods of instruction proposed for your DC school similar to and different from the methods used by your school(s) in other states, and how will any differences impact your curriculum? What changes, if any, did you make to your choice of methods and what do you anticipate will be challenges with implementing these methods in DC?
 - Describe how staff at existing school(s)/charter network will help support the DC staff with learning the instructional strategies both before the school year starts and during the school year?
 - Will there be any sharing of best practices in instructional strategies among your network of schools? How will you ensure that the caliber of teaching in DC will be at the same level as at your existing schools?
- c. Resources and Instructional Materials (How will students learn at your school?)
- What resources/instructional materials have you identified that complement the instructional methods and will help students learn the standards in each subject area and grade level? Instructional materials include but are not limited to: text books/workbooks, novels, online programs, manipulatives, teacher resources, smart-boards, computer software. If you have not yet identified all resources, describe the criteria that will be used to select compatible resources and instructional materials and how these
 - What resources will you need to meet the needs of all learners, including English language learners, students with disabilities, those who are far below or above grade level, and those who enter school in later grades?

- How will these resources and materials lead to student mastery of the standards listed above while also creating a culture of learning that supports the school’s unique mission and education philosophy? Cite examples where these resources have been used with similar populations, including at your existing schools.
 - Discuss any substantial variations in resources between what you propose for your DC school and in your established schools and the rationale for those variations.
 - If applicable, describe what, if any, changes you anticipate making in your choice of resources for your DC schools?
 - How will your existing school network support make sure that the DC school has access to all of the needed resources from day one of operation?
 - Include the timeline for developing a complete curriculum in the planning year; include dates for curriculum maps, unit plans, and lesson plans to be completed. Note: Applicants may refer directly to the Planning Year Timeline in Section B.5.a. if it includes the curriculum development timeline.
- d. Assessing Learning (How will you know students are learning?)
- How will teachers check for understanding of students learning and progress towards mastery? How, if at all, will leaders oversee these checks or assessments to ensure school-wide learning is on track to meet the school’s goals and academic achievement expectations?
 - How will parents be notified of students’ progress and achievement?
 - How will your network of schools ensure that students at the DC school will have similar learning outcomes to students currently attending your existing schools?
- e. Vertical Alignment and Promotion Requirements
- High Schools: Describe courses that must be completed at each grade level and in each discipline to receive a high school diploma. How many credits is each course worth? What procedures will the school institute to ensure students do not fall off track to graduate, and what supports will the school have in place to support students who are not on track to graduate when they arrive? Include how students with disabilities and English language learners and “at-risk” populations are kept on track to graduate.
 - Adult Education: Describe the requirements a student must meet to obtain a secondary credential, i.e. GED, career certification, and/or language acquisition certification. Describe the proficiency level(s) that a student must attain to be promoted to the next level or to successfully exit the program.
 - Pre-kindergarten, elementary, and middle school programs: Based on the standards discussed above, under what circumstances would a student be retained between grade levels or at the school’s terminal grade? What supports will be in place to ensure students are eligible for promotion, regardless of their academic progress at the beginning of the school year? Include how students with disabilities and English language learners and “at-risk” populations are provided additional support, if needed, to matriculate through the school with their peers.

Standard for Approval

Applications will generally be considered as having met the standard for section B.3 when the application provides a comprehensive curriculum, defined here as standards, resources, methods of instruction, and formative assessments. The curricular components are clearly interrelated and directly aligned to the goals, mission, and education philosophy. The curriculum is accessible to all learners, including students with disabilities, English language learners, those who are struggling learners, and those who are advanced. The vertical alignment between grades or grade bands leads to attainment of the school's mission/ultimate goals, and each subject area serves a distinct purpose in the students' development. The basis of the curriculum has proven effective in the applicant's existing school(s).

Fundamental Characteristics

- A full curriculum is included in **Section H** for every grade level and core subject area (academic and non-academic) the school plans to serve at capacity. If applicable, the applicant includes a timeline and explanation for any planned curriculum adjustments.
- Each element of the Curriculum for each discipline is supported by a compelling case, i.e. experience and/or research.
- Either the applicant chooses the Common Core State Standards for English language arts and mathematics or equally strong standards that emphasize critical thinking. For other subjects, the applicant group identifies rigorous standards that align with the school's mission, goals and academic achievement expectations.
- The curricular components reinforce the school's chosen mission and education philosophy.
- Embedded in the instructional methods and resources are concrete strategies and materials to help students with disabilities, English language learners, and academically struggling students to meet the goals and student achievement expectations as listed in B.2.
- The curriculum's scope and sequence progresses in complexity and depth and each component builds on the previous.
- The school identifies how the curriculum is accessible to **all** learners, including students with disabilities and English language learners.
- The curriculum includes examples of how differentiation occurs for students who are academically advanced or struggling.
- For schools with non-traditional calendar structures (e.g. year-round, residential/boarding, and virtual/blended/flipped programs): The applicant accounts for the non-traditional element of its program in its curriculum. For example, a residential/boarding program describes how evening time will be used for academic or non-academic instruction, and what standards, methods, and resources will be used to support that learning.

5. *Support for Learning*

[See D.C. Code §§ 38-1802.02 (10), (11), (14)]

Applicants proposing schools with non-traditional calendar structures (e.g. year-round, residential/boarding, and virtual/blended/flipped programs) should include those program elements in the Support for Learning plan.

a. **Planning Period**

- Provide a calendar of activities that the school will undertake from charter approval to opening day, include such milestones as:
 - Transitioning to a Board of Trustees;
 - Establishing a DC home office;
 - Identifying and/or hiring key personnel;
 - Finalizing curriculum, including purchasing assessments and materials;
 - Creating discipline, attendance, promotion, and grading policies approved by your school’s Board of Trustees and by PCSB, to be included in your charter agreement;
 - Hiring instructional staff;
 - Identifying, purchasing and renovating (if necessary) a facility;
 - Engaging the community;
 - Recruiting students; and
 - Other planning activities.
- Discuss what you anticipate will be the challenges of entering a new city and how you expect to address these challenges.
- Explain what will be provided by the home office and/or existing school(s) in your organization to ensure that the new school has a successful opening.

b. **School Organization and Culture**

- Complete the following table for every existing school campus serving similar grades as the proposed school for at least the last two years and discuss the results.

School Name	In-seat attendance rate ¹²	
	2012-13	2013-14

¹² In-seat attendance rate is calculated as the sum of all students’ number of days present divided by the sum of all students’ number of days enrolled.

- Describe what strategies are implemented at your existing school(s) to encourage high attendance rates.
- Describe the strategies your existing schools use to encourage high re-enrollment rates.
- Describe how you will welcome and integrate students into your culture who arrive at your school in upper grades or in the middle of the year, if applicable.
- Describe the methods you have used at existing schools to establish your desired school culture.
- Describe the plan for building a positive learning environment and culture for all students at the proposed school, including students with disabilities and English language learners, and those who enter mid-year or after the first year of enrollment.
- Describe your complaint resolution (grievance) policy for parents and students. This policy should be aligned with the requirements of IDEA, Section 504, and Titles IV and IX.

c. Safety, Order and Student Discipline

- Complete the following table for every existing school campus serving similar grades as the proposed school and discuss the results.

School Name	Students with 1 or more days of out-of-school suspensions		Students with 10 or more days of out-of-school suspensions		Students with disabilities with 1 or more days of out-of-school suspensions of		Expulsions	
	#	%	#	%	#	%	#	%

- Describe how the proposed school will ensure that it has a safe and orderly environment to protect the health and safety of students and faculty.
- Describe the school’s philosophy regarding student behavior and discipline for the general student population and for students with disabilities. Explain how this philosophy supports the school model, mission, and education philosophy.
- Provide the proposed school’s discipline policy for each grade span offered at full capacity or a timeline for completion to be included as part of the charter agreement.
- PCSB takes discipline policies very seriously and publishes annually each school’s out-of-school suspension, attendance, expulsion rates through the DC Equity

Reports.¹³ How will you ensure that your school's rates are in-line with the sector averages?

Note: Include a copy of a discipline policy from an existing school serving a similar student population in **Section F**.

- d. Professional Development for Teachers, Administrators and Other School Staff
- Describe the professional development that will be provided to teachers, administrators and staff to implement the education program and meet the proposed goals.
 - Explain how a pipeline of potential leaders for the network as a whole has been developed or planned.
 - Address specific professional development plans related to teaching students with disabilities and English language learners, including professional development for all staff on the proposed school's special education service delivery model, teacher responsibility to address IEP goals, accommodations, and modifications.
 - Applicants proposing schools with non-traditional calendar structures (e.g. year-round, residential/boarding, and virtual/blended/flipped programs) should describe the unique challenges and opportunities of designing professional development with a non-traditional calendar and the staff.
- e. Structure of the School Day and Year
- Provide a draft of the proposed school's calendar (including the number of days the school will be in session), the daily hours of operation, and how the school day and year will be organized for instruction, assessment, independent study, professional development, parent-teacher conferences and extra- or co-curricular activities.
 - Include dates if the school year would need to be extended due to unexpected school closures resulting from inclement weather and/or emergencies.
 - Include before-care and after-care options, if applicable.
 - If you plan to operate a school that does not follow a traditional schedule (August-June, approximately 180 6-hour days), describe how the structure of the day and year will support the school's mission and goals.
- Please note that the school must meet or exceed a minimum of 1080 hours (180 days x 6 hrs)*
- f. Family Involvement
- Describe the proposed school's philosophy around family engagement, and how it plans to promote this philosophy. Address how you will include families in your activities and communications who cannot speak and/or read and write in English.

¹³ The DC Equity Reports are available here: http://www.dcpsb.org/pdf/DC_Compndium_Final_20131209.pdf

- Describe the parent trainings, programs, or initiatives, if any, that will be implemented to support students' families.
- Describe how parents will be informed of their students' academic and non-academic progress.
- Describe any initiatives currently in place at the existing school(s) to support family engagement in student learning.
- DC has many charter school quality materials that are shared publicly via LearnDC.org and PCSB's website. Describe how families will be made aware of the proposed school's performance on PCSB's Performance Management Framework (www.dcpsb.org), the state's accountability index (www.learnDC.org), the city-wide Equity Report (www.dcpsb.org), and the school's annual report ((www.dcpsb.org or individual schools' websites).
- Describe how the proposed school's technology structure or plan will aid in general communication with students, and parents.
- Explain how staff at the existing school(s) will support the proposed school in building its family engagement plans and implementation.
- Describe the way the school plans to inform parents about their and their child's rights associated in accordance with IDEA, Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. 701 *et seq.* (Section 504), and all other applicable civil rights laws.
- Describe how you will notify parents in case of school closure, early releases, and late starts due to inclement weather or emergencies.
- Applicants proposing schools with non-traditional calendar structures (e.g. year-round, residential/boarding, and virtual/blended/flipped programs) should describe how their family involvement plan will differ from those of more traditional school programs.

g. Community Participation

- Describe how the existing school(s) are engaged in the surrounding community, addressing any significant positive initiatives and negative interactions that have occurred.
- Describe how the DC community will be engaged in the planning, development and implementation of the proposed school.
- Describe any partnerships the school will have with community organizations, businesses or other education institutions.
- Specify the nature, purposes, terms and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student learning opportunities.
- Applicants proposing schools with non-traditional calendar structures (e.g. year-round, residential/boarding, and virtual/blended/flipped programs) should describe how their community participation plan will differ from those of more traditional school programs.

h. Extracurricular Activities

- Describe the types of sports, recreational, clubs and other extracurricular offerings that are planned; include plans, if any, for participation in intramural sports with other charter and district schools.

- Discuss how you will make these programs accessible to all students, including those who may be economically disadvantaged.

Standard for Approval

Applicants will generally be considered having met the standard for section B.5 when the applicant demonstrates:

- Sufficient progress in developing the plan: The founding group shows knowledge of the potential pitfalls in opening a school by identifying plausible challenges (both unique and common) that they will face in opening and operating a school and solutions to those challenges. Essential elements of the Support for Learning program are explained with thorough detail. For elements of the application that are not yet fully developed, the applicant presents an achievable timeline and framework for fully developing the school program.
- The applicant demonstrates a comprehensive understanding of families' needs of the target population by addressing the potential barriers through each element of the support for learning plan.
- Alignment with the mission and philosophy: The essentials of the mission and philosophy are infused in each element of the Support for Learning plan. In the case of schools with non-traditional calendar structures (e.g. year-round, residential/boarding, and virtual/blended/flipped programs), this includes how the elements of the Support for Learning plan will need to be adjusted to the uncommon school program.
- Inclusion of special populations: Each element of the Support for Learning component is deliberately designed to include the families of students with disabilities, English language learners, students who are academically struggling or advanced, and any other populations targeted in the mission, e.g. economically disadvantaged, at-risk, etc.
- Founding group ability: The founding group has demonstrated its ability to meet the educational objectives outlined in the application and its capabilities to build and implement a successful school program.

Each element of the Support for Learning plan (parts a-h) will be judged according to the above criteria.

C. Business Plan

1. Planning and Establishment

[See D.C. Code §§ 38-1802.02 (8), (13), (14), (16)]

a. Profile of Founding Group

- Identify the key members of the founding group and provide a brief bio of each member, highlighting what experience they will bring to the school. Identify only individuals who will play a substantial and ongoing role in the school's development, governance and/or operation and will thus share responsibility for the school and/or network's education success. Identify which of these key individuals will transition from the founding board to the governing board or who will become staff at the school.
- If founding group members have direct experience founding, governing, operating or teaching at an existing school, describe the founder's involvement with the school. If the school has closed or is slated for closure, describe the circumstances that led to the closure.
- Distinguish between founding group members who are part of the Experienced Operator organization and founding group members who are from the local community. If there are no or very few founding group members from the local community, describe your plans to establish connections to the DC community. (Refer to Section C.1.b below, as appropriate.)

b. Planning Process

- Explain how and why the Experienced Operator decided to form a school in Washington, DC.
- Describe how the DC community will provide input in planning for the charter school and, what, if any, input has already been solicited from the community to develop the application.

Standard for Approval

Applications will generally be considered having met the standard for section C.1 when the founding group has articulated a convincing rationale for opening a school in DC and the participants in the planning process have all areas of knowledge and expertise necessary to operate a successful charter school.

Fundamental Characteristics

- The planning process includes participants with expert professional knowledge and requisite skills in all areas needed to operate a successful public charter school, including organizational, financial, legal, real estate/facilities, and other operational capabilities along with extensive, recent, and relevant teaching experience with a similar population the school plans to serve, including students with disabilities requiring extensive services.

- If the budget includes private fundraising revenue of more than 5% of its income, the founding group includes a member or advisor with significant fundraising expertise.
- The planning process includes a timeline and strategy for engaging local stakeholders, if relevant.
- The founding group has demonstrated that it has expertise in all of the key areas needed to run a school, or has identified specific individuals or organizations to support the founding group through the planning year, including serving students with disabilities and English language learners.
- The proposed legal structure, bylaws, and articles of incorporation (Section G) meet the requirements of the DC School Reform Act, including:
 - The bylaws or articles of incorporation contain a dissolution clause specifying that upon revocation or relinquishment (closure) the school will develop a plan to return funds to OSSE. D.C. Code §§ 38-1802.04(c)(16), 38-1802.13a.(c)(1).
 - The term “Public Charter School” is used in the name of the school in incorporation or bylaws documents either as the corporation or “doing business as.”
 - The conflict of interest clause clearly explains procedures for dealing with potential conflicts.
 - The bylaws do not specify that the nonprofit can operate for religious purposes.

2. *Governance and Management*

[See D.C. Code §§ 38-1802.02 (7), (9); 38-1802.05]

a. Board of Trustees

- Describe how the experienced operator will create a local Board of Trustees as required by the SRA: the Board of Trustees must include not more than 15 people, including two parents, a majority DC residents, and an odd number of people.
- Explain the procedure by which board members have been and will be selected.
- Describe how the board will be organized to manage and provide strategic direction for the proposed school.
- Explain the relationship the board will have with the educational service provider, including how and by whom a service contract will be drafted and negotiated.
- Outline the succession plan for the board members and leadership.
- Describe how the Board of Trustees will hold school leadership and/or, if applicable, the charter management company accountable for meeting the goals set forth in the charter, holding students to high learning outcomes, and ensuring that there is a “demand” for the proposed school.
- Describe the relationship of the Board of Trustees to the school’s administrative structure and staff, and to parents and students.
- In the case of a contractual relationship with a for-profit education service provider, describe how the contractual relationship is arms-length, competitive, and easily severed by the local board.
- Describe how the Board of Trustees will comply with DC Nonprofit Corporation law, Title 29, Chapter 4 of the D.C. Code.

Note: Provide Board of Trustees’ performance expectations in **Section G** of the application.

Note: The PCSB reserves the right to conduct background checks on the Board of Trustees for those applications that are granted full approval or approval with conditions.

b. Rules and Policies

- Discuss the powers and duties of the Board of Trustees.
- Describe the Board of Trustees’ ethical standards and procedures for identifying and addressing conflicts of interest.
- Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

Note: Submit a Code of Ethics Statement in **Section G** of the application.

c. Administrative Structure

- Describe the administrative structure of the school.
- Describe the role the ESP will play in operating the school on a day-to-day basis.
- Explain how the parents, teachers, community members, and students of the proposed school will have input in decision making, including during the planning year.
- Include an organization chart to illustrate the administrative and reporting structure of the school and Board of Trustees.

d. Historical Financial Performance of Experienced Operator

Provide the following information to demonstrate that the Experienced Operator has the capacity to successfully replicate its program in the District of Columbia:

- A list of all other schools managed by the Experienced Operator with addresses, contact information, and demographic profiles of the student body or bodies.
- In **Section D**, include three years of audited financial statements and management letters and most recent internal financial statements for the organization as a whole and any related business entities. Include A-133 “single audit” reports and IRS 990 forms (if applicable) along with the financial statements.
- Disclose any schools you have operated that have closed, and describe any sanctions placed on the Experienced Operator’s schools short of closure, including, but not limited to, shortened or conditional renewals, withdrawals of charters, non-openings of schools, interventions caused by performance deficiencies, or compliance violations.
- Disclose any management contracts broken or severed with any schools and any current or past litigation that has involved the applicant or any school it operates.
- Disclose any negative publicity that the applicant has received, including any publicity that PCSB would discover through researching public records, explain the circumstances of such publicity.
- In the case of a CMO or EMO, include a draft contract between the company or network and the school’s Board of Trustees with a clear description of the services to be provided by the ESP, including:
 1. the roles and responsibilities of the ESP in relation to the school’s management, to the school’s governing body, and to the applicant, if applicable;
 2. a term sheet indicating the fees proposed to be paid by the proposed school to the ESP;
 3. the length of the proposed contract;
 4. any options included in the contract for extensions;
 5. provisions for termination;
 6. academic, financial and operational performance expectations for the ESP; and
 7. how the governing board will monitor and evaluate the ESP’s performance.

Note: In **Section G**, include an organizational chart showing the relationship among all business entities being operated by or affiliated with the Experienced Operator.

Standard for Approval

Applications will generally be considered having met the standard for section C.2 when the composition of the proposed school’s Board of Trustees meets the requirements of the SRA. There is clear differentiation of roles and responsibilities of the proposed school’s Board of Trustees, the

administrative leadership of the school, and the ESP. There are clear policies and procedures to govern the school in an ethical and legally compliant manner. The submitted organization chart illustrates the roles of the proposed school's Board of Trustees, administrative leadership, and the ESP. The experienced operator provided all requested documentation, including records of any negative publicity.

Fundamental Characteristics

- The proposed school's Board of Trustees will be comprised of an odd number of trustees (not to exceed 15), include two parents, and will have a majority of DC residents.
- The governance structure is strong and includes all key elements (board member expertise in relevant areas, committee structure, succession plan, bylaws and articles of incorporation comply with the SRA) necessary to ensure the school is equipped to meet its mission, goals, and academic achievement expectations.
- The governance structure creates a forum for parent, teacher, and community input and the strategies for communicating board priorities and decisions include all stakeholders and minimize opportunities for conflict and misunderstanding.
- The relationship between the board and the ESP is fully defined, including:
 - a detailed list of services included;
 - performance evaluation measures;
 - the roles and responsibilities of the board of trustees, school staff, and the ESP;
 - disclosure of existing relationships between the founding group and the ESP, including potential conflicts of interest; and
 - conditions for contract renewal or termination, including effective procedures for terminating the relationship in case of academic, financial, or operational failure.
- The applicant has a demonstrated history of and plan for continued effective fiscal and organizational management, including:
 - structurally balanced budgets for all schools, with a particular emphasis on effective budgeting during the first two years of a new school or campus's operations;
 - adequate liquidity to support the DC school in case of financial hardship;
 - no instances of financial mismanagement or pending lawsuits; and
 - a strong net asset position relative to the size and budget of the proposed DC school.
- The proposed fees charged by the ESP are reasonable based on the level of services to be provided.¹⁴ The financial relationship between the ESP and the school are clearly separable. Shared employees or other shared costs between the charter school and any other organization are kept to a minimum and, when present, are based on transparent cost sharing criteria.

¹⁴ While the fee level will change based on the level of services provided, PCSB expects that the fee will not be above 15-17%. PCSB is particularly opposed to fees set at 100% of the school's revenue.

3. Finance

[See D.C. Code § 38-1802.02 (6)]

For more information on PCSB's oversight of schools' finances, please see <http://www.dcpsb.org/Data-Center/Accountability-002D-Academic-and-Fiscal.aspx>.

a. Anticipated Sources of Funds

- Indicate the amount of funding you expect to receive from the per-pupil allocation; include add-ons for grade levels, students with disabilities, and English language learners. Indicate the amount and sources of additional funds, property or other resources expected to be available for the costs of planning, start-up, and operation of the proposed public charter school. Where grants or loans are included, indicate which of these are in hand and which are anticipated. For anticipated grants or loans, provide evidence of firm commitments when available.
- Describe what contingencies are in place in the event that funds for per-pupil allocations are not available when expected or are lower than expected, including as a result of lower than expected enrollment levels.
- Explain the specific financial goals and objectives for the projected five-year budget (e.g., capital improvements, equipment, increased instructional and staffing costs).
- Describe anticipated financial transfers between the school and the ESP or its affiliates, if applicable. This would include start-up or other funds provided to or loaned to the school, management fees, and other payment paid by the school.

b. Planned Fundraising Efforts (if applicable)¹⁵

- Describe any planned fundraising efforts to generate capital or to supplement the per-pupil allocation for operating expenses.
- Discuss plans for raising funds to cover planning and development expenses expected to occur prior to opening the school.

c. Anticipated Financial Outlays

- Describe the resources necessary to operate each key element of the academic program (e.g. teaching staff, curricular materials) and mission (e.g. transportation for field trips, counselors for at-risk students) and how much funding will be necessary to secure these resources. How were these cost estimates developed? Differentiate between costs that are fixed or variable based on the number of students.
- Describe what contingencies are in place in the event that outlays are higher than expected for specific programs.
- Include a list of all components that make up each line item in the budget. For example, the narrative description corresponding to teacher salaries should provide a

¹⁵ PCSB does not require schools to engage in ongoing fundraising to support their program, though many existing schools do.

detailed itemization of the number of teachers and average salary budgeted (i.e., 20 teachers @ \$50,000 = \$1 million).

d. Financial Management and Accounting

- Describe the financial management and internal accounting procedures of the school, including the fiscal controls that will be put in place to ensure accountability.
- Describe the school's cash flow management plan and how it will ensure availability of funds throughout the year.
- Describe how the charter school's resources will be segregated from those of the affiliate organization, if applicable, including exclusively local use of DC public funding.
- Describe how the ESP will comply with the contract procurement requirements of the D.C. Code § 38-1802.04(c).

Note: The charter school must maintain its financial records in accordance with generally accepted accounting principles (as defined by the American Institute of Certified Public Accountants).

e. Civil Liability and Insurance

- Indicate the types of insurance and the levels of coverage sought.

f. Provision for Audit

- Describe the provisions that will be made for conducting annual audits of the financial operations of the school.

4. Facilities

[See D.C. Code §§ 38-1802.02 (6); 38-1802.09]

a. Identification of a Site

If a facility has been identified:

- Provide the address and ward location of the proposed site for the school. Provide a general description of how the facility meets the school's programmatic needs, including occupancy limits, accessibility for students with limited mobility, and fulfillment of all mission-critical space requirements.
- Describe any renovations and related expenses that may be required.
- If the site will be leased, include a final or draft lease or identify the terms of the lease. If the site has been purchased, attach a copy of the deed of trust. If the lease or purchase is not final, refer to the Planning Year Timeline in section B.4.a.
- If the identified site is intended to be temporary, describe options and include a timetable for identifying and acquiring a permanent facility, similar to the questions listed below.
- If proposing to convert an existing public school, include in the discussion whether D.C. has agreed to or will be expected to provide any capital improvements to the site.

If a site has not been identified:

- List the addresses and wards of sites under consideration that meet the school's programmatic needs, including occupancy limits, accessibility for students with limited mobility, and fulfillment of all mission-critical space requirements. Refer to the Planning Year Timeline in section B.4.a.
- Describe the effect that the location will have on the student recruiting strategy or other costs like transportation.
- Describe how the school will compete with other schools in securing a facility.

Note: No applicant will receive final approval of its charter until the applicant has demonstrated that it has acquired title to or has otherwise secured the use of a facility. If converting an existing public school, include a Letter of Intent in **Section G** indicating the terms and conditions of the proposed lease.

b. Financing for Facilities

- Describe expected financing for acquisition (i.e., purchase, lease) and renovation of a facility, including sources of loans, if applicable. Provide comparable properties that were used to develop the estimates.

c. Building Maintenance

- Describe plans for building maintenance, including how applicable codes and standards are continuously met.

Standard for Approval

Applications will generally be considered having met the standard for sections C.3 and C.4 when Finance and Facilities plans are thoroughly developed and aligned with the proposed school's mission and education program. The budget is balanced and conservative; reflects all necessary outlays outlined in the Education Plan; and includes contingencies for unexpected budget shortfalls. The revenue projections are solid, realistic, and sufficient to meet school expenditures. The fiscal management practices ensure long-term viability for the school. Both the Finance and Facilities plans are realistic and informed by accurate assessments of the DC education landscape, including key funding opportunities and facilities availability.

Fundamental Characteristics

- The budget is balanced, error free, and based on realistic expectations for income and expenditures.
- The Finance plan demonstrates a clear understanding of the Uniform Per Student Funding Formula, key private funding opportunities (e.g. Walton school start-up grants), and all applicable federal funds (especially Titles I, II, III, and Vb).
- The budget reflects all necessary outlays outlined in the Education Plan, including personnel, technological resources, facilities, curricular resources, and mission-specific expenditures, e.g. costs of monthly field trips.
- If applicable, strategies for fundraising are practical and flexible, and allow the school to adjust if the projected income does not materialize.
- There are strong financial management and oversight procedures, including assurances that local DC funds will be used exclusively for the DC program and its students.
- The application describes the insurance and audit services that the school will secure, or the process for securing them.
- If a facility has been identified, it is expected to meet the needs of the education program and there are effective measures to ensure the health and safety of students. If no facility has been identified, the facilities plan details the plan and timeline for securing a facility before year one, and fully describes the criteria for evaluating facilities, including alignment with the Education Plan; facilities options; key support, e.g. Building Hope, banks; and financing requirements.
- The facilities financing plan is based on realistic market expectations and includes contingencies in the case that the preferred financing method is unavailable.
- The applicant has established protocols to ensure strong financial performance, compliance with GAAP and major federal fund requirements, and no material events that can affect the school's future health.
- The experienced operator has described processes to ensure that all local and federal public funding allocated to the DC public charter school will be used exclusively for operating the DC school.

- The financial relationship between the ESP and the school, if applicable, are clearly separable. Shared employees or other shared costs between the charter school and any other organization are kept to a minimum and, when present, are based on transparent cost-sharing criteria.
- Describe how the recruitment plan is similar to and different from plans enacted at the operator's similar existing school(s). Provide data regarding the operator's past marketing effectiveness. What challenges do you foresee in adjusting to the DC market?

D. Operations Plan

1. Student Policies and Procedures

[See D.C. Code §§ 38-1802.02(10); 38-1802.06]

a. Policies and Procedures for Enrollment and Withdrawal of Students

- Indicate whether the school will join My School DC (www.myschooldc.org), the common application lottery and your rationale. If the school is not joining the common lottery, include your anticipated application release date, due date and enrollment date, along with policies for building wait lists.
- Describe your policies and procedures for enrollment and withdrawal of students, including verification of District residency and establishing a waitlist and or wait pool.
- Explain your policy for accepting students mid-year if space becomes available.
- Identify the grade levels in which you will accept new students. If you are limiting enrollment to certain grades, explain your reason for this and how you will accommodate for annual attrition.

b. Students with Disabilities

- Describe how the proposed school will identify students with disabilities.
- Describe how the proposed school will comply with the IDEA and Section 504 by providing a Free and Appropriate Public Education to students with disabilities.
- Identify the data you will use when determining the least restrictive environment (LRE) for students with disabilities along the continuum of services.
- Describe the proposed school's plan for providing a continuum of services for students requiring special education services. See 20 U.S.C. § 1412(a)(5); 34 C.F.R. § 300.115.
- Describe how students requiring Section 504 plans will be identified and served.
- Describe how you will establish a preliminary Child Find system, including a three-tiered academic Response to Intervention strategies, to identify students suspected of having a disability.
- How are these strategies similar to or different from the strategies in place in your existing school(s) in other states? What changes, if any, did you make to your disability identification or academic support procedures and what do you anticipate will be challenges with implementing these standards in DC?

c. English Language Learners

- Describe how English language learners will be identified.
- Describe how the proposed school will ensure effective communication with families who are not English speakers.

2. *Human Resource Information*

[See D.C. Code §§ 38-1802.02 (12), (18); 38- 1802.07]

a. Qualifications of Key Leadership and School Staff

- Provide the job descriptions and selection criteria for each key member of the school leadership, including administrators and other mission-critical staff, e.g. Chief Academic Officer. How do the job descriptions and hiring practices support the school in fulfilling its goals and mission?
- For any staff members who have already been selected for the positions identified for the proposed school, who are not part of the founding group, provide résumés and the staff members' responsibilities during the planning year. As necessary, refer to information presented earlier about founding group members whose qualifications were described in Section C.1.a. Profile of the Founding Group.
- Provide generic job descriptions for academic staff, e.g. teachers, and mission-critical, non-academic support staff, e.g. counselor, computer technician. For schools offering non-traditional programs (e.g. alternative education, residential, virtual/blended/flipped), include job descriptions for staff for non-traditional programming.
- If permanent selections for leadership roles have not yet been made, indicate the names and supply the resumes of the individuals who are providing leadership. Describe plans to recruit individuals to fill these key leadership roles permanently.
- Describe the steps you will take to build a pipeline of quality teachers and leaders for your school, and how the existing school(s) will contribute to developing the human capital at the DC school.

b. Staffing Plan

- Describe how the school will compete with other schools in the recruitment of teachers.
- Provide information about the anticipated number of staff members, their positions, specifying those who will serve students with disabilities and English language learners, and the pupil-teacher ratio.
- Explain how staff will be organized to accomplish the school's mission and goals.
- Describe plans for teacher retention.
- If applicable, describe any planned approaches to human resources (whether recruiting, training, staff roles, etc.) that you consider a unique feature or particular strength of your application.

c. Employment Policies

- Describe policies regarding salaries, contracts, hiring and dismissal, evaluation of staff, benefit plans (including pensions), and other matters related to staffing.
- Describe how salaries and benefit plans will be competitive with the surrounding market to attract the quality of staff desired.
- Describe policies on equal employment opportunities and maintenance of a drug-free workplace. If these policies are not yet in place, provide a timeline of when they will be developed.

- Describe how the existing or proposed policies will assure that the rights and benefits of current employees of the District of Columbia Public Schools will be protected if they accept employment at the proposed public charter school, as required by the SRA.

3. *Implementation of the Charter*

[See D.C. Code §§ 38-1802.02 (6), (15); 38-1802.04(c)]

- a. Maintenance and Reporting of Academic and Non-Academic Performance Data
 - Discuss how the proposed technology infrastructure will support the maintenance and transmittal of academic and non-academic performance data to PCSB, OSSE, and the Department of Education.
 - Identify the person(s) and/or title(s) of those who will be responsible for collecting, maintaining and reporting data to stakeholders.
- b. Major Contracts Planned
 - Describe all major contracts planned, with a value equal to or exceeding \$25,000, for equipment, education and other services, leases, improvements, purchases of real property or insurance. Provide the name(s) of prospective contractors, if known.
 - Describe how the proposed school will comply with the contract procurement requirements of the D.C. Code § 38-1802.04(c).

Note: No applicant will be approved without a timeline that demonstrates adequate plans for procuring needed services, such as identification and renovation of a facility, food services, lease and textbooks. See D.C. Code §§ 38-1802.02(6)(c), 38-1802.04(c)(1).

- c. Services Sought from the District of Columbia Public Schools
 - List and describe the nature and extent of any services to be sought from the DC Public Schools. These might include such things as special education services, transportation or food services.
- d. Non-Profit Status
 - Describe the applicant's progress and plan for becoming a DC nonprofit corporation.
- e. Technology Plan
 - Describe all significant technological equipment and services that will be required to implement the curriculum.
 - Specify any equipment or technological support that students and families will be responsible for obtaining, and any equipment or technological support that the charter school will provide.
 - Describe the charter school's Acceptable Use policy, which establishes rules about how the proposed school's network, computers, and other technology may be used.
 - Specify data protection and recovery procedures in the event of a catastrophic system failure.

Standard for Approval

Applications will generally be considered having met the standard for section D when the Operations Plan is designed to ensure a successful opening. The enrollment and withdrawal policies comply with the School Reform Act and procedures are transparent and easy for staff and families to understand and

follow. Plans for meeting the needs of students with disabilities and English language learners are aligned with best practices. The staffing plan, including administrative and teaching staff, is designed to ensure that the school fulfills its mission and goals. The technology plan is aligned with the school's mission and philosophy and is designed to ensure that students have adequate access to the technology necessary for academic success. The applicant is organized as a nonprofit organization under DC law or has a plan in place to become one.

Fundamental Characteristics

- If not participating in My School DC, the school has both a convincing justification for not participating and a well-developed strategy for managing its application process, open enrollment season, and lottery.
- The process for identifying and serving students with disabilities complies with IDEA and Section 504, the education mission and philosophy, and incorporates established best practices.
- The school leadership positions include necessary qualifications and time allocations, and are reasonable for school design. The applicant explains which key positions will be filled by local and national staff.
- The staffing plan, including required qualifications, recruitment strategies, staffing levels, and teacher retention and professional development, aligns and supports the proposed school's education mission and philosophy, is designed to support the proposed school's goals and academic achievement expectations, and is accurately reflected in the budget. It also specifies whether and which employees will be contracted or at-will.
- There is a well-developed plan for capturing, cleaning, analyzing, and reporting critical academic and non-academic data to support school improvement decisions and to fulfill PCSB's reporting requirements, including annual reporting on the school's achievement of its goals.
- The application lists the necessary major contracts, i.e., contracts with an aggregate value equal to or exceeding \$25,000, and the founding group's plans and expectations for securing those contracts.
- The school is organized as a District of Columbia nonprofit corporation.

Note: No school will receive **full** approval until it provides copies of bylaws and incorporation documents that demonstrate the school's nonprofit status under the District of Columbia Nonprofit Corporation Act. A school may receive conditional approval if it begun the nonprofit incorporation process; full approval will be conditional upon nonprofit incorporation.

E. Budget and Finance

1. Pre-Opening Budget

A public charter school is likely to incur considerable costs before it receives its first payment from the per-pupil allocation, usually in the July preceding its opening year. Provide a budget projection that includes revenues and expenses related to anticipated early planning and implementation costs that are expected to be incurred between the time a charter is awarded and July 1 of the start-up year, and which are not likely to be covered by the school's first-year operating budget. Also, provide a cash flow projection for this period.

2. Two-Year Operating Budget

Using the form available in Appendix A, prepare and submit a Two-Year Operating Budget (using a fiscal year of July 1 to June 30) that includes sources of revenue, both public and private, and planned expenditures.

If the Two-Year and Five-Year Operating Budget Projections include revenues from non-formula grants, donations, and/or activity fees (such as before-and after-school care) that amount to 10 percent or more of total revenues, submit two- and five-year budget projections that show how the school would continue to operate and meet its objectives using only the funds provided by the per-pupil allocation and formula grants.

In addition to the other expenditures associated with operating the public charter school, the applicant must include in its operating budget an Administrative Fee of one-half ¹⁶of one percent of the annual budget of the school, payable to the District of Columbia Public Charter School Board to cover the costs associated with the performance of its administrative responsibilities.

3. Estimated Five-Year Budget Projections

Using the form available in Appendix B prepare and submit five-year estimates of the public charter school budget. These projections are needed in order to ensure that a school can cover its estimated fixed and variable costs with its expected per-pupil funding.

4. Capital Budget

In addition to including capital costs in the Two-Year Operating Budget Projection, provide a capital budget.

5. Cash Flow Projection for Year One

Using the form available in Appendix A, provide a monthly cash flow projection for the period from July 1 through June 30 of Budget Year One.

6. Financial Audits, including A-133, for the Last Three Years

If available, submit audits for the experienced operator as a whole. If the audits for existing schools

¹⁶ Pending legislation increases this fee to one percent. PCSB expects this legislation to pass by the fall of 2014.

are not consolidated, submit audits for each of the existing schools operated by the experienced operator.

7. *Annual Reports for the Last Two Years*

If available, submit annual reports for the experienced operator as a whole. If the annual reports for existing schools are not consolidated, submit audits for each of the existing schools operated by the experienced operator.

8. *IRS Form 990 for the Last Three Years*

If available, submit Forms 990 for the experienced operator as a whole. If the annual reports for existing schools are not consolidated, submit Forms 990 for each of the existing schools operated by the experienced operator.

F. Board of Trustees Supporting Documents

For each founding member of the Board of Trustees, submit **in this order**:

- One complete résumé;
- One résumé with all personal contact information, i.e. address, phone number, and email, redacted or removed;
- Board Member Agreements;
- Signed Conflict of Interest form (available on page 59); and
- A signed personal statement that describes their interest in the proposed charter school, their role in the development of the application, their role should a charter be granted, and the expertise and resources that they will bring in establishing the proposed charter school.

Conflict of Interest Form

Instructions: Check “yes or no” to each question in the table below. If you answer “yes” to any of the following questions, provide an explanation on a separate sheet of paper, labeling explanations with the number of the corresponding question.

Questions	Yes	No
1 Do or will you, your spouse, or any member of your immediate family have any contractual agreements with the proposed charter school?		
2 Do you, your spouse, or any member of your immediate family have any ownership interest in any education service provider (ESP) or any other company contracting with the proposed charter school?		
3 Did or will you, your spouse, or any member of your immediate family lease or sell property to the proposed charter school?		
4 Did or will you, your spouse, or any member of your immediate family sell any supplies, materials, equipment or other personal property to the proposed charter school?		
5 Have you, your spouse, or any member of your immediate family guaranteed any loans for the proposed charter school or loaned it any money?		
6 Are or will you, your spouse, or any member of your immediate family be employed by the proposed charter school, its ESP or other contractors?		
7 Did you or your spouse provide any start-up funds to the proposed charter school?		
8 Did or do you or your spouse, or other member of your immediate family, have ownership interest, directly or indirectly, in any corporation, partnership, association or other legal entity that would answer “yes” to any of the questions 1-7?		
9 Does any other board, group or corporation believe it has a right to control or have input on votes you will cast as a founding member or member of the Board of Trustees?		
10 Do you currently serve as a member of the board of any public charter school?		
11 Do you currently serve as a public official?		
12 Have you, your spouse, or any member of your immediate family applied to establish or participated in the establishment of a charter school?		
13 To the best of your knowledge, are there situations not described above that may give the appearance of a conflict of interest between you and the proposed charter school, or which would make it difficult for your to discharge your duties or exercise your judgment independently on behalf of the proposed charter school?		

Signature	
Name (Printed)	Title
Name of Proposed School	Date

G. Additional Required Documents

1. *Articles of Incorporation*

2. *Bylaws*

By-laws must include the clause to address mandatory dissolution in D.C. Code § 38-1802.13a(c)(1).

3. *Board Member Agreements*

4. *Board of Trustees Performance Expectations*

5. *Code of Ethics*

6. *Conversion Endorsement Certification, if applicable)*

7. *Discipline Policy*

8. *Letter of Intent for Facility (if applicable)*

9. *Management Agreement and Related Documents (if applicable)*

- If applicable, include the organizational chart showing the relationship among all business entities being operated by or affiliated with the experienced operator.

10. Assurances Form

As the authorized representative of the applicant, I acknowledge the obligation of the proposed public charter school to comply with the following:

1. Maintain non-profit status under terms stated in the District of Columbia Non-profit Corporation Act prior to receiving a charter. (D.C. Code § 38-1802.04(c)(16).)
2. Seek, obtain, and maintain accreditation for the public charter school from at least one of the accrediting bodies listed in Part B of the District of Columbia School Reform Act or a body otherwise approved by the DC Public Charter School Board. (D.C. Code § 38-1802.02(16).)
3. Remain nonsectarian and not be affiliated with a sectarian school or religious institution. (D.C. Code § 38-1802.04 (c)(15).)
4. Submit an annual audit of financial statements according to Government Auditing Standards, by a Certified Public Accountant listed in the Approved Auditor List for charter schools. (D.C. Code § 38-1802.04(c)(11)(B)(ix).)
5. Offer open enrollment to all students who are residents of the District of Columbia, and use a random selection process when the school receives more applications from students of the District of Columbia than there are spaces available. (D.C. Code § 38-1802.06.)
6. Provide PCSB with student enrollment data required for submission to the Office of the Chief Financial Officer. (D.C. Code § 38-1802.04 (c)(12),)
7. Collect, record, and report attendance, discipline, and enrollment data in compliance with the policies and procedures of PCSB, using the reporting software required by PCSB. (D.C. Code § 38-1802.11(a)(2).)
8. Collect and report academic and non-academic performance consistent with PCSB's data submission policies.
9. Not charge tuition, fees, or other mandatory payments for attendance at the public charter school or for participation in its programs, except to Non-Resident Students or for field trips or similar activities. (D.C. Code § 38-1802.04 (c)(2).)
10. Establish an informal complaint resolution process prior to the first date that the school accepts applications. (D.C. Code § 38-1802.04 (c)(13).)
11. Ensure that all relevant school personnel and Board of Trustee members are capable of executing financial management, governance and management, and other responsibilities as deemed necessary by PCSB. (D.C. Code § 38-1802.02(15).)
12. Provide PCSB access to and the right to examine all records or documents related to the award, as well as any documents and records, including audit findings, needed to determine the performance of the school under the terms of its charter. (D.C. Code § 38-1802.11(a)(2).)

13. Comply with the contract procurement requirements of the D.C. Code § 38-1802.04(c).
14. Comply with the following federal and local laws:
- a. **Health and Safety:** Healthy Schools Act of 2010 (D.C. Code §§ 38-821.01 *et seq.*); federal and local laws regarding background checks for all employees and volunteers working with children and referring students to the Child and Family Services Agency for instances of education neglect and suspected abuse;
 - b. **Building Safety:** D.C. Building and Fire Codes (D.C. Code § 5-501 *et seq.*);
 - c. **Maintenance and Dissemination of Student Records:** Family Education Rights and Privacy Act (20 U.S.C. § 1232g);
 - d. **Certain Requirements of Education Institutions:** Compulsory School Attendance (D.C. Code § 38-201 *et seq.*); Immunization of School Students (D.C. Code § 38-501 *et seq.*); Tuition of Nonresidents (D.C. Code § 31-301 *et seq.*); Non-Profit Corporations (D.C. Code § 29-401 *et seq.*);
 - e. **Students with Disabilities:** Subchapter B of the Individuals with Disabilities Education Act (20 U.S.C. § 1411 *et seq.*) and Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. § 794); any and all federal and local laws around providing a free and appropriate public education to all students with disabilities;
 - f. **English Language Learners:** all federal and local laws and applicable regulations regarding identifying and serving students who are English language learners;
 - g. Title I of the Elementary and Secondary Education Act;
 - h. **Civil Rights Statutes and Regulations of the Federal Government and the District of Columbia:** The Age Discrimination Act of 1975 (42 U.S.C. § 6101 *et seq.*); Title VI of the Civil Rights Act of 1964 (42 U.S.C. §§ 2000d *et seq.*); Title IX of the Education Amendments of 1972 (20 U.S.C. §§ 1681 *et seq.*); and the Americans with Disabilities Act of 1990 (42 U.S.C. §§ 12101 *et seq.*); and
 - i. **Other:** All other laws deemed applicable by PCSB (D.C. Code § 38-1802.11(a)(1)(B)).

Signature of Authorized Certifying Official	
Name (Printed)	Title
Name of Proposed School	Date

H. Course Curriculum

For Full Charter Approval: A completed school curriculum must include year-long curriculum maps for each subject area described in the Education Plan, inclusive of standards, instructional methods, resources, and formative assessments, along with an example unit plan for each. Include a curriculum map for one grade per grade span the school plans to operate (early childhood, elementary, middle, and/or high school, or adult education).

The sample unit plan should include:

- Unit objectives
- Standards broken down by unit
- Formative assessments tied to that unit's objectives
- Instructional materials, including print resources, online programs, and computer software
- Instructional strategies

For Approval with Conditions: Include a sample course curriculum for one core academic subject for one grade level and the timeline for developing a complete curriculum in the planning year; include due dates for curriculum maps, unit plans, and lesson plans.

Note for High School Applicants only: Include a four-year scope and sequence to ensure that all 9th graders will be on-track to graduate high school in four years with enough credits to enter competitive four-year colleges.

Note: Applicants may redact parts or the whole of Section H if they believe that these portions contain information that will cause substantial harm to the applicant's competitive position if released publicly.

Appendix A: Forms

Declaration of Intent to Apply Form

To submit your declaration of intent to apply, please click here:

https://docs.google.com/forms/d/1Hy7_slsHi4YpXXLAP6_M8YAQ_bwa_V-kSh5PRur7qDM/viewform?usp=send_form

Sample Demographic Analysis Tables

Applicants are encouraged to use these tables in the Demographic Analysis component of the application (Section A.2.) For an editable version of these tables, please click here:

<https://docs.google.com/file/d/0B1jXQpCEXCTZdi1JbFZoelp0VzQ/edit>

Projected Student Demographics:

Race/Ethnicity					Special Education ¹⁷				English Language Learners	Low Income
Black	Hispanic / Latino	White	Asian	Other	Level 1	Level 2	Level 3	Level 4		

Similar Schools:

Similar School 1	(Name)			
Ward & Neighborhood Cluster	School Type	Total Enrollment	Low-Income	
	(DCPS / PCS / Independent)		%	
Black	Hispanic / Latino	White	Asian	Other
%	%	%	%	%
Special Education				English Language Learners
Level 1	Level 2	Level 3	Level 4	
%	%	%	%	%
Proficiency on State Assessment	Growth on State Assessment			
%				

Provide a school profile for between three and five similar schools. These data can be found online at the following sites:

¹⁷ Level 1: 8 hours or less per week of specialized services
 Level 2: More than 8 but less than or equal to 16 hours per week of specialized services
 Level 3: More than 16 but less than or equal to 24 hours per week of specialized services
 Level 4: 24+ hours per week of specialized services

- <http://www.learndc.org/>
- <http://dashboard.dcpcsb.org/>
- <http://focusdc.org/data>

Pre-Opening (Planning Year) Budget Worksheet

Click here to download an editable version of the Pre-Opening Budget Worksheet:

<https://www.dropbox.com/s/14wivewmzi7807g/Charter%20Application%20-%20Pre-Opening%20Budget%20Worksheet.xls>

Two-Year Operating Budget Worksheet

Click here to download an editable version of the Two-Year Operating Budget Worksheet:

<https://www.dropbox.com/s/811c2iceisxjarf/Charter%20Application%20-%202%20Year%20Operating%20Budget.xls>

Five -Year Estimated Budget Worksheet

Click here to download an editable version of the Five-Year Estimated Budget Worksheet:

<https://www.dropbox.com/s/klubu8srg79j8au/Charter%20Application%20-%205%20Year%20Estimated%20Budget%20Worksheet.xls>

Monthly Cash Flow Worksheet

Click here to download an editable version of the Monthly Cash Flow Worksheet:

<https://www.dropbox.com/s/wjqu2jm6mjanws8/Charter%20Application%20-%20Monthly%20Cash%20Flow%20Worksheet.xls>

Appendix B: Application Checklist

2014-15 Experienced Operator Charter School Application Acceptance Process

Proposed School Name: [Click here to enter text.](#)

Submitted By: [Click here to enter text.](#)

Telephone number: [Click here to enter text.](#)

Email Address: [Click here to enter text.](#)

Name of Experienced Operator: [Click here to enter text.](#)

(1) Verify Completeness of Unredacted Electronic Submission

Application Contents	Yes	No
Applicant Information Sheet	<input type="checkbox"/>	<input type="checkbox"/>
Executive Summary*	<input type="checkbox"/>	<input type="checkbox"/>
Establishing the Need*	<input type="checkbox"/>	<input type="checkbox"/>
Education Plan*	<input type="checkbox"/>	<input type="checkbox"/>
Business Plan*	<input type="checkbox"/>	<input type="checkbox"/>
Operations Plan*	<input type="checkbox"/>	<input type="checkbox"/>
Budget and Finance	<input type="checkbox"/>	<input type="checkbox"/>
Budget Narrative	<input type="checkbox"/>	<input type="checkbox"/>
Pre-Opening Budget	<input type="checkbox"/>	<input type="checkbox"/>
Two-Year Operating Budget	<input type="checkbox"/>	<input type="checkbox"/>
Estimated Five-Year Budget	<input type="checkbox"/>	<input type="checkbox"/>
Capital Budget	<input type="checkbox"/>	<input type="checkbox"/>
Cash Flow for Year One	<input type="checkbox"/>	<input type="checkbox"/>
Board of Trustees Supporting Documents (for each Board member)	<input type="checkbox"/>	<input type="checkbox"/>
Résumé	<input type="checkbox"/>	<input type="checkbox"/>
Board Member Agreements	<input type="checkbox"/>	<input type="checkbox"/>
Statements of Interest and Qualifications	<input type="checkbox"/>	<input type="checkbox"/>
Conflict of Interest Form	<input type="checkbox"/>	<input type="checkbox"/>
Required Documents	<input type="checkbox"/>	<input type="checkbox"/>
Articles of Incorporation	<input type="checkbox"/>	<input type="checkbox"/>
Bylaws	<input type="checkbox"/>	<input type="checkbox"/>
Board of Trustees Performance Expectations	<input type="checkbox"/>	<input type="checkbox"/>
Code of Ethics	<input type="checkbox"/>	<input type="checkbox"/>
Conversion Endorsement Certification (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Discipline Policy	<input type="checkbox"/>	<input type="checkbox"/>
Letter of Intent for Facility (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>

Education Plan*	<input type="checkbox"/>	<input type="checkbox"/>
Business Plan*	<input type="checkbox"/>	<input type="checkbox"/>
Operations Plan*	<input type="checkbox"/>	<input type="checkbox"/>
Budget and Finance	<input type="checkbox"/>	<input type="checkbox"/>
Budget Narrative	<input type="checkbox"/>	<input type="checkbox"/>
Pre-Opening Budget	<input type="checkbox"/>	<input type="checkbox"/>
Two-Year Operating Budget	<input type="checkbox"/>	<input type="checkbox"/>
Estimated Five-Year Budget	<input type="checkbox"/>	<input type="checkbox"/>
Capital Budget	<input type="checkbox"/>	<input type="checkbox"/>
Cash Flow for Year One	<input type="checkbox"/>	<input type="checkbox"/>
Board of Trustees Supporting Documents (for each Board member)	<input type="checkbox"/>	<input type="checkbox"/>
Résumé	<input type="checkbox"/>	<input type="checkbox"/>
Board Member Agreements	<input type="checkbox"/>	<input type="checkbox"/>
Statements of Interest and Qualifications	<input type="checkbox"/>	<input type="checkbox"/>
Conflict of Interest Form	<input type="checkbox"/>	<input type="checkbox"/>
Required Documents	<input type="checkbox"/>	<input type="checkbox"/>
Articles of Incorporation	<input type="checkbox"/>	<input type="checkbox"/>
Bylaws	<input type="checkbox"/>	<input type="checkbox"/>
Board of Trustees Performance Expectations	<input type="checkbox"/>	<input type="checkbox"/>
Code of Ethics	<input type="checkbox"/>	<input type="checkbox"/>
Conversion Endorsement Certification (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Discipline Policy	<input type="checkbox"/>	<input type="checkbox"/>
Letter of Intent for Facility (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Management Agreement and Related Documents (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Assurances Form	<input type="checkbox"/>	<input type="checkbox"/>
Curriculum ¹⁹	<input type="checkbox"/>	<input type="checkbox"/>
Full Curriculum or Curriculum Sample with Timeline for Development	<input type="checkbox"/>	<input type="checkbox"/>
Scope and Sequence (High Schools Only)	<input type="checkbox"/>	<input type="checkbox"/>

(4) Accept Supporting Materials

In-person Submission

Supporting Materials	Yes	No
Five bound double-sided copies of the application with a table of contents, all pages numbered, and labeled tabs separating each section and appendices	<input type="checkbox"/>	<input type="checkbox"/>
One complete electronic, searchable/OCR PDF of the entire application, including the budget	<input type="checkbox"/>	<input type="checkbox"/>

¹⁹ If the applicant has a completed curriculum, this should include a link(s) to the curriculum maps, unit plans, and an example lesson plan for each subject area and grade level. If Section G includes proprietary curricular materials, applicants may choose to redact parts or the whole of the curriculum from the redacted electronic version of the application.

