



2021 Charter Application Guidelines

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

Revised July 2020

District of Columbia Public Charter School Board
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District of Columbia Public Charter School Board (DC PCSB)

DC 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.

DC 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.

For information about the DC PCSB Board, visit <http://www.dcpsb.org/public-charter-school-board>.

[NS] Applies only to new schools.

[EO] Applies only to experienced operators.

[SMO] Applies to all schools planning to contract with a school management organization.

Table of Contents

FREQUENTLY ASKED QUESTIONS & DEFINED TERMS	4
HELPFUL RESOURCES	8
APPLICATION INSTRUCTIONS	10
1. Types of Applicants	10
2. Components of the Application Review Process	10
3. Application Timeline	12
4. Submitting an Application	12
5. Standard for Approval	15
APPLICATION CONTENTS	18
APPLICANT INFORMATION SHEET	20
EXECUTIVE SUMMARY	23
SECTION A: ESTABLISHING THE NEED	24
1. Mission and Philosophy	24
2. Evaluating the Landscape	26
3. Recruitment and Retention	27
4. Community Input	28
SECTION B: EDUCATION PLAN	29
1. Curriculum	29
2. Support for Learning	34
3. [SMO] Historical Academic Performance	38
4. Charter Goals and Student Academic Achievement Expectations	40
SECTION C: MANAGEMENT PLAN	43
1. Founding and Leadership	43
2. Staffing Plan	46
3. Management and Internal Oversight	49
4. [SMO] School Management Organization	52
5. Student Policies and Procedures	56
SECTION D: FINANCE PLAN	59
1. Facilities	59
2. Finance	60
3. Budget Workbook	62
SECTION E: FOUNDING GROUP SUPPORTING DOCUMENTS	64
SECTION F: ADDITIONAL REQUIRED DOCUMENTS	66
SECTION G: CURRICULUM SAMPLE	70
APPENDIX A: FORMS	71
APPENDIX B: APPLICATION CHECKLIST	74
APPENDIX C: STANDARD CONDITIONS OF APPROVAL	78

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Frequently Asked Questions & 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. Each school should create its own board member agreement template, which will be signed by each Board Member.

Charter goals are the specific, measurable goals schools will be held accountable to in annual and high-stakes reviews of the school's performance. Each school has the autonomy to craft its own goals, and must report on its progress towards achieving these goals on an annual basis. DC PCSB is required by law to do an in-depth review of each school's progress towards achieving its goals at least once every five years.

Conversion schools are existing public or private schools that the founding group applies to convert to a public charter school. To convert an existing school to a public charter school, the founding group must comply with the notification and endorsement requirements of D.C. Code § 38-1802.01.

Curriculum is the combination of standards, resources/instructional materials, methods of instruction, and formative assessments.

English learner (EL) refers to a student in pre-K through grade 12 programs that culminate in a regular high school diploma as well as those who are on pathways in adult-serving schools that culminate in a regular high school diploma. As described in the Elementary and Secondary Education Act, the term "English learner" means an individual:

- A. who is age 3 through 21;
- B. who is enrolled or preparing to enroll in an elementary school or secondary school;
- C. (i) who was not born in the United States or whose native language is a language other than English;
(ii)(a) who is a Native American or Alaska Native, or a native resident of outlying areas;
and
(b) who comes from an environment where a language other than English has had a significant impact on the individual's level of English language proficiency; or
(iii) Who is migratory, whose native language is a language other than English, and who comes from an environment where a language other than English is dominant;
and
- D. whose difficulties speaking, reading, writing, or understanding the English language may be sufficient to deny the individual –
(i) the ability to meet the challenging state academic standards;
(ii) the ability to achieve successfully in classrooms where the language of instruction is English; or
(iii) the opportunity to participate fully in society

English learners in adult-serving schools who are on non-traditional pathways which do not culminate in a regular high school diploma, are defined in accordance with § 38–2901 of the DC Code as adults who have limited ability in speaking, reading, writing, or

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understanding the English language and whose native language is a language other than English. See page 11 for information on requirements for this type of program.

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

The **Public Charter School Fiscal Transparency Amendment Act of 2015** (the Fiscal Transparency Act), amended the School Reform Act (defined below) to define and set reporting obligations for conflicting interest transactions for public charter schools, and set certain requirements for contracts between public charter schools and school management organizations (defined below).

Founding group, also referred to as the **applicant group**, is the group of individuals; a private or public entity; an institution of higher education; or an experienced operator (defined below) that seeks to establish a public charter school in the District of Columbia. Often several members of the founding group transition to the governing board, which is the school's governing body, before and during the first year of academic operation, and others may transition to the key personnel, the initial administrative team running the school in its first year of operation and beyond.

Grade band refers to groupings of grades that are somewhat flexible based on the school program, but commonly understood. Early childhood generally refers to pre-kindergarten through second grade; elementary school generally refers to kindergarten through fourth grade and may include pre-kindergarten and fifth grade as well; middle school generally refers to fifth or sixth through eighth grade; high school refers to ninth through twelfth grade; and adult refers to post-secondary programs, including those serving students who do not have high school diplomas.

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 disabilities. It was originally enacted in 1975 and is currently codified at Title 20, Chapter 33, Section 1400 of the United States Code.

A **Local Education Agency (LEA)** is an entity which operates public schools, either traditional or public charter. Each DC public charter LEA is incorporated as a DC non-profit organization.

My School DC is DC's citywide enrollment lottery. District of Columbia Public Schools (DCPS) 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 or guardian, for the purposes of these Guidelines, 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.

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The Rehabilitation Act prohibits discrimination on the basis of disability in programs conducted by federal agencies, in programs receiving federal financial assistance, in federal employment, and in the employment practices of federal contractors. **Section 504** of the Rehabilitation Act defines the rights of individuals with disabilities to participate in, and have access to, program benefits and services.

School management organization (SMO) means an entity that a public charter school identifies in its charter petition or petition for charter revision with which the public charter school contracts to provide management or oversight services regarding the school's expenditures, administration, personnel, or instructional methods. The term "school management organization" does not include an entity with which a public charter school contracts solely to provide administrative support services, such as:

(A) Payroll processing or information technology services;

(B) Academic support services; or

(C) Temporary management services recommended by the eligible chartering authority to improve the performance of a public charter school.

Non-profit school management organizations may apply for a charter as an **experienced operator**, whereas for-profit school management organizations may be retained by the Board of a non-profit charter school but are not eligible to apply for a charter. Both are considered school management organizations.

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://dccode.org/simple/Title-38/Chapter-18/>.

School Quality Reports (also known as the **Performance Management Framework** or **PMF**) are DC PCSB's accountability tool for evaluating and publicly reporting school academic performance for all public charter schools. For more information about School Quality Reports, see <http://www.dcpccb.org/performance-management-framework-pmf>.

State assessments refer to annual academic assessments administered by the District of Columbia to provide coherent information about student attainment of state standards across grades and subjects, as required by the Elementary and Secondary Education Act. Since school year 2015-16, DC has used the Partnership for Assessment of Readiness for College and Careers (PARCC) as the state assessment system for English language arts and mathematics.

Student academic achievement expectations are the academic learning level that all students are expected to reach while attending the school. They are measured using nationally recognized summative assessments or state assessments, such as PARCC, and are disaggregated by student population, such as race, ethnicity, gender, grade, disability, and English learners.

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.

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

The **Uniform Per Student Funding Formula (UPSFF)** is the formula used to determine each DC public school's annual, local funding amount. Each fiscal year, UPSFF funding is allotted based on how many students each public charter school enrolls by "count day" each year, typically October 5. For each student, the school receives a foundational amount of approximately \$9,700 multiplied by certain factors depending on each student's grade range and certain need categories (special education, English Learner, and at-risk), as well as approximately \$3,100 in additional funding to support facilities expenses.

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Helpful Resources

Prospective applicants are encouraged to explore the following resources as they plan their school program. This list is not meant to be exhaustive and applicants are encouraged to reach out to DC PCSB staff, existing schools, charter school/education support organizations, community organizations, and other organizations or individuals.

DC School Reform Act: <http://dccode.org/simple/Title-38/Chapter-18/>

Charter Applications Archive: <http://www.dcpsb.org/report/charter-applications-archive>

Local Charter School Support Organizations¹

- Building Hope: <http://www.buildinghope.org/>
- Charter Board Partners: <https://charterboards.org/>
- DC Special Education Cooperative: <http://specialedcoop.org/>
- EdOps: <http://www.ed-ops.com/>
- DC Charter School Alliance: <https://www.dccharters.org/>

Data: Student Achievement, Enrollment, Demographics, Attendance, Discipline

- DC PCSB's Performance Management Framework: <http://www.dcpsb.org/performance-management-framework-pmf>
- LearnDC.org: <http://learndc.org/>
- DC PCSB's Data Portal: <https://data.dcpsb.org/>
- DC School Report Card: <https://dcschoolreportcard.org>

Special Education Requirements

- OSSE Specialized Education policies and regulations: <http://osse.dc.gov/service/specialized-education-policies-and-regulations>
- Special Education Funding and Maintenance of Effort reporting: <https://osse.dc.gov/node/357>
- Department of Education information on Section 504 of the Rehabilitation Act: <http://www2.ed.gov/about/offices/list/ocr/504faq.html>

English Learner Resources

- [OSSE Delivering Education Services to English Learners:](https://osse.dc.gov/publication/delivering-education-services-english-learners-policies-and-procedures-administrators) <https://osse.dc.gov/publication/delivering-education-services-english-learners-policies-and-procedures-administrators>
- Department of Education English Learner Toolkit: <https://www2.ed.gov/about/offices/list/oela/english-learner-toolkit/index.html?src=best-bet>

¹ DC PCSB does not endorse the services of these organizations.

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- DC Language Access for Education Amendment Act of 2017: <https://lims.dccouncil.us/Legislation/B22-0075>

Finances and Funding

- Individual school budgets, audits, and 990s: <http://www.dcpccb.org/report/school-budgets-fiscal-audits-and-990s>
- Financial and Audit Review Report: <http://www.dcpccb.org/report/school-finances>
- Alternative Program Funding: <https://osse.dc.gov/sites/default/files/dc/sites/osse/publication/attachments/Alternative%20Program%20Designation%20Guidance.pdf>
- Uniform Per Pupil Funding Formula: <https://dcpccb.org/financial-oversight>

DC PCSB Policies and Guidance

- DC PCSB policies: <https://dcpccb.org/dc-pccb-policies>
- DC Public Charter Schools Operations Manual: <https://focusdc.org/operations-manual>
- DC PCSB Guidance on Ensuring an LGBT-Inclusive Climate: <http://www.dcpccb.org/LGBTQinclusive>
- DC PCSB Guidance on Sanctuary Schools for Undocumented Students: <http://www.dcpccb.org/guidance-sanctuary-schools-undocumented-students>
- DC high school graduation requirements: <http://sboe.dc.gov/sites/default/files/dc/sites/sboe/publication/attachments/GradRequirements071813final.pdf>
- Principles and Standards for Management Contracts, per the National Association of Charter School Authorizers: http://www.qualitycharters.org/wp-content/uploads/2015/08/Principles-and-Standards_2015-Edition.pdf, page 24

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Application Instructions

1. Types of Applicants

Before beginning the application, applicants should determine their applicant type. DC PCSB generally categorizes applicants into one of three types:

- (1) **Experienced Operators:** Existing non-profit school management organizations or charter schools with a minimum of three years of high-quality, externally-validated performance data on a specific educational program. DC PCSB expects that experienced operators will largely be replicating the program established at the existing school(s) in other states, including the curriculum, with slight modifications for DC.
- (2) **School Management Organizations:** Founding groups that plan to contract with an existing non-profit or for-profit SMO for executive, academic, and/or administrative services. All experienced operators are expected (but not necessarily required) to contract with the operator's central office or administrative organization as a SMO.
- (3) **New Schools:** Founding groups that may have experience founding, leading, or teaching in existing schools, but are not seeking to replicate an existing school or program. Any applicants that do not qualify as Experienced Operators or School Management Organizations should apply as New Schools.

If you have any questions about this classification, please contact DC PCSB staff at applications@dcpcsb.org.

While all three types of applicants should use these guidelines in writing their application, some questions differ slightly for the three types of applicants. These guidelines will distinguish by labeling some elements as [NS] for new schools, [EO] for experienced operators, and [SMO] for school management organizations.

Any of these applicants may propose one of the following: (1) conversion of an existing DC public school into a public charter school; (2) conversion of an existing private or independent school into a public charter school; or (3) establishment of a new public charter school. Applicants proposing conversion of an existing school (public or private) should contact DC PCSB staff as soon as possible before submitting their application.

2. Components of the Application Review Process

DC PCSB evaluates each application based on the following four elements:

- (a) Written applications should be submitted according to these guidelines. Each written application, with redactions, is made available on DC PCSB's website for public access.
- (b) Site visits to the operator's existing school(s) will be scheduled for all eligible applicants after the written application is submitted. Eligible applicants include all experienced operators, as well as some new schools, particularly those contracting with a school management organizations or conversion schools.

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- (c) Capacity interviews are interviews conducted by DC PCSB staff. DC PCSB formulates unique questions based on the weak or confusing areas of the written application. Capacity interviews always include questions about the founding group's ability to execute the plan as written, supports for students with disabilities, teacher recruitment and retention, and demand for the proposed school. The interview may also include hypothetical situations to gauge how the founding team would respond to common challenges facing public charter schools in DC.

Applicants are invited to bring as many members of the founding group as they deem appropriate with the collective expertise to respond to questions about the proposed school's budget, operations, and instructional program. They should include people who will transition from the founding group to the school's board of trustees or staff leadership team. Applicants are strongly encouraged to bring their special education expert to the capacity interview. These interviews are transcribed and publicly available.

- (d) Public hearings are opportunities for the DC PCSB Board and the public to hear from the founding group. The applicant will have the opportunity to address the board and public with prepared comments no longer than five minutes. The DC PCSB Board will question the applicant group about its application, planning, or any other relevant topic. The Board may revisit questions from the capacity interview to give the applicant an opportunity to amend or clarify its original answer. Finally, the public will have the opportunity to give testimony about the application. Please note, there will only be space for three members of the founding group at the dais.

Based on these four elements and the Standard for Approval explained in these guidelines, the DC PCSB Board will vote on each charter application at a subsequent public meeting.

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3. Application Timeline

The application timelines are posted on DC PCSB's website:

<http://www.dcpsb.org/report/start-charter-school>

Applicants are encouraged to review the Application Intake Checklist on page 74 for more information on the intake process.

4. Submitting an Application

Each application cycle has two submission deadlines: an initial submission deadline, after which DC PCSB staff checks the application for completeness and gives the applicant an opportunity to incorporate any required components, and the final submission deadline, when the complete application must be submitted. **To be considered for a charter, applicants must meet both application deadlines and submit all information outlined in the Application Contents section of these guidelines (starting on page 15).**

Applications incomplete on the final application deadline will be rejected. Complete applications will be publicly available within 48 hours after the final submission deadline.

Initial Submission Deadline

To ensure applicants are prepared to submit complete applications by the final application deadline, applicants must submit the non-redacted version of their applications electronically by the initial application deadline. Applicants will receive confirmation from DC PCSB that their application is or is not complete within three hours of the initial submission deadline.

For incomplete applications, DC PCSB will specify which element(s) of the application are missing and the applicant will have to resubmit prior to the final submission deadline.

Applicants are invited to submit their electronic applications up to one week before the electronic application deadline to have DC PCSB check their application for completeness.

Usually charter applications are too large to be sent as email attachments. If you do choose to send your charter application as an attachment, please contact DC PCSB staff in a separate email or over the phone to ensure we received it. We recommend using Dropbox or another secure file sharing software.

To use Dropbox to submit your charter application, you must first have a (free) Dropbox account.

- Sign up for Dropbox here: <https://www.dropbox.com/>
- Add your charter application to Dropbox. <https://www.dropbox.com/en/help/90>
- Create a link to the file or folder containing your charter application: <https://www.dropbox.com/help/167>
- Send the link to DC PCSB via email at applications@dcpsb.org.

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Final Submission Deadline

By the final submission deadline, applicants must submit:

- (1) Printed copies of the written application, specifically: five bound, double-sided, printed copies of the application, in accordance with the Formatting Standards listed below;
- (2) A Microsoft Word (.doc or .docx) version of the application narrative, including: the Applicant Information Sheet, Table of Contents, and Sections A through D;
- (3) A PDF version of the written application, which must be searchable/OCR²; complete, including the application narrative and all attachments in a single PDF; and redacted, with contact information of founding group members (i.e., addresses, phone numbers, email addresses, etc.) and signatures removed; and
- (4) one file of the paper copies of all board member agreements with original signatures.

Electronic versions of the application may be submitted in person on a USB flash drive (which will not be returned to you) or electronically via a secure file sharing software. Please refer to the instructions above for how to submit your application electronically.

The aforementioned materials must be submitted to DC PCSB at 3333 14th Street, NW, Suite 210, Washington, DC 20010.

Please refer to **Appendix B: Application Checklist** on page 74 to review DC PCSB's application intake procedures. Applicants may be asked to submit additional materials to respond to DC PCSB questions raised during application review process.

Applicants wishing to request an extension or appeal the rejection of an application may email applications@dcpcsb.org within 12 hours of the deadline.

Optional: Remote Submission

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

² For more information on how to create searchable/OCR PDFs, please see the Frequently Asked Questions:

<http://bit.ly/lnGQqjB>

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

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

The signed paper copies of all board member agreements must be mailed separately, with original signatures, and received by the full application deadline.

Formatting Standards

- Text should be no smaller than 12-point font.
- The applicant's name and the page number must appear in a header or footer of every page.
- Neither printed nor electronic versions of applications may have watermarks.
- Printed copies must be double-sided.
- Printed copies must have labeled tabs separating each section.
- Only the following components of the written application must be printed: Cover, Table of Contents, Applicant Information Sheet, Executive Summary, Section A, Section B, Section C, and Section D. **Sections E and F should not be printed.**

Inclement Weather

In case of inclement weather, DC PCSB follows the Office of Personnel Management Operating Status: <http://www.opm.gov/policy-data-oversight/snow-dismissal-procedures/current-status/>.

- **Initial Application Deadline:** There will be **no change** to the submission dates if DC PCSB's offices are closed on the initial (electronic) submission deadline; applicants must still submit their non-redacted electronic application by the initial submission deadline.
- **Final Application Deadline:** There are changes to the submission process if DC PCSB's offices are closed on the deadline for submitting the final application. Applicants must submit fully completed electronic applications (both redacted and complete) remotely by the deadline; DC PCSB staff will respond within 24 hours with confirmation of the receipt of the application and further instructions for submitting the paper copies. Hard copies must be delivered by noon on the next day that DC PCSB offices are open.

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5. *Standard for Approval*

Based on information gathered during the application review process, explained on page 10, 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 and/or statutorily-required conditions are satisfied and the school receives Full Approval. For more information on the conditions common to most new charter schools, please see Appendix C on page 78.
- Denial: No further consideration of the application. Applicants whose applications are denied may address the application's shortcomings and reapply in a future cycle, though not in the same 12-month period. In some cases, the DC PCSB Board may encourage an applicant to reapply if they have a promising idea or team, but have not yet met the Standard for Approval.

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

- (1) Demonstrated need for the school: The applicant makes a compelling case for why the school fills an unmet need in the Washington, DC, educational landscape.
- (2) Sufficient progress in developing the plan: The applicant group has made significant progress in designing a high quality school or in planning the replication of their existing school(s), and realistically assesses the challenges they will face in opening and operating the school, clearly describing how they expect to address those challenges. Essential elements of the school's academic and non-academic programming demonstrate how the school will fulfill its goals and mission. In the few cases where elements of the application are not yet fully developed, the applicant presents an achievable timeline and framework.

The applicant group is planning for conservative growth (i.e., adding no more than two grades and 150 students per year); applicants expecting more aggressive growth demonstrate further progress in developing the plan, including that the founding group has conducted significant community outreach, and present a contingency budget that includes growth of no more than 150 students per year.

- (3) Consistency of the mission and philosophy: The essential elements of the mission, philosophy, and school program are infused in each element of the application. The applicant presents evidence to support the program design and, if applicable, responds to evidence that challenges or refutes elements of the proposed program.

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- (4) **Inclusiveness:** Each element of the school program is deliberately designed to be inclusive of all students, including students with disabilities, English learners, students who are academically struggling or advanced, homeless students, and any other population(s) specifically targeted in the mission. Each element of the school program must accommodate and serve students who do not fit into the school's target population but who may be admitted through the enrollment lottery.
- (5) **Founding group ability:** A number of people comprise the founding group, and, together, they demonstrate their collective ability to ensure that the proposed school can meet the educational objectives outlined in the application. This is demonstrated through a thorough application, with key personnel identified as part of the founding group, multiple members of the founding group responding to questions in the capacity interview and public hearing, and founding group members working collaboratively and cohesively in providing responses. Key personnel transitioning to full-time staff will have relevant experience and expertise for their role at the proposed school. Collectively, founding groups must demonstrate the following:
- a. [NS] experience running a not-for-profit or small business; experience educating students similar to those in DC in a school setting; experience and deep knowledge of all elements of the proposed program;
 - a. [SMO] a history of strong academic and non-academic results with student populations similar to those found in DC public schools, with the DC school leader as part of the team or the process for identifying the leader clearly outlined and a detailed plan for supporting the DC school;
 - b. understanding the DC educational landscape and how to attract students and families, such as having prospective parents as part of the founding group, or written commitments from community leaders in support of the school;
 - c. holding a strong commitment to the education of **all** students, including having a member of the founding group with deep special education expertise and English learner expertise;
 - d. having clear systems in place to ensure financial stability and legal compliance.

In addition, each application is expected to be completed in full, with no questions unanswered, and easy to read with few, if any, grammatical, spelling, or syntax errors. All references and sources must be clearly cited; **plagiarism will be grounds for denial of an application.**

DC PCSB reviews each application in its entirety, not only for the standards of each section to be met, but also for the ability of the founding group to implement the plan. Based on information gathered throughout the application review 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 founding group's ability to implement the plan, sound budget, and demonstrated need for the school. SMO applicants must have a proven track record of success with a similar population to DC, and an articulated plan to provide comprehensive school support, including identification of a school leader. Conditional

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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 are permitted to reapply during another application cycle at least 12 months after the cycle in which it was denied.

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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; an Education Plan; a Management Plan; and a Finance Plan. Following this format ensures an objective review of proposals to establish public charter schools in the District of Columbia.

All applicants, but particularly those proposing novel or unusual program elements are encouraged to discuss their application with DC PCSB to ensure their application will appropriately and comprehensively address all elements of their program. **The overall length of Sections A, B, C, and D of the application must not exceed 125 pages**, though DC PCSB recommends no more than 100 pages. Elements of the written application marked with an asterisk (*) in the following table of contents count towards the 125-page limit.

Written applications should conform to the following table of contents:

Cover

Table of Contents

Applicant Information Sheet

Executive Summary*

- A. Establishing a Need*
 - 1. Evaluating the Landscape
 - 2. Recruitment and Retention
 - 3. Community Input

- B. Education Plan*
 - 1. Curriculum
 - 2. Support for Learning
 - 3. [SMO] Historical Academic Performance
 - 4. Charter Goals and Student Academic Achievement Expectations

- C. Management Plan*
 - 1. Founding and Leadership
 - 2. Staffing Plan
 - 3. Management and Internal Oversight
 - 4. [SMO] School Management Organization
 - 5. Student Policies and Procedures

- D. Finance Plan
 - 1. Facilities*
 - 2. Finance*
 - 3. Budget Workbook

* Items marked with an asterisk count towards the 125 page limit.

[NS] Applies only to new schools.

[EO] Applies only to experienced operators.

[SMO] Applies to all schools planning to contract with a school management organization.

Forms and Required Documents

E. Founding Group Supporting Documents

- Résumé; and
- Disclosure of any actual or potentially perceived conflicts of interest, if applicable.

If a founding group member's résumé does not fully demonstrate their qualifications for serving on the founding group, the qualification(s) may be further detailed in **Section C.1. Founding and Leadership**.

If the founding group member plans to join the founding board, also include:

- Board Member Agreement (in a separate file)
- Conflict of Interest Form

The following sections should not be printed but should be submitted with the electronic versions only.

F. Additional Required Documents

1. Articles of Incorporation
2. Bylaws
3. Code of Ethics
4. Conversion Endorsement Certification, if the applicant proposes to convert an existing private or public school to a public charter school
5. Letter of Intent for Facility, if a facility has been identified and preliminarily secured
6. Draft Memorandum of Understanding, Letter of Intent, or Contract for Mission-Critical Partnerships
7. Assurances Form
8. [SMO] Management Agreement and Related Documents
9. [SMO] SMO's Financial Audits for the last three years
10. [SMO] SMO's Annual Reports for the last two years
11. [SMO] SMO's IRS filings for the last three years

G. Curriculum Samples⁴

⁴ Applicants may redact parts or the whole of **Section G: Curriculum Sample** 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.

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Applicant Information Sheet

To download an editable version of the Applicant Information Sheet, please visit:
<https://dcpcsb.egnyte.com/dl/TfKEIXkO3j>

Note: The full application, including this form, will be posted on DC PCSB’s website. Local community members, including members of the media, may contact the designated representative for questions about the proposed school. **Do not redact contact information on this sheet.**

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

If applicable, affiliated **School Management Organization:** [Click here to enter text.](#)
Affiliated SMO is: Non-profit For-profit

Designated Representative: [Click here to enter text.](#)

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

Please list the names of all members of the founding group and, when applicable, their role in the proposed school. At a minimum, the school must identify founding group members to fill the roles listed below for the application review process, and, if approved, the planning year. One person may be identified for two or more roles, if needed. Founding team members may eventually be incorporated into the school’s charter agreement as key personnel. Founding group members may choose to stay in their respective roles once the school is operational or transition to different roles prior to the charter agreement being executed.

Founding Group Member Names	Proposed Role
Name	Board Chair
Name	Head of School/CEO
Name	Director of Operations
Name	Chief Financial Officer
Name	Special Education Coordinator
Name	Data Manager
Name	EL Coordinator
Name	Model-Specific Role <i>(optional/if applicable)</i>

Type of Application:

New School Conversion of Existing School: Public Private

If conversion, name of the school being converted: [Click here to enter text.](#)

Proposed First Year of Academic Operation: [Click here to enter text.](#)

Relationship between the school and its employees:

Contract At-will

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Applicants are invited to provide more information about this under Section C: Management Plan, Staffing Plan.

Requested Enrollment Ceiling^{5,6}

	YEAR	YEAR	YEAR	YEAR	Add columns until reaching capacity.
PK3					
PK4					
K					
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
Adult					
TOTAL					

Proposed Location of School (must be limited to no more than two wards adjacent to one another): [Click here to enter text.](#)

If applicable, list all schools that the EO/SMO currently operates, has been approved to operate, or is currently applying to open:

School	Location	Year Opened	Grades Served (now and at capacity)	Number of students (now and at capacity)
Add additional rows as necessary to detail all schools.				

⁵ If the school enrolls more students than are included in this schedule for a particular year, it will not be funded for those additional students. The school may enroll greater numbers in a particular grade, as long as it does not exceed the total enrollment ceiling.

⁶ A schedule of enrollment ceilings will be included in the proposed school's charter agreement. Given the importance and complexity of the enrollment ceilings, and potential shifts in facility availability or requirements, it is DC PCSB's expectation that most approved applicants will collaborate with DC PCSB staff to finalize their enrollment ceilings before earning full charter approval.

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If you have previously applied for a charter, or operated a charter school in the District of Columbia, please provide relevant information about the application/school, including name of the school, year of application, authorizer (DC PCSB or DC Board of Education), year opened/closed, etc., as applicable.

[Click here to enter text.](#)

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Executive Summary

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

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Section A: Establishing the Need

[See D.C. Code §§ 38-1802.02 (2), (4), (6), (14)]

Note: Public charter schools are public schools, and must serve all students, regardless of race, ethnicity, national origin, ability, language ability, religion, gender, sexual orientation, and gender presentation. The application should reflect a willingness and eagerness to accommodate and welcome all students, even those who do not fit your intended population.

1. *Mission and Philosophy*

[See D.C. Code §§ 38-1802.02 (1)]

- Write a concise mission statement for the proposed school. The mission statement must 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 learners, will benefit from the proposed mission and philosophy.
- [EO] 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.
- Discuss the key pillars of the model. [SMO] What adjustments may be considered in expanding to DC? (e.g., All DC LEAs must provide a continuum of services for students with disabilities.)
- Discuss any evidence validating the use of your proposed model, particularly with the school’s target population. Address any evidence that challenges or refutes the validity of the model or significant elements of the program design.

Standard for Approval

Note: The evaluation for this section is dependent on the whole application, including the capacity interview, public hearing, and, if applicable, site visits.

Applications will generally be considered having met the standard for this section when the mission meets an unmet need in D.C. and fully aligns with the school’s education philosophy and program. The education philosophy is expected to meet the needs of the likely student body, including those not specifically targeted by the school but likely to enroll, such as students with disabilities. [SMO] The applicant clearly describes how it will adjust its existing program (if at all) to improve the educational options available to DC families. Key evidence includes:

- The mission statement explains the “who” (targeted population), the “how” (education model), and the “why” (education philosophy).
- The application demonstrates that the school’s mission and philosophy is consistently woven through the applicant’s planning and school development process.

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- [NS] and the founding group has collectively the experience to implement all aspects of the education program and is, therefore, able to meet the needs of the target student population and those not in the target population but likely to enroll.
- [SMO] The applicant group demonstrates 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 learners, economically disadvantaged and at-risk students, and students above or below grade level.

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2. *Evaluating the Landscape*

- Describe the education needs of the population the proposed school is seeking to serve and how your school is poised to address those needs.
- Describe the proposed school's target population, including grade levels and demographics, and the demographics of comparable schools. Based on this information:
 - describe how the school will complement the existing options available to families;
 - describe any demographic variance between your projected student population and that of nearby or similar schools, particularly in the rates of English learners, students with disabilities, and at-risk/economically disadvantaged students; and
 - [SMO] 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.
- Show how these needs are not being met by the existing public school options in your school's target area.
- Demonstrate that there will be sufficient demand to sustain the proposed school. **Address demand specifically, as opposed to need.**
- If you are proposing to operate a school serving any grades between prekindergarten and 12 and plan to have your only entry or exit grade be one other than what is typical for a DCPS elementary, middle, or high school, discuss the feeder patterns and school options for students matriculating into and out of the school.
- You must respond to [DC PCSB's most recent analysis](#)⁷ in your application. Paying particular attention to the sections titled "Key Insight" throughout the document, please either leverage the analysis to support the need and demand for your program or acknowledge and explain any tension between DC PCSB's analysis and your proposal.

Notes:

- The most common student entry points for PK-12 DCPS schools are prekindergarten (PK), Kindergarten, 6th, and 9th grades.
- Any further discussions of student demographics in other areas of the application should refer back to this section as necessary.

In responding to these prompts, applicants are encouraged to use the Sample Data Tables available in Appendix A.

⁷ Charter Programs, Need and Growth in Washington, DC: <https://dcpcsb.org/start-charter-school>.

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3. *Recruitment and Retention*

Note: In DC, almost half of public school students attend charter schools, and competition for students is robust.

- What evidence do you have that families are interested in your school's program?
- How will the school attract students in your target population? Please discuss strategies to reach non and limited-English proficient families and students.
- What challenges, including competition from other schools, do you foresee in recruiting and retaining students?
- [SMO] What recruitment practices do you use in your existing school(s)? What are your waitlist numbers by grade? Will you adjust these strategies to recruit students for the DC school, and if so, how?

Standard for Approval

Applications will generally be considered having met the standard for this section when the application establishes a need and demand for the type of education program offered, particularly among the targeted population. The recruitment plan is designed to specifically attract the school's target population without excluding any students, regardless of race, ethnicity, national origin, ability, language ability, religion, gender, sexual orientation, and gender presentation. Key evidence includes:

- The applicant has multiple years of experience working with populations similar to those found in DC public schools and the populations targeted in their mission.
- The target population is reflective of DC public school students, either as a whole or a subset thereof.
- The applicant demonstrates that they know DC's school choice market and describe the *demand* and *need* to sustain the proposed school. The application presents reliable, recent, and comprehensive data demonstrating that there will be sufficient *need* and *demand* to sustain the proposed school.
- The applicant has a thorough and accurate plan for how the school will meet its expected growth trajectory, including a description of recruiting strategies that have been successful either in DC or other jurisdictions with competitive charter markets.
- [SMO] The SMO has a history of full enrollment in its existing schools. It presents a rationale for maintaining or adjusting its existing recruitment and marketing strategies based on community input and an understanding of DC's school choice market.

Note: If two or more substantially similar applicants (e.g. same program model and/or grade brand) largely meet the standard for approval and propose to open in a similar location, DC PCSB staff will conduct an independent assessment of demand that considers whether that location could sustain more than one similar program. Based on this assessment, DC PCSB may recommend that the Board conditionally approve only one of those applicant groups. This recommendation will be made based on the applicant group with fewer weaknesses identified in staff's recommendation proposal to the DC PCSB Board.

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4. *Community Input*

- Identify your school's key stakeholders and community members. Identify which of these people and institutions you have already engaged and how.
- Define what makes your program a good match for your communities' unique wants and needs. What is your role in supporting your school's communities?
- Identify how you anticipate addressing issues of race, class, gender, sexual orientation, ability, national origin, and religion.
- Describe how the community has been and will continue to be engaged in the planning, development, and implementation of the proposed school. Describe the stakeholders and tactics (e.g. how many and how often will you reach out) involved in the school's community engagement strategy.
- Determine the ways you will respond to community input about the school program.

Standard for Approval

Applications will generally be considered to have met the standard for this section when the applicant demonstrates an understanding of the community or communities the school is likely to serve. This includes having infrastructure (e.g., staff, goals, plans) for parent and community engagement, having done research and outreach in the community, and using this information in developing the school program. The founding group demonstrates cultural competency specific to the communities it seeks to work with and DC in general, including the ability to articulate the root causes of the needs it seeks to fill. The applicant has well-developed plans for broadening and strengthening relationships with families and the school's community or communities. Key evidence includes:

- The community engagement progress to date and plan for moving forward incorporate diverse stakeholders, touch points, and tactics, which are well-suited to reach the school's target population.
- The founding group began its community outreach before their application submission.
- The founding group demonstrates an understanding of the economic, political, historical, and social contexts of the community it seeks to serve. The applicant understands the unique characteristics of DC's education landscape, and is aware of its communities' wants and needs, as well as assets and strengths.
- The founding group describes how members of the community have been involved in the design and will continue to be involved in the implementation of the proposed school. The founding group articulates a decision-making process for determining when and how to adjust its plans based on such feedback.

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Section B: Education Plan

1. Curriculum

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

In these guidelines, *curriculum* is defined as the combination of standards, resources/instructional materials, methods of instruction, and the 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 subject, including English language arts, math, science, and social studies/history, health⁸/ physical education, as well as any additional electives offered and any mission-specific discipline (e.g. life skills, career certifications) taught at your school. Include descriptions for each grade span ultimately taught at the school. The section can be organized to best represent the proposed program, but must include all of the curricular elements outlined below.

[EO] The expectation is that you will be using the same curriculum currently used at your existing school(s), making only slight modifications to reflect regional differences in standards and resources. If you are developing a brand new curriculum, you should apply as a new school. See instructions for **Section G: Curriculum Sample** for more information. Please use the section below to explain your curricular choices while **Section G: Curriculum Sample** should contain a curriculum sample for review.

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

Applicants proposing high school diploma-granting programs and requesting waivers of seat-time (“Carnegie unit”) requirements may be subject to additional reporting requirements.⁹

Applicants must also include curriculum samples in **Section G: Curriculum Sample**.

a. Student Learning Standards (What will students learn at your school?)

- What learning standards will be used for each essential subject, and why did you choose these standards? If you have not yet chosen standards for a specific discipline, what are the criteria for choosing those standards?
- What additional standards for learning English will be incorporated to ensure that students who are not fluent in English will be able to learn English as well as the academic content?
- [SMO] 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

⁸ Health is a mandatory subject in DC according to D.C. Code § 38-824.02. See <http://osse.dc.gov/publication/2016-health-education-standards> for more details about DC health standards.

⁹ For more information about the process for receiving a waiver to award competency-based units (rather than Carnegie units), see: http://osse.dc.gov/sites/default/files/dc/sites/osse/page_content/attachments/Credit%20Flexibility%20Application%20Information%20and%20Review.pdf

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curriculum? What changes, if any, did you make to your choice of standards and what challenges do you anticipate in implementing these standards in DC?

b. Methods of Instruction (How will students learn/teachers teach?)

- What does high quality instruction look like in the proposed school?
- What methods of instruction will be used in each subject area and grade span? How will the methods help students learn the standards?
- How will you accommodate different learning styles and the needs of all students, including English learners, students with disabilities, students who are far below or above grade level, and the targeted student population? Describe the rationale for using your strategies with these populations, citing expert opinion or research that the program is based on a sound educational theory or a legitimate experimental strategy. In your description, please detail your methods of instruction for students who require a separate setting outside of the general education environment (i.e. resource and self-contained classrooms). Also, please state your language acquisition model that you will use to meet the varying needs of students across English proficiency levels. In case a particular instructional strategy fails with all students, a subset of students, or an individual student, how will you evaluate and adjust the effectiveness of your school's instructional methods?
- [SMO] 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?
- [SMO] Describe how staff at existing school(s) will help support the DC staff with learning the instructional strategies both before the school year starts and during the school year. How will you ensure that the caliber of teaching in DC will be at the same level as at your existing schools?

Note: Public charter schools are not permitted to segregate students with disabilities or English learners from their general education peers solely due to their disability or lack of English proficiency.

c. Resources and Instructional Materials

Instructional materials include but are not limited to: textbooks/workbooks, books, novels, online programs, manipulatives, teacher resources, smart-boards, and/or computer software.

- What resources/instructional materials have you identified?
- If you have not yet identified all resources and instructional materials, please describe the process that will be used to do so.
 - If you plan to have teachers develop resources during the planning year, please be sure to use your *Staffing Plan* to describe how qualified teachers will be hired and supported to complete this work.
- How will these resources meet the needs of all learners, in all instructional settings, including the target population, English learners, students with

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- disabilities, those who are far below or above grade level, and those who enter school in later grades?
- How and why did you select these resources? Cite examples where these resources have been used with similar populations or, if the proposed materials are novel and lack an established research base, describe why they are likely to succeed with the school's population.
- [SMO] If applicable, describe what, if any, changes you anticipate making in your choice of resources for your DC schools.

d. Assessing Learning (How will you know students are learning?)

- Describe each assessment's purpose, design, and format, and the rationale for its selection. If applicable, explain who will develop original assessments.
- 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 the school identify students who may be struggling and would benefit from academic and/or behavioral interventions? Specifically discuss strategies for monitoring the progress of students who have exited SpEd or EL status.
- Explain how teachers, school leaders, the school's board, and students and parents will have access to and be able to use assessment results.

Note: Public charter schools are required to administer a Home Language Survey to all students enrolling in a DC public school for the first time and the ACCESS for ELLs 2.0 state assessment to kindergarten through 12th graders who have been identified as ELs. Applicants do not need to discuss these assessments or their uses in their charter application, but should be prepared to administer and act on them.

e. Course Listing

- Provide the proposed school's subject/course list by grade. Include all grades that will be offered at capacity.
- For high school grades, specify which courses are required for graduation, the number of credits for each course, and the minimum grade/score that students must earn to earn credits.

f. Promotion Requirements

All Applicants:

- Describe your student retention policies, including any retention requirements related to student absences or repeated tardiness. Under what circumstances would a student be retained between grade levels or at the school's terminal grade?
- How will you ensure that these policies do not negatively impact students with disabilities and English learners in particular?
- Also respond to the following questions, as appropriate based on which grade(s)/level(s) you plan to serve.

Pre-kindergarten, Elementary, and Middle School:

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- What supports will be in place to ensure students with academic deficits at the beginning of the year are making adequate progress to be eligible for promotion at year's end? Include how students with disabilities, English learners, and "at-risk" populations are provided additional support, if needed, to matriculate through the school with their peers.

High School:

- What procedures will the school institute to ensure students progress adequately and appropriately toward graduation, 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, English learners, and "at-risk" populations are kept on track to graduate.
- List the school's graduation requirements, including required courses, credits, minimum passing grades, etc.

Adult Education:

- Describe the requirements a student must meet to obtain a secondary credential, i.e. GED, National External Diploma Program (NEDP), career certification, and/or English 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.

Standard for Approval

Applications will generally be considered as having met the standard for this section when the application describes a comprehensive curriculum (standards, resources, methods of instruction, and formative assessments for each core, elective, and mission-specific subject) for every grade level that the school plans to operate at capacity. The curriculum must be inherently inclusive and designed to be responsive to students' needs; be clearly interrelated between its components; and be directly aligned to the school's goals, mission, and education philosophy. The Curriculum Samples include all courses necessary to prepare students to meet the school's mission and goals, including all necessary credits for high school graduation, if applicable, and any mission-specific courses; and demonstrate that the applicant has the capability to design or select a comprehensive, high quality curriculum before its first academic year of operation. [SMO] The basis of the curriculum has proven effective in the applicant's existing school(s) as measured by student outcomes. Key evidence includes:

- Each element of the curriculum for each discipline and grade level is supported by experience and/or research. For applicants presenting a novel approach that is not yet supported by research or school-based evidence, the applicant compellingly describes why the curriculum is likely to succeed.
- Either the applicant chooses the Common Core State Standards for English language arts and mathematics or equally strong standards that emphasize critical thinking and ensure success on state assessments. For other subjects and grade levels, the applicant group identifies rigorous standards that align with the school's mission, goals and academic achievement expectations.

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- Embedded in the instructional methods and resources are concrete strategies and materials to support students with disabilities (SWDs), ELs, and academically struggling students. The proposed curriculum is reasonably likely to result in appropriate implementation of student IEPs, including appropriate placements.
- The curriculum includes concrete examples and strategies for how differentiation occurs for students who are academically advanced or struggling for each course and grade level.
- The application describes mechanisms and/or strategies that ensure equitable access to the curriculum for all students, including SWD and ELs. This must include, at minimum, tracking of student progress, evidence-based early interventions in cases of lack of student progress, and strategies for ensuring collaboration between general education and special education teachers.
- The application describes a plan to ensure an appropriate education for all limited and non-English proficient students, including: no barriers to enrollment for non- or limited-English proficient students; timely assessment of the English proficiency level; placement in an appropriate instructional program, including provision of adequate and appropriate instructional resources and full access to all educational programs, services, and activities; ensuring students exit EL programming appropriately; and monitoring of former ELs to ensure they continue to make appropriate academic progress after exiting EL services.¹⁰
- The applicant addresses student subgroups individually, recognizing and planning for the diverse needs of diverse students. For example, the applicant describes instructional methods for SWD that are distinct from those used for ELs.
- The applicant explicitly states the language acquisition model that the school will use to meet the varying needs of students across English proficiency levels.
- The applicant distinctly articulates how students with disabilities in all settings are able to access the general education curriculum, and how methods of instruction are adapted to support students who may require a separate setting outside of the general education classroom.
- For schools with non-traditional calendar structures: 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, and, if applicable, what standards, methods, and resources will be used to support that learning.

¹⁰ Per DCMR 5-E926, schools will be required to develop and submit to OSSE an EL plan including each of these elements. For more information about the six stages of progression through an EL program, see <http://www2.ed.gov/about/offices/list/ocr/ell/cprogression.html>

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2. Support for Learning

[See D.C. Code §§ 38-1802.02 (6.D), (10), (11), (14), (15); 38-1802.04(c)(13)]

Applicants proposing schools with non-traditional calendar structures (e.g. year-round, residential/boarded, and virtual/blended/flipped programs) should include those program elements in this section as relevant.

a. School Culture

- Describe your desired school culture and the methods you will use to establish it. Some relevant components may include:
 - Your theory of classroom and behavior management;
 - The systems, traditions, policies, and symbols that will give your school its identity;
 - How the culture will reinforce positive student behavior and high expectations for student learning; and
 - How the school will monitor student social, emotional, and behavioral development.
- [SMO] Describe how these strategies have evolved in your existing school(s) and what adjustments you will make in your DC school.
- Describe what strategies you will implement to encourage attendance and re-enrollment. [SMO] Describe how these strategies have evolved in your existing school(s) and what adjustments you will make in your DC school.
- 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, and those who are new to schooling in the US.
- 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.
- Include a draft of the proposed school's discipline policy for each grade span offered at full capacity.
- How will the school ensure that behavior policies are equitable and consistently implemented across subgroups?
- In this narrative or in the proposed discipline policy, indicate when an out-of-school suspension or expulsion may be discretionary versus mandatory.

Note: DC PCSB is unlikely to approve applications for schools with discipline policies that rely solely on exclusion to manage student behavior and/or that are likely to result in high rates of suspensions and expulsions. In particular, DC PCSB expects that schools will only expel students for federally-recognized reasons. For information on DC charter sector discipline rates, please see <https://dcpccb.org/public-charter-school-data>.

b. Structure of the School Day and Year

- Provide a draft of the proposed school's calendar, specifying:
 - The number of days the school will be in session,
 - The daily hours of operation,
 - Average instructional minutes per day overall and for core content,
 - Before- and after-care options, if any,

[NS] Applies only to new schools.

[EO] Applies only to experienced operators.

[SMO] Applies to both experienced operators and schools planning to contract with a management organization.

- Extra- or co-curricular activities, and
- Non-instructional days, such as those devoted to assessment, independent or work study, professional development, and parent-teacher conferences.
- If you plan to operate a school that does not follow a traditional schedule (August-June, approximately 180 six-hour days), describe how the structure of the day and year will support the school's mission and goals.
- If the school calendar includes frequent professional development or training events for all teachers during the regular school day, describe your plan, if any, for students' activities and monitoring during these times.

Note: *Pre-kindergarten through twelfth grade programs* must meet or exceed a minimum of 1080 hours (180 days x six hours). Schools that plan on fulfilling some of those hours outside a traditional brick-and-mortar setting should contact DC PCSB to discuss a seat hour waiver or other accommodation. *Adult schools* must offer 432 hours (36 weeks x four days x three hours) of seat time per year to be eligible for full funding for each student. Please contact DC PCSB staff for more information.

c. Family Engagement

- Describe the proposed school's philosophy around family engagement, and how it plans to promote this philosophy. How do family engagement efforts support the school's broader goals and vision? What are your goals for family engagement?
- How do you plan to build relationships between school staff and students and families?
- How do you plan to share academic information with students and families?
- Address how you will include families in your activities and communications who cannot speak and/or read and write in English.
- Applicants proposing schools with non-traditional calendar structures (e.g. year-round, residential/boarding, and virtual/blended/flipped programs) should describe how, if at all, their family engagement plan will differ from those of more traditional school programs.

d. Community Participation

- Describe how the community has been, and will continue to be, engaged in the planning, development and implementation of the proposed school.
- Describe any services, resources, programs, or volunteers that the school will provide to the community.
- Describe any partnerships the school will have with community organizations, businesses or other education institutions to provide key academic or non-academic services, supports, or opportunities. For each of these partnerships, describe:
 - The nature, purposes, terms, and scope of services,
 - How the partnership will further the school's mission and goals,
 - The organization's purpose, mission, and history, if relevant, and
 - Who at the school will be responsible for managing the partnership.
- [SMO] Describe how your existing school(s) are engaged in the surrounding community, addressing any significant positive initiatives and negative interactions that have occurred.

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For any partnerships that will be providing services or programs integral to the school's mission, provide a draft Memorandum of Understanding, contract, or letter of intent in **Section F: Additional Required Documents**. This should be signed by a representative of the partner organization with contact information.

Standard for Approval

Applicants will generally be considered having met the standard for this section when the applicant demonstrates:

- **Sufficient progress in developing the plan:** Essential elements of the Support for Learning program are explained in 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. In particular:
 - Community Participation demonstrates that the school will continue to have the necessary community support to carry out its proposed program, especially with regard to partnerships with community organizations. Any mission-critical partnerships are backed by demonstrated support or commitment from the partner.
- **Demonstrated need:** The applicant demonstrates that the applicant has researched and assessed families' and students' needs, and each element of the Support for Learning plan addresses those needs. The applicant demonstrates that it will ensure family participation in the school's operation. In particular:
 - School Culture describes a student behavior management system that is likely to result in a low rate of out-of-school suspensions and expulsions, is not overly punitive, and distinguishes between outcomes that are automatic (e.g., possession of a firearm necessarily results in expulsion) versus those that are discretionary (e.g., possession of illicit substances may result in an in-school suspension, an out-of-school suspension, or a diversion program).
- **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.
- **Inclusiveness:** Each element of the Support for Learning component is deliberately designed to include the families of students with disabilities, English learners, students who are academically struggling or advanced, and any other populations targeted in the mission, e.g. economically disadvantaged, at-risk, etc. In particular:
 - Family Involvement includes a plan for communicating with parents/guardians whose primary language is not English.

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- **Founding group ability:** 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.

Each element of the Support for Learning plan will be judged according to the above criteria.

[NS] Applies only to new schools.

[EO] Applies only to experienced operators.

[SMO] Applies to both experienced operators and schools planning to contract with a management organization.

3. [SMO] Historical Academic Performance

This section applies to both experienced operators and schools planning to contract with a school management organization.

For each of the school management organization/experienced operator's existing schools, provide information about academic performance.

If applicable, refer to data provided in earlier sections of the application (e.g. **Section A: Establishing the Need**).

- Submit quantitative data for each existing school operated by the SMO 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:
 - *Required:* State/authorizer accountability results for all student subgroups¹¹ served, disaggregated by grade level.
 - *Required:* 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;
 - *Required:* In-seat attendance rate; short-term out-of-school suspension rate; long-term out-of-school suspension rate¹²; mid-year withdrawal rate; and expulsion rate for every existing school.
 - *Optional:* Non-academic indicators that describe the school's performance including retention rates, graduation rates, college enrollment and/or persistence rates, and demand as evidenced by waiting lists, as compared to similar schools in the state and/or district;
 - *Optional:* Any additional evidence that the existing design has been effective in raising student achievement.

Applicants are encouraged to use the Sample Data Tables available on page 71 for reporting non-academic data.

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 or student groups not tracked or published by the state or authorizer.

- Explain the data, including trends, strengths, and weaknesses. This should include evidence of closing achievement gaps and moving low-performers to higher proficiency levels.
- 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. Applicants must

¹¹ At a minimum, subgroups should include: race, ethnicity, SWD, ELs, and low-income or at-risk students.

¹² 10 or more days of out-of-school suspensions is calculated as the sum of students who have been suspended for 10+ days *cumulatively*, not necessarily in a single disciplinary incident, divided by the number of students enrolled.

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submit any qualitative reviews conducted by the authorizer(s) of their existing school(s).

Note: These data should be provided for all schools associated with the SMO. 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 learners at a campus).

Standard for Approval

Applicants will be considered having met the standard for this section when the applicant presents compelling quantitative evidence that the SMO has had at least a three-year track record of success educating students similar to those targeted by the proposed school, specifically externally validated (from a charter authorizer or state education agency) results that show the school has achieved high levels of student proficiency and growth, and reduced student achievement gaps. Key evidence includes:

- The operator has achieved above-average proficiency and growth rates for its students (in aggregate, by student subgroup,¹³ and by grade level) on state/authorizer accountability systems, including the state assessment(s). For schools with untested grades or alternative populations, the application demonstrates impressive results on externally validated assessments (e.g. Terra Nova, NWEA, Scantron).
- Non-academic data disaggregated by subgroup show a low percentage of exclusionary incidents, i.e. expulsions, out-of-school suspensions; high re-enrollment rates; and demographic/enrollment statistics similar to those of comparable schools.
- 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 SMO will employ to avoid reoccurrence of these anomalies in the proposed DC school.

¹³ At a minimum, subgroups should include: African American/Black students, Hispanic/Latino students, SWD, ELs, and low-income students.

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4. Charter Goals and Student Academic Achievement Expectations

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

Charter goals and Student Academic Achievement Expectations are critical because they become the standard by which the approved charter school is measured during high stakes reviews. Schools are also required to report on their progress toward achieving both each year in their annual reports [See D.C. Code § 38-1802.04 (c) 11].

Student Academic Achievement Expectations: DC PCSB will measure student academic achievement expectations by measuring student performance on externally validated measures, such as the state assessment, SAT/ACT, graduation rates, Classroom Assessment Scoring System (CLASS), and GED, and publish these results in the Performance Management Framework (PMF) and the Equity Reports. Every school, regardless of what they choose as their charter goals, will have its student academic achievement published in the PMF and Equity Report and will receive a Tier. Generally, DC PCSB expects student achievement in every subgroup to perform at or above the city's average for that subgroup.

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

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

If a school elects to adopt 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, such as life skills, volunteerism, arts, should adopt specific goals to measure the expected student outcomes in addition to core academic goals.

This section should only include assessments and metrics that applicants plan to use for their goals, to which DC PCSB will hold them accountable. Interim, benchmark, formative, and other diagnostic assessments are discussed in

Section B: Education Plan

Curriculum

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

Note: Due to the importance and complexity of these goals, most applicants are conditionally approved with the expectation that they will collaborate with DC PCSB staff to finalize their goals before earning full approval.

a. Adopting the PMF as Goals

Applicants may choose to adopt the PMF as goals for all proposed grades. There are specific frameworks for: (1) schools serving any or all grades between pre-kindergarten

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and 8); (2) schools serving grades 9-12; and (3) programs for students 16 and older not earning a high school diploma but earning an equivalency diploma or certificate. There is also an Alternative Accountability Framework for diploma-track programs for at-risk or high need special education students.¹⁴

When adopting the PMF as their goals, schools commit to meeting an overall score on the PMF over the life of their charter, in accordance with the PMF as Goals Policy.

Applicants who anticipate eligibility for the Alternative Accountability Framework¹⁵ (AAF) and who wish to adopt the AAF as their goals must develop the goals that would be included in their 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 unique goals and student academic achievement expectations

Schools may choose to adopt individualized goals in addition to or instead of the PMF. **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). Schools whose grades include those tested by the state assessment must have one goal for reading and one for math that commits the school to exceeding the state average proficiency rate for that particular assessment. Schools that elect to adopt unique goals and student academic achievement expectations will be expected to provide third party verification of student outcomes (e.g. publisher score reports).

Schools are encouraged to create 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 students (e.g. all, specific grade level, returning students).
- **Measurable:** 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-kindergarten classrooms) and to provide the necessary data to determine goal attainment (e.g. NAEP does not provide 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:** 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. Goals using metrics not included on the PMF should be set based on third party research or the assessment provider's benchmarks; provide references in a footnote or appendix.

¹⁴ For complete details on adopting the PMF as goals, please see <http://www.dcpccb.org/policy/elect-pmf-charter-goals-policy>

¹⁵ For complete details on the AAF, please see <http://www.dcpccb.org/alternative-accountability-framework>

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- **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 measurable 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 and may include intermediate goals.

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 adopt a progress goal for fluency in the target language, a performing art school may adopt a goal around student participation in the performing arts). These additional goals must 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 this section, unless there is clear evidence that the founding group does not understand the PMF or the implications of this decision.

b. Adopting unique goals and student academic achievement expectations

If the applicant does not elect to adopt the PMF as goals, applications will generally be considered having met the standard for this section when its goals are:

- SMAART (Specific, Measurable, Ambitious and Achievable, 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 Mission-Specific Goals

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

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Section C: Management Plan

1. *Founding and Leadership*

[See D.C. Code §§ 38-1802.02 (9), (12), (13); 38-1802.05]

a. Profile of Founding Group

- Identify the key members of the founding group, highlighting what experience they will bring to the school. Include individuals who have contributed substantially to the development of the application or who will contribute substantially to the school's development, governance and/or operation.
- [SMO] Specify which members of the founding group are employees of or otherwise affiliated with the SMO.
- 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 this school has closed or is slated for closure, describe the circumstances that led to the closure.
- Please explain how the founding group came together and develop the application.

b. Key Personnel

The applicant should identify which founding group members will also be key personnel for the school during its planning year, first year of operation, and beyond. Alternatively, if certain key personnel roles will not be filled by members of the founding group, the applicant can explain the process they will use to identify and hire those employees.

Note: DC PCSB will conduct background checks on the founding board (not the founding group). The founding board is the board of trustees for the first year of academic operations) for those applications that are granted full approval or approval with conditions. DC PCSB may not automatically reject board members based on any criminal record; in collaboration with the school, DC PCSB will attempt to address any records that may present a concern about effectively managing a school (e.g., embezzlement or fraud; child abuse or neglect).

Note: Founding groups intending to contract with a SMO may delegate the recruitment, selection, and hiring of school leaders to the SMO, provided this service is included in the draft management contract and detailed in **Section C: Management Plan, [SMO] School Management Organization**.

For identified Key Personnel:

- Provide all documents expected of founding group members in Section E: Founding Group Supporting Documents.

For Key Personnel:

- Provide the job descriptions for all key personnel.

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- For key personnel yet to be identified, provide selection criteria for each role.
- How do the job descriptions and hiring practices support the school in fulfilling its goals and mission?
- [EO] Explain the organization's plans for developing a pipeline of potential leaders for the network.

c. Planning Year

- Provide a calendar of activities that the school will undertake from charter approval to opening day, specifying who will be responsible for each task. Include such milestones as:
 - Transitioning to a Board of Trustees;
 - Hiring key personnel who were not part of founding team;
 - Creating and/or finalizing curriculum, including purchasing assessments and materials, and completing curriculum maps, unit plans, and lesson plans;
 - Creating discipline, attendance, promotion, and grading policies;
 - Hiring instructional staff;
 - Identifying, purchasing and renovating (if necessary) a facility;
 - Engaging the community and recruiting students; and
 - Other planning activities.
- Discuss what you anticipate will be the challenges of starting a new school or [SMO] expanding to a new city and how you expect to address these challenges.

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).

Standard for Approval

Applications will generally be considered having met the standard for this section when the founding group—specifically the collective group included in the written application and participating in the capacity interview and public hearing—has, collectively, all areas of knowledge and expertise necessary to operate a successful charter school, and the school leaders will have the expertise and resources to fulfill the school's mission and goals. Key evidence includes:

- The founding group has, collectively, expert professional knowledge and requisite skills in all areas needed to open a successful public charter school, including organizational, financial, legal, real estate/facilities, start-up, and other operational capabilities along with extensive, recent, and relevant teaching/school leadership experience with a population similar to that the school plans to serve. English learner and DC special education experience is also key.
- The founding group has identified the school leaders or the skills and experiences necessary for the leaders who will open and operate the school during its first few years of academic operation. Founding groups intending to contract with a SMO may delegate the recruitment, selection, and hiring of school leaders to the SMO, provided this service is included in the draft management contract.

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- The school leadership positions include necessary qualifications and time allocations, and are reasonable for school design.
- The founding group has identified, at a minimum, the Board Chair and Treasurer. If the founding group has not identified any other potential board members, it has detailed a timeline identifying the remaining members (except parent members) no less than three months before the start of school, while ensuring that the selected board members will have the requisite skills, vision, and dedication to fulfill the school's mission and philosophy.
- The planning year includes a timeline for completing at least the following tasks:¹⁶
 - Transitioning to a Board of Trustees;
 - Identifying and hiring key personnel;
 - Creating and/or finalizing curriculum, including purchasing assessments and materials;
 - Creating discipline, attendance, promotion, and grading policies;
 - Hiring instructional staff;
 - Identifying, purchasing and renovating (if necessary) a facility; and
 - Engaging the community and recruiting students.

¹⁶ It is DC PCSB's assumption that these tasks will be completed before the school begins academic operations, though not necessarily before the school receives its first local funding disbursement.

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2. Staffing Plan

[See D.C. Code §§ 38-1802.02 (12), (15), (18); 38- 1802.07]

If applicable, in the appropriate subsection of the Staffing Plan, describe any planned approaches to human resources (recruiting, training, staff roles, etc.) that you consider a unique feature or particular strength of your application.

a. Staffing Levels

- Explain your method for determining appropriate staffing levels based on your students' needs and staff caseload. If necessary based on the enrollment growth plan, specify the staffing growth needed to serve a larger student body.
- Provide job descriptions and the anticipated number of each position for:
 - Academic staff: e.g. general education teachers, special education teachers, instructional coaches, EL coordinator, curriculum development specialists;
 - Non-academic staff: e.g. data manager;
 - Qualified professionals with the specialized expertise required to appropriately serve students with disabilities and English learners: e.g. special education and EL teachers, special education and EL coordinators, evaluators, related service providers; and
 - Mission-specific staff: e.g., residential staff, internship coordinators, technology support.

Note: The staffing levels discussing here should match those listed in the Staffing Plan tab of the Budget Workbook.

b. Teacher Quality/Expectations¹⁷

- Describe the steps you will take to build a pipeline of quality teachers and leaders for your school, including how the school will compete with other schools in the recruitment of teachers. Some aspects to consider include:
 - The selection criteria for hiring teachers;
 - The planned mix of experienced and new teachers;
 - Salary ranges and benefit plans;
 - Professional development (specific questions below); and
 - Teacher evaluation (specific questions below) and retention.
- Describe the professional development that will be provided to teachers, administrators and staff to implement the education program and meet the proposed goals. Specifically mention the professional development necessary to:
 - Develop unit and lesson plans or implement preset lesson plans;
 - Ensure high quality instruction in all classrooms;
 - Support the use of data to inform teaching; and
 - Support any unique programs offered by the school.
- Address specific professional development plans related to teaching struggling students, as well as those with disabilities and English learners, including:

¹⁷ Applicants may find the National Council on Teacher Quality's report on DC helpful:

<http://www.nctq.org/statePolicy/2014/statePolicyFindings.do?stateId=8>

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- Professional development for all staff on the proposed school's special education and EL service delivery model;
- Strategies for modifying curriculum and instruction to accommodate student needs;
- The legal requirements of disciplining students with disabilities;
- Teacher responsibility to address IEP goals, accommodations, and modifications; and
- Continuing training to ensure teachers and staff are informed of most recent changes in special education policy, regulations, and best practices.
- Describe the school's procedures for assessing teacher effectiveness. What quantitative and qualitative data will you use? What are the potential outcomes of a strong or weak evaluation?
- Create a sample week-long block schedule for a core-content teacher, including planning time and any extracurricular commitments.

Note: Schools are required to provide training for staff on administration of medication and mandated reporting compliance.

Note: Schools are required to enact policies on equal employment opportunities, the maintenance of a drug-free workplace, and assuring the rights and benefits of current employees of the District of Columbia Public Schools. Approved applicants will also be required to specify the school's relationship with its employees in their charter agreements.

Standard for Approval

Applications will be considered to have met the standard for this section when the staffing plan aligns with 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. The staffing and recruitment plan is expected to provide sufficient (in terms of number and qualifications) academic, non-academic, and mission-critical staff to cover all of the courses and programs described in the Education Plan. Key evidence includes:

- The job descriptions and staffing levels can be expected to ensure high quality academic and non-academic staff to cover all necessary functions, potentially including but not limited to:
 - General education teachers for all subjects offered;
 - Academic leaders (e.g. master teachers, instructional coaches, and/or curriculum development specialists);
 - Special education and EL teachers;
 - Special education coordinators and/or compliance specialists; and
 - Mission-specific staff.
- The teacher recruitment and retention plans are likely to attract and retain the quality and specific expertise needed to support the school's academic program. The applicant has a realistic sense of how and where to recruit the teachers it needs. The teacher evaluation processes weigh rigor and high expectations with respect for teachers' professionalism.

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- The PD plan is broad, covering all necessary areas to prepare teachers to fulfill the school's goal, including offering consistently high quality instruction, as well as flexible enough to respond to teacher/PD needs as they develop throughout the school year. The PD plan specifically addresses any supports the student population may require.

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[SMO] Applies to both experienced operators and schools planning to contract with a management organization.

3. Management and Internal Oversight

[See D.C. Code §§ 38-1802.02 (7), (8), (9); 38-1802.07]

a. Administrative Structure

- Include an organizational chart. If you plan for organizational growth after the first year of operations, include organizational charts for the first and fifth years of operations.
- Describe the relationship of the Board of Trustees to the school's administrative structure and staff, and to parents and students.
- Outline the succession plan for the board members and leadership.

b. Performance Management

- Describe how the board will be organized to manage and provide strategic direction for the proposed school, including any board committees. What orientation or ongoing training will board members receive?
- Describe how the Board of Trustees will hold school leadership 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. This should include an annual evaluation of the school leaders' performance.
- What key academic, organizational, and financial indicators will the board review to assess the school's effectiveness and stability? How often will these indicators be reviewed and by whom?
- Explain how the parents, teachers, community members, and students of the proposed school will have input in decision making, including during the planning year. Refer to prior sections, particularly **Section A: Establishing the Need**, as applicable.

Note: Charter schools are required to develop informal complaint/grievance policies per the SRA, D.C. Code § 38-1802.04(c)(13). This process should comply with federal law and policy, including but not limited to IDEA, Section 504 of the Rehabilitation Act, Titles IV and IX, Title II of the Americans with Disabilities Act, and the Age Discrimination Act.

c. Fiduciary Responsibility

As the fiduciary of the school and public assets, the Board of Trustees is responsible for ensuring adequate controls to prevent fraud and ensure that funds provided to the proposed school are used and managed appropriately, including (a) establishing clear job responsibilities of the staff and board members who direct or execute financial transactions; (b) establishing strong financial and accounting procedures, effective internal controls, and policies for managing actual or perceived conflicts of interest; and (c) conducting reviews of external audits. This fiduciary responsibility includes compliance with the SRA, particularly D.C. Code § 38-1802.04(c) and DC PCSB's Procurement Contract Submission Policy¹⁸, which govern schools' procedures for awarding procurement contracts and submitting board meeting minutes.

¹⁸ DC PCSB's Procurement Contract Submission Policy is available here: <https://dcpcsb.org/procurement-contract-submission-policy>

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- Describe the financial management and internal control procedures of the school.
- 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 prevent any actual conflicts and to mitigate perceived conflicts.
- Describe the board's process for conducting, reviewing, and acting on the results of the school's annual financial audits and interim financial statements, including reviewing and approving procurement contracts and monitoring the use of public funds.
- Describe the protocols in place to ensure general fiscal health, including compliance with applicable laws and regulations, e.g., Federal grant regulations, and prevent material events that can affect the school's current or future financial position.
- State whether the nonprofit organization intends to have (a) member(s). Describe the rationale and purpose of the member(s), the process for selecting member(s), the powers the member(s) will have, and what control, if any, the member(s) will have over the Board of Trustees. Include an organizational chart for the member(s).

Note: Submit the Articles of Incorporation, Bylaws, and Code of Ethics Statement in **Section F: Additional Required Documents** of the application. These may all be initial drafts of the final documents.

Standard for Approval

Applications will generally be considered having met the standard for this section when the administrative structure is designed to (a) put students first, including being responsive to family and community input; (b) achieve the school's mission and goals; and (c) ensure legal compliance, particularly in terms of proactively preventing financial fraud and ensuring the appropriate use of public funds. The governance structure will set up an active, engaged, knowledgeable Board of Trustees that has timely, deep, and broad knowledge of the school's operations and finances and students' needs, and operates independently and autonomously. Key evidence includes:

- The governance structure creates a forum for parent, teacher, and community input and the strategies for communicating board priorities and decisions include all stakeholders.
- The financial policies are comprehensive and likely to prevent fraud, including:
 - clear job responsibilities of the staff and board members who direct or execute financial transactions;
 - strong financial and accounting procedures and internal controls, such as credit card use policies, segregated accounting and finance duties, and robust bookkeeping standards;
 - clear, robust policies for managing actual or perceived conflicts of interest;

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[EO] Applies only to experienced operators.

[SMO] Applies to both experienced operators and schools planning to contract with a management organization.

- direct Board oversight of potentially concerning procurement contracts, including any large or unusual contracts; and
- in-depth, at least quarterly reviews of budgets, actuals, forecasts, and external financial audits.
- The applicant has established protocols to ensure strong financial performance, compliance with generally accepted accounting principles (GAAP) and major federal fund requirements, and no material events that can affect the school's future health.

Note: No school will receive **full** approval unless its bylaws and Articles of Incorporation meet the requirements of the DC School Reform Act, including:

- School submits a Certificate of Incorporation
- The school's name includes the term "Public Charter School," as documented in the nonprofit organization's Certificate of Incorporation.
- The bylaws or articles of incorporation contain a dissolution clause specifying that upon revocation, non-renewal or relinquishment (closure) of a school's charter, the school will develop a plan pursuant to D.C. Code §§ 38-1802.04(c)(16), 38-1802.13a.(c)(1).
- Neither the Articles of Incorporation or the bylaws specify that the nonprofit organization may operate for religious purposes.

Note: Applicants are not required to begin the nonprofit incorporation process before submitting a charter application.

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4. [SMO] School Management Organization

[See D.C. Code §§ 38-1802.02 (13)]

This section is only applicable to experienced operators (EO) and schools planning to contract with a school management organization (SMO). Some elements of this section, including the Standard for Approval, are adapted from the National Association of Charter School Authorizer's (NACSA) criteria for charter schools' contracts with management companies. Applicants considering contracting with a SMO are encouraged to review NACSA's Principles and Standards for Management Contracts.¹⁹

Per the Public Charter School Fiscal Transparency Amendment Act of 2015²⁰, schools contracting with a SMO must include the following language in the draft management agreement:

"Upon request of [the charter school], [the management company] agrees to provide to [the charter school] for production to the DC PCSB books, records, papers, and documents related to services [the management company] provided or has agreed to provide to [the charter school] if (a) the annual fee [the charter school] agrees to pay to [the management company] or any of [the management company]'s related entities (as defined by 26 U.S.C. 168(h)(4)(B)-(C)) is equal to or exceeds 20% of [the charter school]'s annual revenue, or (b) the annual revenue [the management company] expects to derive from DC public charter schools will exceed 25% of [the management company]'s projected total annual revenue."

Every charter school is managed by a non-profit Board of Trustees, which is ultimately responsible for the success or failure of the school, and any consequences that may result. If contracting with a SMO, the Board should have an independent attorney and accountant working for it, not for the SMO.

a. SMO Selection

- Describe the process by which the SMO was selected. Refer to the SMO's Historical Academic Performance (Section C: Management Plan, [SMO] School Management Organization) as necessary.
- 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 may open pending the results of active charter applications, and applications planned or under consideration. Applicants are encouraged to use the Sample Data Tables available on page 71.
- Disclose any schools the SMO has operated that have closed, and describe any sanctions placed on the SMO's short of closure, including, but not limited to, shortened or conditional renewals, withdrawals of charters, non-openings of

¹⁹ NACSA's Principles and Standards for Management Contracts are available at: http://www.qualitycharters.org/wp-content/uploads/2015/08/Principles-and-Standards_2015-Edition.pdf, on page 24.

²⁰ The Public Charter School Fiscal Transparency Amendment Act of 2015 is available here: <http://lms.dccouncil.us/Download/33498/B21-0115-SignedAct.pdf>

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- 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 and explain the circumstances of such publicity.
 - Disclose any current or past litigation proceedings or federal, state, or authorizer complaints against the SMO or its schools.

b. Relationship between the Board and the SMO

- Describe the process by which the SMO's performance will be evaluated and monitored on an ongoing basis. Describe how the Board of Trustees will hold the SMO accountable for meeting the goals set forth in the charter, ensuring compliance with all applicable laws and regulations, and maintaining fiscal viability – independent of any representation by the SMO on the school's board.
- Describe plans to have SMO membership on the Board of Trustees, if any.
- Describe the SMO's role in operating the school.
- The contract between the Board and the SMO is expected to be arms-length, competitive, and easily severed by the local board. List all conditions and the process under which the contract with the SMO may be severed by the Board. These should be listed in the draft management contract.
- Describe anticipated financial transfers *other than management fees* between the school and the SMO or its affiliates, if applicable. Include start-up, emergency/contingency, or other funds provided to or loaned to the school.
- Describe how the charter school's resources will be segregated from those of the affiliate organization, including exclusively local use of DC public funding.

In Section F: Additional Required Documents, provide the following:

- A draft management agreement between the school and the SMO;
- An organizational chart showing the relationship among all business entities being operated by or affiliated with the SMO/EO; and
- The SMO/EO's most recent annual reports, financial audits, and IRS filings.

Standard for Approval

Applicants will generally be considered having met the standard for this section when the SMO selection was based on evidence of quality, above average academic and non-academic performance at all existing schools; the Board of Trustees has procedures in place for independently overseeing and evaluating the SMO's performance; and the relationship between the Board of Trustees and the SMO is arms-length and the contract can be terminated without undermining the school's continued operations. There is clear differentiation of roles and responsibilities of the proposed school's Board of Trustees, the administrative leadership of the school, and the SMO. Key evidence includes:

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- The SMO has extensive, recent, relevant, and successful experience with a population similar to that the school plans to serve. The SMO has a strong history of academic and organizational success, including no recent closures of or corrective actions against any of its managed schools, and demonstrated improvements after any previous corrective actions.²¹ (**Note:** This can be addressed in more depth in the following section.)
- 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).
- The proposed fees charged by the SMO are reasonable based on the level of services to be provided.²²
- The financial relationship between the SMO and the school are clearly separable, including:
 - Public funds flow directly to the charter school and all equipment and furnishings purchased with the public funds remain property of the school;
 - 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;
 - All loans between the SMO and the school will be appropriately documented and at market rates; and
 - Any pass-through expenditures (e.g., rent payments paid by the charter school to the SMO and then paid by the SMO to the landlord) will be appropriately documented and certified as accurate by regular agreed-upon procedures audits, conducted by an auditor from DC PCSB’s Approved Auditor List.
- The relationship between the Board of Trustees and the SMO is arms-length and presents no actual or perceived conflicts of interest, either disclosed in the application or discovered by the application review team. If Board members of the school are employed or selected by the SMO, these members represent a permanent minority.
- The submitted organization chart illustrates the roles of the proposed school’s Board of Trustees, administrative leadership, and the SMO.
- The SMO disclosed records of any negative publicity.
- The relationship between the board and the SMO is fully defined, including:
 - A detailed list of services and associated fees;
 - Academic, financial, and operational performance expectations for the SMO;
 - The roles and responsibilities of the board of trustees, school staff, and the school management organization;
 - Disclosure of existing relationships between the founding group and the school management organization, including potential conflicts of interest; and

²¹ DC PCSB considers any corrective actions or school closures within three academic years “recent.” Any schools that faced closure should have three years of data reflecting significant improvements.

²² While the fee level will change based on the level of services provided, DC PCSB expects that the fee will not be above 15-17%. DC PCSB is particularly opposed to fees set at 100% of the school’s revenue.

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- Conditions for contract renewal or termination, including effective procedures for terminating the relationship in case of academic, financial, or operational failure.
- The SMO 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.

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5. Student Policies and Procedures

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

a. Student Enrollment Policies

All public schools must comply with the SRA and DC regulations regarding student enrollment and residency verifications. For more information about these requirements, visit <http://osse.dc.gov/service/enrollment-and-residency>.

- Indicate whether the school will join My School DC, the common application lottery. If the school is not joining the common lottery, explain your rationale, and include your anticipated application release date and due date, along with policies for administering a waitlist.
- Explain your policy for accepting students mid-year, if space becomes available.
- What is the proposed school's enrollment policy for back-filling grades both during the school year and between school years?
- If you are limiting enrollment to certain grades, explain your reason for this and how you will accommodate for annual attrition.

b. IDEA / Special Education Compliance

Note: Public charter schools are required to comply with all federal laws, including IDEA, Section 504 of the Rehabilitation Act, and the Americans with Disabilities Act, as well as DC laws, regulations, and policies implementing these federal requirements, including providing a Free and Appropriate Public Education in the least restrictive environment,²³ and a full continuum of services for SWD.²⁴ Public charter schools will be held accountable to OSSE's policies and procedures around specialized education services, including ongoing monitoring from day one of operations. More information about OSSE's monitoring and compliance requirements are available here:

<https://osse.dc.gov/page/special-education-students-disabilities> Public charter schools offering pre-kindergarten programs should be particularly well-versed in Part C-to-B requirements of IDEA; schools offering middle, high, alternative, and adult programs should be well-versed in Part B requirements of IDEA.

Note: Funding for special education may only be used for special education services. On an annual basis, schools are required to report their special education-related expenditures to OSSE in a Maintenance of Effort report. For more information about Maintenance of Effort reporting, please visit <https://osse.dc.gov/publication/idea-maintenance-effort-spreadsheet-template>

²³ For guidance on how to implement LRE requirements, please see:

<http://osse.dc.gov/sites/default/files/dc/sites/osse/publication/attachments/OSSE%20DSE%20LRE%20TOOLKIT%2001%2011.pdf>

²⁴ Pursuant to the regulations promulgated by the U.S. Department of Education, each public agency "must ensure that a continuum of alternative placements is available to meet the needs of children with disabilities for special education and related services." 34 C.F.R. § 300.115. The District of Columbia Office of the State Superintendent of Education's regulations mirror the federal regulations, stating that alternative placements shall include instruction in: (a) regular classes, with push-in, co-planning, or co-teaching; (b) special classes, either pull-out or self-contained; (c) special schools; (d) home instruction; and (e) instruction in hospitals and institutions, and require Local Education Agencies to provide "supplementary services, such as resource rooms and itinerant instruction, ... in conjunction with regular class placement." 5 DCMR, tit. 5-E § 3012.

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Note: Public charter schools are required to comply with the Americans with Disabilities Act. This requirement will factor into each school's facility approval process.

In responding to each of the following prompts, applicants may refer to other sections of the written application as necessary.

- Describe how you will implement a full continuum of services for all SWD, Levels 1 through 4, including students who require a separate outside of general education setting (i.e. resource classroom or self-contained). Describe the physical setting(s) in which you will provide services, when and by whom services will be provided, and by what processes students will be assigned to resources and supports pursuant to their IEPs. Refer to sections B.4: Curriculum, C.2: Staffing Plan, and other sections of the written application as appropriate.
 - In providing a full continuum of services, what services will you provide with staff versus external contractors?
- Describe how the school will establish a preliminary Child Find system.
- Describe how the school will determine appropriate discipline procedures for SWD, referring to Section B.4.a: School Culture as appropriate.
- Describe how the school will meet secondary transition requirements, if applicable.
- Describe the methods for identifying and serving students requiring Section 504 plans.
- Describe the methods for informing parents about their and their child's rights associated 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? Refer to Section B.4.c: Family Involvement as appropriate.
- Briefly describe the school's plan for ensuring compliance with OSSE requirements related to serving SWD. Include:
 - Plans for responding to communications from OSSE and other parties related to dispute resolution events (mediation, state complaints, and due process complaints/hearings).
 - Systems for tracking and reporting student data, including progress on IEPs and services provided; and
 - How the school will address and correct non-compliance identified by OSSE in a timely manner.
- [SMO] Describe the differences and similarities between the strategies proposed and those 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?

Standard for Approval

- 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 proposed policy for back-filling vacated seats is inherently inclusive of all students and aligned with the school's mission.

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- The processes and procedures for identifying and serving students with disabilities complies with IDEA and Section 504 of the Rehabilitation Act, and incorporates established best practices.
- The applicant has planned for all contingencies, including different rates of SWD, different disabilities, different settings in which services will be provided (inside and outside of the general education setting), different levels of need, and how the school will adjust their program and processes accordingly.
- The founding group has demonstrated a sufficient understanding of federal and local laws, regulations, and policies to appropriately identify, serve, and report data on students with disabilities.
- The special education plan is aligned with the school's mission and philosophy, including being appropriate for the target population.
- The applicant describes the systems and strategies it will implement to effectively serve SWD, not simply the requirements of the law.
- The Child Find system includes, at minimum, procedures for transitioning students from Part C to Part B; public awareness, screening, referral, and evaluation.²⁵

²⁵ Please see OSSE's Child Find policies and guidance for additional information: <http://osse.dc.gov/service/specialized-education-policies-and-regulations>.

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Section D: Finance Plan

1. Facilities

[See D.C. Code §§ 38-1802.02 (6)]

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, enrollment growth plans, fulfillment of all mission-critical space requirements, and any involvement of the community in the design of the proposed school. Refer to other parts of the application, particularly **Section A: Establishing the Need**, as applicable.
- 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 C: Management Plan, Founding and Leadership**.
- If proposing to convert an existing public school, include in the discussion whether the Department of General Services or another DC government agency, has agreed to or will be expected to provide any capital improvements to the site.
- If the identified site is intended to be temporary (e.g. based on enrollment growth plans), answer the questions below for *If a facility has not been identified*.

If a facility has not been identified:

- Describe the space requirements needed for the proposed school (e.g., square footage, number and types of classrooms, amenities, etc.)
- 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, fulfillment of all mission-critical space requirements, and any involvement of those communities in the design of the proposed school. Refer to other parts of the application, particularly **Section A: Establishing the Need**, as applicable. Use information on these sites to inform budget assumptions in the Budget Workbook.
- Describe the effect that the location will have on the student recruiting strategy or other costs like transportation.
- Describe how the school will position itself in the real estate market to secure a facility, including any agreements with partners to assist in the facility identification process.

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 a site has been identified, include a Letter of Intent in **Section F: Additional Required Documents** indicating the terms and conditions of the proposed lease.

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2. Finance

[See D.C. Code § 38-1802.02(6)]

Note: For more information on DC PCSB’s oversight of schools’ finances, please see DC PCSB’s Financial Audit Review (FAR) at <http://www.dcpsb.org/report/school-finances>. The FAR also provides aggregate and average expenditures on high-level expense categories (e.g., salaries and benefits, occupancy, etc.) for existing DC public charter schools.

Note: DC public charter schools may not charge tuition; instead, schools are funded based on the Uniform Per Student Funding Formula (UPSFF). Each fiscal year, UPSFF funding is allotted based on how many students each public charter school enrolls by “count day” each year, typically October 5. For each student, the school receives a foundational amount of approximately \$9,700 multiplied by certain factors depending on each student’s grade range and certain need categories (special education, English Learner, and at-risk), as well as approximately \$3,100 in additional funding to support facilities expenses.

UPSFF payments are made by the Office of the Chief Financial Officer (“OCFO”) to each public charter school on a quarterly basis, generally on or about July 15, on or about October 25, on or about January 15, and on or about April 15.

- The July 15 payment is based on each public charter school’s projected enrollment, or the number of students that the school expects to enroll.
- The October 25 and January 15 payments are based on each public charter school’s certified enrollment, or the number of students that the school certifies is enrolled in and attending the school as of count day.
- The April 15 payment is based on each school’s audited enrollment, or the number of students counted as enrolled on count day by OSSE’s enrollment auditing team through the physical student count.

DC public charter schools are also eligible for “supplemental” funding, which is allocated to support students who are identified as eligible for the funding need categories (special education, English Learner, or at-risk) after the audit.

- Explain the specific financial goals and objectives for the projected five-year budget (e.g., capital improvements, equipment, increased instructional and staffing costs).
- 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, or outlays are higher than expected.
- [SMO] Describe anticipated financial transfers between the school and the SMO 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.

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- Describe any planned fundraising efforts to generate capital, to cover planning or development costs prior to opening the school, or to supplement the per-pupil allocation for operating expenses.²⁶
- Describe the school's cash flow management plan and how it will ensure availability of funds throughout the year.

Note: The charter school must maintain its financial records in accordance with generally accepted accounting principles. [See D.C. Code § 38-1802.13(b)(1).]

Note: *For schools planning to contract with a school management organization, the charter school's resources and funds must be segregated from those of the SMO, and DC funds must be used exclusively for goods and services provided to DC students.*

Note: Funding for special education may only be used for special education services. On an annual basis, schools are required to report their special education-related expenditures to OSSE in a Maintenance of Effort report. For more information about Maintenance of Effort reporting, please visit <https://osse.dc.gov/publication/idea-maintenance-effort-spreadsheet-template>

²⁶ DC PCSB does not require schools to engage in ongoing fundraising to support their program, though many existing schools do.

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3. Budget Workbook

[See D.C. Code §§ 38-1802.02 (6)]

Complete and submit all sheets of the Budget Workbook, saved as *School Name - Budget Workbook – Application Cycle.xlsx*. The blank Budget Workbook, which includes some instructions, is available at <https://dcpcsb.egnyte.com/dl/m6GzFnuTzS>.

Note: The projected/targeted enrollment in the Enrollment Projections sheet should be less than the maximum enrollment, included in the Requested Enrollment Ceiling from the Applicant Information Sheet. Applicants may use a more conservative (i.e., lower) projection for special populations (i.e., special education, English learner, and at-risk) than they anticipate enrolling.

Note: The blank Budget Workbook is designed to be a guide, not a requirement. Applicants are responsible for ensuring that all relevant elements of the proposed school are included in the budget and that budget assumptions are reasonable. Experienced operators or founding groups working with a school management organization are welcome to use the existing organization's budgeting software/templates, provided they are accurate, comprehensive, and transparent.

Standard for Approval

Applications will be considered having met the standard for this section when finance and facilities plans, including the Budget Workbook, are thoroughly developed and aligned with the proposed school's mission and education program. The budget is balanced and conservative; reflects all necessary outlays, including any unique programs described in the Education Plan; ensures adequate levels on cash on hand, including cash reserves and/or contingencies for unexpected shortfalls; and contains no accounting errors. The revenue projections are realistic and sufficient to meet school expenditures. 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. Key evidence includes:

- At a minimum, the budget is balanced, error free, and based on realistic expectations for income and expenditures, which are clearly detailed in the Budget Workbook.
- 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.
- If the budget includes private fundraising revenue of more than 5% of its income:
 - the application details a strong fundraising plan,
 - the founding group includes a member or advisor with significant fundraising expertise, and

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- the supplemental budgets based on exclusively public funding meet the Standard for Approval.
- 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. charter support organizations, banks;
 - community involvement; 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.

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Section E: Founding Group Supporting Documents

For each founding member of the founding group, submit:

- Résumé, labelled with their planned position in the school (e.g. Board Member, Executive Director, not continuing after application approval);²⁷ and
- A disclosure of any real or potentially perceived conflicts of interest, including but not limited to financial transfers between the school and any members of its founding group, founding board, or founding leadership, or their relatives.

If the founding group member plans to join the Founding Board, also include:

- Board Member Agreement, including performance expectations.
- Signed Conflict of Interest form (available on page 64) with separate attachment of explanations, if necessary.

Note: DC PCSB will conduct background checks on the founding board for those applications that are granted full approval or approval with conditions. DC PCSB may not automatically reject board members based on any criminal record; in collaboration with the school, DC PCSB will attempt to address any records that may present a concern about effectively managing a school (e.g., embezzlement or fraud; child abuse or neglect).

Conflict of Interest Form

If you answer “yes” to any of the following questions, provide an explanation on a separate sheet.

	Yes	No
Do or will you, your spouse, or any member of your immediate family have any contractual agreements with the proposed charter school?		
Do you, your spouse, or any member of your immediate family have any ownership interest in any school management organization or any other company contracting with the proposed charter school?		
Did or will you, your spouse, or any member of your immediate family lease or sell property to the proposed charter school?		
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?		
Have you, your spouse, or any member of your immediate family guaranteed any loans for the proposed charter school or loaned it any money?		
Are or will you, your spouse, or any member of your immediate family be employed by the proposed charter school, its school management organization or other contractors?		
Did you or your spouse provide any start-up funds to the proposed charter school?		

²⁷ In the redacted electronic version of the application, remove all personal contact information (e.g. address, phone number, email address, etc. but not name).

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?		
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?		
Do you currently serve as a member of the board of any public charter school?		
Do you currently serve as a public official?		
Have you, your spouse, or any member of your immediate family applied to establish or participated in the establishment of a charter school?		
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 you to discharge your duties or exercise your judgment independently on behalf of the proposed charter school?		

Signature	
Name	Title
Name of Proposed School	Date

To download an editable version of the Conflict of Interest Form, visit:
<https://dcpcsb.egnyte.com/dl/PaGeTLxmHh>

Section F: Additional Required Documents

Include each of the following required documents under separate tabs or headings.

1. *Articles of Incorporation*
2. *Bylaws*
3. *Code of Ethics*
4. *Conversion Endorsement Certification, if the applicant proposes to convert an existing private or public school to a public charter school*
5. *Letter of Intent for Facility if a facility has been identified and preliminarily secured*
6. *Draft Memorandum of Understanding, Letter of Intent, or Contract for Mission-Critical Partnerships*

7. 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, within five years of the start of the school's first academic year. (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 DC 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 DC PCSB, using the reporting software required by DC PCSB. (D.C. Code § 38-1802.11(a)(2).)
8. Collect and report academic and non-academic performance consistent with DC 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 DC PCSB. (D.C. Code § 38-1802.02(15).)
12. Provide DC 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 procurement contract requirements of the D.C. Code § 38-1802.04(c).
14. Comply with districtwide assessment requirements determined by the Office of the State Superintendent of Education, or other D.C. laws, regulations, policies, or procedures. (D.C. Code § 38-1802.02(1).)
15. 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 mandatory reporting

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 Learners:** all federal and local laws and applicable regulations regarding identifying and serving students who are English learners and their families;
- 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 DC PCSB (D.C. Code § 38-1802.11(a)(1)(B)).

Signature	
Name	Title
Name of Proposed School	Date

To download an editable version of this form, visit:
<https://dcpcsb.egnyte.com/dl/w6GbyUdKfl>

Experienced operators and schools planning to contract with a school management organization (SMO) must also include:

8. Draft Management Agreement and Related Documents

If applicable, include the organizational chart showing the relationship among all business entities being operated by or affiliated with the school management organization.

- 9. SMO's Financial Audits, including A-133, for the last three years*
- 10. SMO's Annual Reports for the last two years*
- 11. SMO's IRS Form 990 (or other IRS filings) for the last three years*

Section G: Curriculum Sample

In addition to the narrative on curriculum philosophy and process, provide one each of the following elements (a-c) for math or science and one for ELA or history for one grade per grade band that the school aims to serve at full capacity.²⁸ Applicants are invited to use the sample curriculum templates available on page 73.

Applicants adopting an existing curriculum may include a link to the full curriculum in lieu of the elements listed below.

- a. A year-long curriculum map. This may include:
 - Unit objectives
 - Standards
 - Resources
 - Assessments

- b. For one unit from each curriculum map (a), create a sample unit plan. This may include:
 - Objectives
 - Standards
 - Lesson names or basic descriptions
 - Activities
 - Resources
 - Assessments

- c. For each lesson from each unit plan (b), create a sample lesson plan. This may include:
 - Title
 - Objectives, goals
 - Materials, environment, resources
 - Procedure
 - Assessment
 - Reflection

Applicants who are not adopting an existing curriculum (including curriculum maps for each core subject for all grades served at full capacity) should discuss how and when curriculum maps will be developed.

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

²⁸ For example, a proposed middle school could provide two of each of the elements: one for 6th grade ELA and one for 6th grade science. Another example would be a proposed 6th-12th program, which would submit one of each element for 7th grade science, 7th grade ELA, 10th grade science, and 10th grade ELA.

Appendix A: Forms

Sample Data Tables

Student Demographics:

Applicants are encouraged to use this table for Demonstrating a Need (**Section A: Establishing the Need**) of the proposed school. Experienced operators and schools planning to contract with a school management organization are also encouraged to use this table to provide a demographic analysis each of the EO/SMO's existing school(s) (individually, not in aggregate) in **Section A: Establishing the Need, Demonstrating a Need**.

Race/Ethnicity					Special Education ²⁹				English Learners	Low Income
AA / Black	Hispanic / Latino	White	Asian	Other	Level 1	Level 2	Level 3	Level 4		

Similar Schools:

Applicants are encouraged to use this table to present information on similar schools. **Helpful Resources** on page 8 may be valuable in completing these tables.

Similar School 1	(Name)			
Ward & Neighborhood Cluster	School Type	Total Enrollment	Low-Income	<i>Applicants are encouraged to include other statistics related to their target populations</i>
	(DCPS / PCS / Independent)		%	
Black	Hispanic / Latino	White	Asian	Other
%	%	%	%	%
Special Education				English Learners
Level 1	Level 2	Level 3	Level 4	
%	%	%	%	%
Proficiency on State Assessment – ELA	Proficiency on State Assessment – Math	Growth on State Assessment - ELA	Growth on State Assessment – Math	
%				

²⁹ Special education levels are set by the number of hours of specialized services the student receives per week. Level 1: 8 hours or less; Level 2: More than 8 but less than or equal to 16 hours; Level 3: More than 16 but less than or equal to 24 hours; Level 4: 24+ hours.

Non-Academic (Attendance & Discipline) Data:

Applicants are encouraged to use the following tables to report data on the non-academic performance of their existing school(s).

School Name	In-seat attendance rate ³⁰	
	School Year	School Year

School Name	Students with 1 or more days of out-of-school suspensions		Students with 10 or more days of out-of-school suspensions ³¹		Students with disabilities with 1 or more days of out-of-school suspensions of		Expulsions	
	#	%	#	%	#	%	#	%

³⁰ 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.

³¹ Ten or more days of out-of-school suspensions is calculated as the sum of students who have been suspended for 10+ days *cumulatively*, not necessarily in a single disciplinary incident, divided by the number of students enrolled.

Sample Curriculum Templates

a. Year-Long Curriculum Map

[Name of Curriculum Map]						
	Month(s)					
Unit objectives						
Standards						
Resources						
Assessments						

Please specify the grade and subject(s) for each year-long curriculum map. Include as many columns for months as necessary. Create a single table for all subjects or a separate table for each subject.

b. Unit Plan

[Name of Unit Plan]						
	Week(s)					
Objectives						
Standards						
Lesson names/descriptions						
Activities						
Resources						
Assessments						

Please specify the grade, subject, and unit for each unit plan.

c. Lesson Plan

[Name of Lesson Plan]	
Title	
Objectives, goals	
Materials, environment, resources	
Procedure	
Assessment	
Reflection	

Please specify the grade, subject, and unit for each lesson plan.

[NS] Applies only to new schools.

[EO] Applies only to experienced operators.

[SMO] Applies to all schools – EO or NS – planning to contract with a management organization.

Appendix B: Application Checklist

2020 Application Acceptance Process

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

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

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

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

Submission Stage 1: Submit Non-Redacted Electronic Application

(1) Verify Completeness of Non-Redacted 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"/>
Management Plan*	<input type="checkbox"/>	<input type="checkbox"/>
Finance Plan*	<input type="checkbox"/>	<input type="checkbox"/>
Budget Workbook	<input type="checkbox"/>	<input type="checkbox"/>
Staffing Plan	<input type="checkbox"/>	<input type="checkbox"/>
Enrollment Projections	<input type="checkbox"/>	<input type="checkbox"/>
Year 0, Year 1 Projections	<input type="checkbox"/>	<input type="checkbox"/>
Years 1-5 Projections	<input type="checkbox"/>	<input type="checkbox"/>
Founding Group Supporting Documents (for each member of the founding group)	<input type="checkbox"/>	<input type="checkbox"/>
Résumé	<input type="checkbox"/>	<input type="checkbox"/>
Disclosure of conflicts of interest, if applicable	<input type="checkbox"/>	<input type="checkbox"/>
If the founding group member plans to join the founding board:		
Board Member Agreement	<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"/>
Code of Ethics	<input type="checkbox"/>	<input type="checkbox"/>
Conversion Endorsement Certification (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Letter of Intent for Facility (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Research on potential facilities (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Assurances Form		
[SMO] Management Agreement and Related Documents (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
[SMO] SMO's Financial Audits, including A-133 – 3 most recent years	<input type="checkbox"/>	<input type="checkbox"/>
[SMO] SMO's Annual Reports – 2 most recent years	<input type="checkbox"/>	<input type="checkbox"/>
[SMO] SMO's IRS filing – 3 most recent years	<input type="checkbox"/>	<input type="checkbox"/>

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Application Contents	Yes	No
Curriculum Sample ³²	<input type="checkbox"/>	<input type="checkbox"/>

Is the application under the 125 page limit? Yes No

*Items marked with an asterisk above are included in the 125 page limit.

Is there any evidence of plagiarism? Yes No

DC PCSB staff will use plagiarism review software to check for plagiarism.

(2) Stop: Notify Applicant of Completeness

Is the non-redacted electronic application complete? Yes No

If the application is not complete, the applicant may choose to resubmit all required elements of the application (including those listed below) by the full application deadline. Regardless of the completeness of the non-redacted electronic submission, all elements of Submission Stage 2 must be completed by the full application deadline.

Date & Time: [Click here to enter text.](#)

Application intake completed by: [Click here to enter text.](#) Application Number: [Click here to enter text.](#)

³² 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: Curriculum Sample** includes proprietary curricular materials, applicants may choose to redact parts or the whole of the curriculum from the redacted electronic version of the application.

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Submission Stage 2: Submit Full Application

(3) If the original Non-Redacted Electronic Submission was incomplete, verify completeness of Non-Redacted Electronic Submission. If the Non-Redacted Electronic Submission was complete, go to step 4.

Missing Elements	Yes	No
<i>(DC PCSB intake staff will specify)</i>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

(4) Verify Accuracy of Redacted Electronic Submission

The following elements should be redacted:

Application Contents	Content to Redact	Redacted
Founding Group Supporting Documents	Contact Information (Address, Phone, Email)	<input type="checkbox"/>
Curriculum	If the applicant has a completed curriculum, the application should include a link(s) to the curriculum maps, unit plans, and an example lesson plan for each subject area and grade level. If the applicant believes that this contains information that will cause substantial harm to the applicant’s competitive position if released publicly, it may redact parts or the whole of Section G: Curriculum Sample.	<input type="checkbox"/>
Signatures		<input type="checkbox"/>

(5) Accept Supporting Materials

In-person Submission

Supporting Materials	Yes	No
Five printed copies of the written application, in accordance with the Formatting Standards described on page 14.	<input type="checkbox"/>	<input type="checkbox"/>
A Microsoft Word (.doc or .docx) version of the application narrative, including: the Applicant Information Sheet, Table of Contents, and Sections A through D.	<input type="checkbox"/>	<input type="checkbox"/>
A PDF version of the written application, which must be searchable/OCR ³³ ; complete, including the application narrative and all attachments in a single	<input type="checkbox"/>	<input type="checkbox"/>

³³ For more information on how to create searchable/OCR PDFs, please see the Frequently Asked Questions: <http://bit.ly/InGOqjB>.

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Appendix C: Standard Conditions of Approval

In most cases of charter approval, DC PCSB staff recommends that the Board approve the applicant with conditions. Applicants typically receive between two and five customized conditions, based on the relative strengths and gaps in their applications, as well as the following conditions common to most new charter schools:

1. 501(c)3 Status

The school shall apply for and obtain 501(c)3 status.

2. Key Personnel

The school's Key Personnel, as will be listed in Attachment I to the charter agreement. Should any of these members of the founding team leave the school corporation prior to the school corporation receiving full charter approval, the school corporation shall replace the person with someone with similar experience. The replacement shall be subject to DC PCSB's approval of fulfillment of this condition.

3. Draft Charter Agreement

The school shall negotiate with and submit to be executed by DC PCSB a draft charter agreement that is consistent with DC PCSB's charter school agreement template, including all attachments. Please note that pursuant to D.C. Code § 38-1802.03(h)(2), the following sections of the charter application comprise the School's Charter and may require revision and are subject to Board approval, per D.C. Code § 38-1802.03(d)(1)(B):

- The School's statement regarding the mission and goals of the School and the manner in which the school will conduct any district-wide assessments;
- Proposed Rules and Policies for Governance and Operation of School Corporation;
- Articles of Incorporation and Bylaws;
- Procedures to Ensure Health and Safety of Students and Employees, including the school's proposed discipline policy;
- Enrollment Ceilings;
- Assurance to Seek, Obtain, and Maintain Accreditation; and
- Relationship between School and Employees.

By the time the agreement is finalized, the school shall be incorporated as a nonprofit organization under the DC Nonprofit Corporation Act, and the name of the school will include "public charter school" as required by DC Code § 38-1802.04(b)(1).

4. Management Agreement

In the event that the school contracts with a management company, the school will submit a draft Management Agreement to DC PCSB and, based on DC PCSB's review, the school will resolve any material concerns raised by DC PCSB.

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5. Facility

The school shall submit appropriate documentation evidencing that it has acquired title to or otherwise secured (e.g., a lease or letter of intent) a sufficient school facility to DC PCSB.

6. Governing Board

The school shall identify a governing board that complies with the School Reform Act. The school's governing board shall complete background check release forms to undergo background checks and, based on the results of those background checks, the school will resolve any substantial concerns raised by DC PCSB.

If, prior to full charter approval, DC PCSB staff determines that the school's opening is in jeopardy due to lack of progress in a) meeting any of the conditions listed above, or b) launching the school program in a manner that is economically viable and consistent with the educational objectives outlined in the school's petition, DC PCSB staff may propose to the Board that it vote to deny or delay full approval of the applicant's charter.