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**BEFORE THE TENNESSEE STATE BOARD OF EDUCATION**

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**IN RE:** )      **State Board of Education Meeting**  
**Nashville Collegiate Prep** )      **September 21, 2020**  
**Charter School Appeal** )  
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**FINDINGS AND RECOMMENDATION REPORT  
OF THE EXECUTIVE DIRECTOR**

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Pursuant to Tennessee Code Annotated (T.C.A.) § 49-13-108, Sponsors proposing to open a new charter school may appeal the denial of their amended application by a local board of education to the State Board of Education (State Board). On July 23, 2020, the Sponsor of Nashville Collegiate Prep (NCP) appealed the denial of its amended application by the Metropolitan Nashville Public Schools (MNPS) Board of Education to the State Board.

Based on the following procedural history, findings of fact, and Review Committee Report attached hereto, I am neutral with regard to whether or not the decision to deny the NCP amended application was “contrary to the best interests of the students, LEA, or community.”<sup>1</sup> Therefore, I recommend that the State Board utilize this report and the record provided to Board members to weigh the strengths and weaknesses of the NCP application to determine whether or not the Board should affirm or overturn the decision of MNPS to deny the amended application for NCP based on the best interest analysis.

**STANDARD OF REVIEW**

Pursuant to T.C.A. § 49-13-108 and State Board policy 2.500, State Board staff and an independent charter application review committee conducted a de novo, on the record review of the NCP amended application. In accordance with the Tennessee Department of Education’s charter application scoring rubric, “applications that do not meet or exceed the standard in all sections (academic plan design and capacity, operations plan and capacity, financial plan and capacity, and, if applicable, past performance) .

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<sup>1</sup> T.C.A. § 49-13-108.

. . will be deemed not ready for approval.”<sup>2</sup> In addition, the State Board is required to hold a public hearing in the district where the proposed charter school seeks to locate.<sup>3</sup>

In order to overturn the decision of the local board of education, the State Board must find that the local board’s decision to deny the amended charter application was contrary to the best interests of the students, local education agency (LEA), or community.<sup>4</sup> Because NCP is proposing to locate in a school district that contains a school on the current or last preceding priority school list, the State Board has the ability to approve the application, and thereby authorize the school, or to affirm the local board’s decision to deny.

### **PROCEDURAL HISTORY**

1. The Sponsor submitted its initial application for NCP to MNPS on February 3, 2020. MNPS assembled a review committee to review and score the NCP application.
2. On April 3, 2020, the MNPS Board of Education and its review committee held a capacity interview with the Sponsor during its scheduled workshop.
3. The MNPS review committee reviewed and scored the NCP initial application. A report was presented to the MNPS Board of Education regarding the review committee’s ratings; however, neither the review committee nor the MNPS staff made a recommendation to the MNPS Board of Education to either approve or deny the initial application.
4. On April 28, 2020, the MNPS Board of Education voted to deny the NCP initial application.
5. The Sponsor amended and resubmitted its application for NCP to MNPS on May 28, 2020.
6. MNPS’s review committee reviewed and scored the NCP amended application. Again, a report was presented to the MNPS Board of Education regarding the review committee’s ratings; however neither the review committee nor the MNPS staff made a recommendation to the MNPS Board of Education to either approve or deny the amended application.
7. On July 14, 2020, the MNPS Board of Education voted to deny the NCP amended application.
8. The Sponsor appealed the denial of the NCP amended application in writing to the State Board on July 23, 2020, including submission of all required documents per State Board policy 2.500.
9. On July 27, 2020, the State Board staff sent a request for information to MNPS and the Sponsor.
10. The State Board’s review committee independently analyzed and scored the NCP amended application using the Tennessee Department of Education’s charter application scoring rubric.

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<sup>2</sup> Tennessee Charter School Application Evaluation Rubric – Ratings and Sample Scoring Criteria, pg. 1.

<sup>3</sup> T.C.A. § 49-13-108. Due to the public health emergency, the public hearing was held virtually.

<sup>4</sup> Ibid.

11. On August 26, 2020, the State Board staff held a virtual public hearing. At the public hearing, the Executive Director, sitting as the State Board’s designee, heard presentations from the Sponsor and MNPS and took public comment regarding the NCP application.
12. On August 28, 2020, the State Board staff sent a second request for information to MNPS.
13. The State Board’s review committee conducted a capacity interview with the founding board of NCP and key members of the leadership team on August 31, 2020. Due to the COVID-19 public health emergency, the capacity interview was held virtually.
14. After the capacity interview, the State Board’s review committee determined a final consensus rating of the NCP amended application, which served as the basis for the Review Committee Recommendation Report, attached hereto as **Exhibit A**.

**FINDINGS OF FACT**

- **District Denial of Application.**

The review committee assembled by MNPS to review and score the NCP initial and amended applications consisted of the following individuals:

Name	Title
Dr. Gina Smallwood	Coordinator of Gifted and Talented, MNPS
Adrienne Useted	Consultant
Aliya Washington	Director of Elementary Literacy, MNPS
Dr. Gay Burden	Consultant
Diane Denney	Exceptional Education Coach, MNPS
Laseanda Sanders	Coordinator of School Counseling Services, MNPS
Brian Hull	Director of Resource Strategy, MNPS
Dr. James Starron	English Learner Coach, MNPS
Jessica Slayton	Director of Mathematics, MNPS
Kori Lyons	Analyst Financial II, MNPS
Katherine Poulos	Consultant
Denise Brown	Coordinator, MNPS
Dennis Queen	Executive, Office of Charter Schools, MNPS
Dr. John Thomas	Director, Office of Charter Schools, MNPS

The NCP initial application received the following ratings from the MNPS review committee:

Sections	Rating
Academic Plan Design and Capacity	PARTIALLY MEETS STANDARD
Operations Plan and Capacity	PARTIALLY MEETS STANDARD
Financial Plan and Capacity	PARTIALLY MEETS STANDARD

After the MNPS review committee completed its review and scoring of the initial application, its ratings was presented to the MNPS Board of Education on April 28, 2020. Based on this presentation, the MNPS Board of Education voted to deny the initial application of NCP.

Upon resubmission, the NCP amended application received the following ratings from the MNPS review committee:

<b>Sections</b>	<b>Rating</b>
Academic Plan Design and Capacity	PARTIALLY MEETS STANDARD
Operations Plan and Capacity	PARTIALLY MEETS STANDARD
Financial Plan and Capacity	PARTIALLY MEETS STANDARD

Again, in totality, the MNPS review committee found the NCP amended application did not meet the standard of the state rubric.<sup>5</sup>

After the MNPS review committee completed its review and scoring of the amended application, its ratings were presented to the MNPS Board of Education on July 14, 2020. Based on this presentation the MNPS Board of Education voted to deny the amended application of NCP.

- **State Board Charter Application Review Committee’s Evaluation of the Application**

Following the denial of the NCP amended application and subsequent appeal to the State Board, State Board staff assembled a diverse review committee of internal and external experts to independently evaluate and score the NCP amended application. This review committee consisted of the following individuals:

<b>Name</b>	<b>Title</b>
Scott Campbell	Executive Director, Persist Nashville
Ashley Davis	Educational Consultant
Catherine Johnson	Policy Coordinator, State Board of Education
Kelly Kroneman	Coordinator of Special Populations and Operations, State Board of Education
Grant Monda	Executive Director, Aurora Collegiate Academy
Whitney O’Connell	Schools Implementation Manager, EVERFI

The review committee conducted an initial review and scoring of the NCP amended application, a capacity interview with the Sponsor, and a final evaluation and scoring of the amended application resulting in a consensus rating for each major section. The review committee’s consensus rating of the NCP amended application was as follows:

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<sup>5</sup> Please see **Exhibit B** for a copy of the final MNPS review committee rubric.

<b>Sections</b>	<b>Rating</b>
Academic Plan Design and Capacity	PARTIALLY MEETS STANDARD
Operations Plan and Capacity	PARTIALLY MEETS STANDARD
Financial Plan and Capacity	PARTIALLY MEETS STANDARD

The State Board review committee recommended denial of the amended application for NCP because the Sponsor failed to provide sufficient evidence in the academic, operational, and financial sections of the application that meets the required criteria of the rubric.

The review committee found the academic plan partially meets the standard for approval. The academic plan’s strengths included the alignment of the mission and vision with an emphasis on social emotional learning, use of a standards-aligned continuous improvement model, a robust assessment cycle to inform personalized learning, and an innovative learning community model. However, the application did not demonstrate compelling evidence of interest from parents and families in the community to support NCP’s plan to open with 470 students in grades Kindergarten through five (5) in Year 1. In addition, the review committee noted that existing schools in the proposed community are under-enrolled, which created uncertainty that NCP will be able to meet its ambitious enrollment targets.

The review committee also found the operations plan partially meets the standard for approval. The NCP application contained strengths, including selecting Nobel Education Initiative (NEI), an experienced charter management organization (CMO), to manage the school’s daily operations. Additionally, in both the application and capacity interview, the Sponsor provided compelling evidence of support from businesses in the intended community. However, the governing board is currently composed of four (4) members, which raises concern regarding the applicant’s capacity to provide adequate oversight of the CMO’s operations. In addition, the review committee determined the operations plan did not provide a compelling recruitment and staffing plan to fulfill the proposed academic plan or a plan to fully align with state licensure requirements. Specifically, the Sponsor outlined a plan that all general education teachers would have an English as a Second Language endorsement to implement the proposed academic plan. Given the intent to open with 470 students in Year 1, the review committee had doubts that the plan supported the ability of the school to recruit and hire 22 dual-certified teachers.

Finally, the review committee determined the financial plan also partially meets the standard for approval. The financial plan’s strengths include a confirmed line of credit to support the school during its start-up year. However, the review committee found misalignment between the staffing plan proposed in the application and the positions allocated in the budget. Additionally, the review committee was concerned that the start-up and Year 1 revenue projections may not ensure the school is able to purchase all necessary equipment in time for the beginning of the school year. Furthermore, it was unclear if reductions included in the contingency budget would support the school’s continued operation.

For all of these reasons, the review committee determined that the application for NCP partially meets the standard in each of the required areas and, therefore, was unable to recommend approval of the NCP amended application. For additional information regarding the review committee’s evaluation of

the amended application, please see **Exhibit A** for the complete Review Committee Report, which is fully incorporated herein by reference.

- **Public Hearing**

Pursuant to statute<sup>6</sup> and State Board policy 2.500, a public hearing was held virtually on August 26, 2020. MNPS's presentation at the public hearing focused on the deficiencies found by the MNPS review committee in four (4) key areas: insufficient recruitment plan for English Learner (EL) and dually-certified teachers, inadequate instructional strategies for all learners, concerns regarding the size of the governing board, and lack of clarity around the management fee and staffing budget. Specifically, MNPS outlined concerns with the lack of a robust recruitment plan to hire EL and dually-certified teachers, noting that the application projects a high EL population of approximately 51% of students. Additionally, MNPS noted that it was unclear how EL students needing more intense supports would receive the required services. MNPS also argued that, although there were multiple instructional strategies listed, it was unclear how these strategies would work together to meet the needs of all learners. With regard to the operations plan, MNPS noted concerns about the small size of the governing board, which consisted of only three (3) members prior to the public hearing.<sup>7</sup> MNPS explained that given the plan to enroll 470 students for Year 1, the governing board would likely be heavily reliant and dependent upon the CMO. Finally, MNPS also listed concerns in regards to the financial section of the application. MNPS noted that the application listed a management fee ranging from 2-11% based on BEP revenue, but it was unclear how the percentages would change over time and how those changes would affect the budget. MNPS also noted concerns about the tight teacher-pupil ratio for grades 5-8 and how the contingency plan to reduce the number of lead teachers might impact students receiving needed supports in these grades. MNPS also presented information outlining what it deemed to be the financial impact of NCP on the district.

In response to MNPS, the Sponsor emphasized that the MNPS Board of Education has not voted to authorize a charter school in six (6) years, despite having 21 schools on the state's priority list. The Sponsor refuted the three (3) reasons for denial of the NCP amended application, as stated in the MNPS denial letter dated July 15, 2020. The first reason for denial was that the professional development model left out important details. The Sponsor stated that the MNPS amended application recommendation report does not mention concerns about the professional development model in the application, while the initial recommendation report included only a brief and unclear mention of professional development. The second reason for denial was that the recruitment plan for EL and dually-certified teachers lacked significant elements. The Sponsor noted that the rubric does not require a specific recruitment plan for EL teachers, and that the NCP application includes a comprehensive teacher recruitment plan that includes competitive salaries, merit increases, and access to a leadership program. The Sponsor argued these strategies would be implemented to recruit EL teachers as well as non-EL teachers. The third reason for denial was that instructional strategies for all learners lacked specific detail. The Sponsor noted that

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<sup>6</sup> T.C.A. § 49-13-108(b)(4).

<sup>7</sup> At the public hearing the Sponsor notified State Board staff that an additional board member had been added.

instructional strategies for special populations and EL students are included in detail in the application, including a table describing specific strategies and how they would be implemented.

In addition, the Sponsor noted that there were several items included in the MNPS amended application recommendation report that were not included in the MNPS initial application recommendation report. The Sponsor also argued that the areas of concern about finances were addressed in the amended application, and that fiscal impact of the school was not a listed reason for denial. Despite this, the Sponsor prepared a fiscal impact statement to demonstrate the minimal fiscal impact that NCP would have on MNPS. This statement posited that NCP would have a fiscal impact of approximately 0.55% of the entire MNPS budget in the first year of operation. Finally, in response to questions regarding the enrollment and student recruitment plan, the Sponsor pointed to numerous letters of support from the community, a plan to conduct neighborhood canvassing, and offering marketing materials to parents in multiple languages.

A portion of the public hearing was dedicated to taking public comment, which was read aloud by State Board staff. Four (4) public comments were received in support of the school. The State Board also provided a window for members of the public to submit written comments. The State Board received seven (7) additional written comments, all in support of the school.

- **Alignment of Metropolitan Nashville Public Schools' Application Process to State Board Quality Authorizing Standards**

State Board staff collected and analyzed information regarding MNPS's application review process to determine alignment with State Board Quality Authorizing Standards as set forth in State Board policy 6.111. At the public hearing, MNPS presented information regarding its application process and alignment to the Quality Authorizing Standards. MNPS articulated that they recruit and train internal and external experts to participate in the review committee, and host a capacity interview with the applicant to ensure a fair review. A review committee report is created based off this review and sent to the MNPS board of education for consideration.

While the review committee process outlined in by MNPS appears in alignment with State Board Quality Authorizing Standards, MNPS fell short in terms of the process employed after the review committee's report on the NCP application was presented to the board. T.C.A. § 49-1-108(a)(3) and State Board rules 0520-14-01-.01 and .02 require that a local board of education provide a written notification to the charter school sponsor of the objective reasons for denial of the application. The local board of education is required to file this written notification with the Department of Education and the Sponsor must submit copies of the letters notifying them of the reasons for denial to the State Board upon appeal. Additionally, State Board quality authorizing standard 2(b) requires that authorizers implement fair, transparent procedures that "communicates. . . approval criteria, and decisions clearly to the public" and "Informs applicants of their rights and responsibilities and promptly notifies applicants of approval or denial, while explaining the factors that determined the decision so that applicants can decide if they wish to revise their plans based in part on that information and resubmit in the future." Here, while MNPS did provide NCP with a letter outlining reasons for denial of the initial and amended applications, MNPS sought to assert additional reasons for denial not outlined in the letter provided to NCP upon denial of

the amended application. Specifically, at the public hearing, MNPS submitted evidence regarding the financial impact that NCP would have on MNPS if approved. While information regarding fiscal impact<sup>8</sup> of the school was discussed at the July 14 board meeting, it was not clearly listed as a reason for denial either in the motion to deny the school's application that was approved by the Board, the minutes of the board meeting, or in the letter provided to NCP after the board's vote.

As stated in the Quality Authorizing Standards, it is necessary to ensure a fair, transparent process, that an authorizer make the reasons for denial clear to the applicant so that they may revise and resubmit their application in the future, and so that all parties are aware of the reasons for denial should the school choose to appeal the local board's decision. I strongly urge MNPS to revisit its process to ensure that the board votes on a clear resolution regarding the specific, objective reasons for denial of the initial and amended applications, and that the letters notifying the Sponsor of those reasons clearly state all of the reasons for denial included in the board's resolution denying the application.

### **ANALYSIS**

State law requires the State Board to review the decision of the local board of education and determine whether the denial of the proposed charter school was contrary to the "best interests of the students, LEA, or community."<sup>9</sup> In addition, pursuant to T.C.A. § 49-13-108, the State Board adopted Quality Charter Authorizing Standards set forth in State Board policy 6.111 and utilizes these standards to review charter applications received upon appeal. One such standard is to maintain high but attainable standards for approving charter applications. In making my recommendation to the Board, I have considered the review committee's report, the documentation submitted by both the Sponsor and MNPS, the arguments made by both parties at the public hearing, and the public comments received by State Board staff and conclude as follows:

Given the great responsibility of educating students and the amount of public funds entrusted to a charter school that is approved by a local district, it has been the practice of the State Board that only those schools that have clearly demonstrated a high likelihood of success and meet or exceed the required criteria in all areas will be authorized. However, when analyzing the best interests of the students, the school district, and the community, there are sometimes significant factors outside of the Review Committee Report that are important to consider. In my review of the record, I did observe many notable strengths of the NCP application. I also recognize that the current pandemic has created even more urgency around families' access to quality options for their children, and while K-8 district schools in the NCP's target community are under capacity, they are also underperforming. As such, I am neutral with regard to whether or not the approval of the NCP application is in the best interests of the students, LEA, or community at this time. Therefore, I encourage the State Board to weigh the information presented in

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<sup>8</sup> While fiscal impact of the NCP application was discussed at the meeting, it does not appear that the board found "substantial negative fiscal impact" pursuant to T.C.A. 49-13-108(c) and State Board Rule 0520-14-01-.02. As such, a separate substantial negative fiscal impact analysis was not conducted pursuant to State Board Rule 0520-14-01-.02 and State Board policy 2.500.

<sup>9</sup> T.C.A. § 49-13-108.



this report and the record provided to Board members to determine if the approval of the NCP amended application is in the best interests of the students, school district, or community.

It is readily apparent that the Sponsor is passionate and committed to bringing a unique option to students in southeast Nashville and has aligned itself with a strong CMO partner in NEI. Furthermore, I recognize this Sponsor has made numerous improvements to its application over the past three (3) years in response to feedback from both MNPS and the State Board.

The academic section of the application has strengths, including a clear mission and vision with an emphasis on social emotional learning, use of a standards-aligned continuous improvement model, a robust assessment cycle to inform personalized learning, and an innovative learning community model. However, there are some concerns regarding whether the Sponsor was able to establish sufficient evidence of interest from parents and families in the community to support NCP's plan to open in school year 2021-22 with 470 students. While letters of support from businesses in the community were included in the application, the plan to open with 470 students less than a year from approval is ambitious. At the public hearing NCP was able to outline recruitment strategies it plans to undertake, including holding community discussions, neighborhood canvassing, community partnerships, offering marketing materials in multiple languages, and having bilingual staff available to answer questions. Additionally, the sponsor pointed to 115 signatures of support that have already been obtained, coupled with the board chair's affiliation with Trevecca Nazarene University which is located in the proposed community.

With regard to the operations plan, the NCP amended application states that in order to execute its proposed academic plan, the Sponsor would ensure that all general education teachers were dually-certified with an English as a Second Language (ESL) endorsement. Due to the school's plans to open with 470 students in Year 1, this means NCP will have to recruit and hire 22 dual-certified teachers before opening in August 2021. While the sponsor outlined a recruitment plan including merit and salary increases, it is unclear if this plan is sufficient to recruit the large number of dual-certified educators that would be needed to fulfill the plan, recognizing that there are already numerous vacancies for ESL certified teachers within MNPS. However, the Sponsor has outlined a plan to cover tuition costs necessary to have teachers gain an ESL endorsement, which may be helpful in recruiting the number of certified staff needed, and \$15,000 is allocated in the Year 1 budget for stipends and other expenses which could be used to cover some of this cost. Additionally, the review committee had concerns regarding the size of the governing board and the board's capacity to provide adequate oversight of the CMO's operations. However, during the public hearing the Sponsor announced that the governing board had added a fourth member from the identified school community, who is a former educator and parent. I recognize that while there are concerns regarding the size of the governing board, they have also partnered with an established CMO who has experience operating schools in the same community.

Finally, the financial plan outlined in the NCP application provided evidence of access to a confirmed line of credit to cover start-up costs. However, the financial plan contained misalignment between the staffing plan proposed in the application and the positions allocated in the budget. The review committee also had concerns about whether the start-up and Year 1 revenue projections will ensure the school is able to purchase all necessary equipment in time for the beginning of the school year. Specifically, the Sponsor plans to begin Year 1 with approximately \$30,000 cash on hand, but would still

need to purchase instructional materials, technology, and student equipment for use on the first day of school. However, the Sponsor noted during the public hearing that it will be eligible for and intends to apply for numerous grants upon approval, and did not include those grants in the budget as they wanted to establish they could make it work despite any potential grant dollars. I recognize that there is potential for this operator to apply for and receive charter school start-up grants which would result in an additional infusion of funds for start-up, if they were awarded a grant(s).

### CONCLUSION

For these reasons, and for the reasons stated in the Review Committee Report attached hereto as **Exhibit A**, I am neutral with regard to whether or not the approval of the Nashville Collegiate Prep application is in the best interests of the students, LEA, or community. Therefore, I encourage the State Board to weigh the information presented in this report and the record provided to Board members to determine if the approval of the NCP amended application is in the best interests of the students, school district, or community.



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Dr. Sara Morrison, Executive Director  
State Board of Education

9/16/2020

Date



EXHIBIT A

**Charter Application Review Committee Recommendation Report**

**September 14, 2020**

School Name: Nashville Collegiate Prep

Sponsor: ReThink Forward, Inc.

Proposed Location of School: Metropolitan Nashville Public Schools

Evaluation Team:

Scott Campbell  
Ashley Davis  
Catherine Johnson  
Kelly Kroneman  
Grant Monda  
Whitney O'Connell

This recommendation report is based on a template from the National Association of Charter School Authorizers.



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## Introduction

Tennessee Code Annotated (T.C.A.) § 49-13-108 allows the sponsor of a public charter school to appeal the denial of an application by the local board of education to the State Board of Education. In accordance with T.C.A. § 49-13-108, the State Board of Education shall conduct a de novo, on the record review of the proposed charter school's application, and the State Board of Education has adopted national and state authorizing standards. As laid out in State Board policy 6.200 - Core Authorizing Principles, the State Board is committed to implementing these authorizing standards that are aligned with the core principles of charter school authorizing, including setting high standards for the approval of charter schools in its portfolio.

In accordance with T.C.A. § 49-13-108, the State Board adopted State Board policy 6.111 - Quality Charter Authorizing Standards. The State Board has aligned the charter school appeal process to these high standards to ensure the well-being and interests of students are the fundamental value informing all State Board actions and decisions. The State Board publishes clear timelines and expectations for applicants, engages highly competent teams of internal and external evaluators to review all applications, and maintains rigorous criteria for approval of a charter school. Annually, the State Board evaluates its work to ensure its alignment to national and state standards for quality authorizing and implements improvement when necessary.

The State Board of Education's charter application review process is outlined in T.C.A. § 49-13-108, State Board policy 2.500 – Charter School Appeals, and State Board policy 6.300 – Application Review. The State Board assembled a charter application review committee comprised of highly qualified internal and external evaluators with relevant and diverse expertise to evaluate each application. The State Board provided training to all review committee members to ensure consistent standards and fair treatment of all applications.

## Overview of the Evaluation Process

The State Board of Education's charter application review committee developed this recommendation report based on three key stages of review:

1. **Evaluation of the Proposal**: The review committee independently reviewed the amended charter application, attachments, and budget submitted by the sponsor. After an independent review, the review committee collectively identified the main strengths, concerns, and weaknesses as well as developed specific questions for the applicant in the three sections of the application: Academic Plan Design and Capacity, Operations Plan and Capacity, and Financial Plan and Capacity.
2. **Capacity Interview**: Based on the independent and collective review of the application, the review committee conducted a 90-minute virtual interview with the sponsor, members of the proposed founding board, and identified school leader (if applicable) to address the concerns, weaknesses, and questions identified in the application, and to assess the capacity to execute the application's overall plan.

3. Consensus Judgment: At the conclusion of the review of the application and the capacity interview, the committee submitted a final rubric and developed a consensus regarding a rating for each section of the application.

This recommendation report includes the following information:

1. Summary of the application: A brief description of the applicant's proposed academic, operations, and financial plans.
2. Summary of the recommendation: A brief summary of the overall recommendation for the application.
3. Analysis of each section of the application: An analysis of the three sections of the application and the capacity of the team to execute the plan as described in the application.
  - a. Academic Plan Design and Capacity: school mission and goals; enrollment summary; school development; academic focus and plan; academic performance standards; high school graduation standards (if applicable); assessments; school schedule; special populations and at-risk students; school culture and discipline; marketing, recruitment, and enrollment; community involvement and parent engagement; and the capacity to implement the proposed plan.
  - b. Operations Plan and Capacity: governance; start-up plan; facilities; personnel/human capital; professional development; insurance; transportation (if applicable); food service; additional operations (if applicable); waivers; and the capacity to implement the proposed plan.
  - c. Financial Plan and Capacity: budget narrative; budget; cash flow projections; related assumptions; financial policies and procedures; and the capacity to implement the proposed plan.

The State Board's charter application review committee utilized the Tennessee Department of Education's Charter School Application Evaluation Ratings and Sample Scoring Criteria (the rubric), which is used by all local boards of education when evaluating an application. The rubric states:

An application that merits a recommendation for approval should present a clear, realistic picture of how the school expects to operate; be detailed in how this school will raise student achievement; and inspire confidence in the applicant's capacity to successfully implement the proposed academic and operational plans. In addition to meeting the criteria that are specific to that section, each part of the proposal should align with the overall mission, budget, and goals of the application.

The evaluators used the following criteria and guidance from the scoring rubric to rate applications:

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



## Summary of the Application

School Name: Nashville Collegiate Prep

Sponsor: ReThink Forward, Inc.

Proposed Location of School: Metropolitan Nashville Public Schools (MNPS)

Mission:<sup>1</sup> The mission of Nashville Collegiate Prep (NCP) is to provide a personalized, engaged, supported, and challenging environment that will strengthen students academically, socially, and emotionally. Students will leave NCP with the skills and mindset necessary to not only face reality but create improvements for the next generation.

Number of Schools Currently in Operation by Sponsor: 0

Proposed Enrollment:<sup>2</sup>

Grade Level	Year 1 (2021)	Year 2 (2022)	Year 3 (2023)	Year 4 (2024)	Year 5 (2025)	Year 6 – At Capacity (2026)
K	80	100	100	100	100	100
1	80	80	100	100	100	100
2	80	80	80	100	100	100
3	80	80	80	80	100	100
4	75	75	75	75	75	100
5	75	75	75	75	75	75
6	0	75	75	75	75	75
7	0	0	60	60	60	60
8	0	0	0	60	60	60
<b>Total</b>	<b>470</b>	<b>565</b>	<b>645</b>	<b>725</b>	<b>745</b>	<b>770</b>

### Brief Description of the Application:

The sponsor, ReThink Forward, Inc., is proposing to open a combined elementary and middle school in the southeast area of Nashville<sup>3</sup> to serve students in grades K through 8. Nashville Collegiate Prep (NCP) is a new-start school and plans to utilize a continuous improvement model infused with social emotional learning within a learning community structure to offer a unique option that instills in students the skills and mindset necessary to face reality and create improvements for the next generation.<sup>4</sup>

The proposed school would be organized under the existing non-profit entity, ReThink Forward, Inc. The applicant projects the school will have \$300,000 in revenue and \$270,011 in expenses in Year 0, resulting in a positive ending balance of \$29,989. In Year 1, the applicant projects the school will have

<sup>1</sup> Nashville Collegiate Prep amended application, pg. 4.

<sup>2</sup> Ibid. pg. 15.

<sup>3</sup> Ibid. pg. 6.

<sup>4</sup> Ibid. pg. 6-7.





\$5,504,593 in revenue and \$5,378,248 in expenses, resulting in a net income of \$126,345 and a positive ending fund balance of \$156,334. By Year 5, the school projects to have \$8,951,304 in revenue and \$8,629,200 in expenses, resulting in a net income of \$322,104 and a positive ending fund balance of \$1,478,298.<sup>5</sup> The school anticipates that 40% of the student population will qualify as economically disadvantaged, 9% will be students with disabilities, and 51% will be English Learners (ELs).<sup>6</sup>

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<sup>5</sup> Ibid. Attachment O-Planning and Budget Worksheet.

<sup>6</sup> Ibid. pg. 15.

## Summary of the Evaluation

The review committee recommends denial of the application for NCP because the applicant failed to provide sufficient evidence in the academic, operational, and financial sections that the application meets the required criteria of the rubric.

The academic plan partially meets the standard for approval. The academic plan's strengths included the alignment of the mission and vision throughout the academic plan with an emphasis on social emotional learning, use of a continuous improvement model aligned to Tennessee academic standards, a robust assessment cycle to inform personalized learning, and an innovative learning community model. However, the application did not demonstrate clear and compelling evidence of interest from parents and families in the community to support NCP's ambitious opening enrollment projections. This, combined with the fact that the existing schools in the proposed community are under-enrolled, builds upon the lack of evidence that the school will be able to successfully enroll 470 students in Year 1.

The operations plan also partially meets the standard for approval. The applicant presented evidence of some strengths, including selecting Nobel Education Initiative (NEI), an experienced charter management organization (CMO), to manage the school's daily operations. Additionally, in both the application and capacity interview, the applicant provided compelling evidence of support from businesses in the intended community. However, the governing board is currently composed of four members, which raises concern regarding the applicant's capacity to provide adequate oversight of the CMO's operations. In addition, the application lacks a clear and compelling recruitment and staff planning to fulfill the proposed academic plan or a plan to fully align with state licensure requirements.

Further, the financial plan partially meets the standard for approval. The financial plan's strengths include a confirmed line of credit to support the school during its start-up year. However, there is misalignment between the staffing plan proposed in the application and the positions allocated in the budget. Additionally, there is a lack of evidence that the start-up and Year 1 revenue projections will ensure the school is able to purchase all necessary equipment in time for the beginning of the school year. Furthermore, the contingency budget provided by the applicant, should the school not meet its enrollment targets, included reductions to overhead costs such as custodial, maintenance, and rent without any evidence to support that these cuts would be allowable by the companies they are contracting with or that the school would be able to successfully continue operation with fewer of these services in the event of enrollment shortfalls.

For all of these reasons, the review committee determined that the application for NCP partially meets the standard for each of the application's sections and, therefore, is unable to recommend approval of the application.

### Summary of Section Ratings

In accordance with the Tennessee Department of Education's charter application scoring rubric, "applications that do not meet or exceed standard in every area...will be deemed not ready for approval,"<sup>7</sup> and strengths in one area of the application do not negate material weaknesses in other areas. Opening

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<sup>7</sup> Tennessee Charter School Application Rubric – Evaluation Ratings and Sample Scoring Criteria, pg. 1.



and maintaining a successful, high-performing charter school depends on having a complete, coherent plan and identifying highly capable individuals to execute that plan. The review committee’s consensus rating for each section of the application are as follows:

<b>Sections</b>	<b>Rating</b>
Academic Plan Design and Capacity	Partially Meets Standard
Operations Plan and Capacity	Partially Meets Standard
Financial Plan and Capacity	Partially Meets Standard

## **Analysis of the Academic Plan Design and Capacity**

*Rating: Partially Meets Standard*

### **Weaknesses Identified by the Committee:**

The applicant's Academic Plan Design and Capacity partially meets standard because there is a lack of sufficient evidence of interest from families within the proposed community to support the school's robust Year 1 enrollment target.

The application presented limited evidence of interest in the school among families within the intended community. The applicant proposes to open in Year 1 serving grades kindergarten through 5 with 470 students. This is an ambitious Year 1 target for any charter school, particularly an applicant with no current schools in operation. In the application and in the capacity interview, the applicant referenced evidence of parent and family demand in the school based on a survey with 60 family respondents. However, it is not clear from the survey evidence when the survey was administered, if the results would translate into those students enrolling in the proposed school, or if there is interest beyond the survey results.

Moreover, although the applicant presented a strong case for the need for high-performing schools in the Southeast area of Nashville based on the zoned schools' academic performance, the applicant also noted that these schools are under-enrolled, which compounds the need for a strong and detailed marketing and recruitment plan to ensure the school meets its enrollment projections in Year 1. The review committee acknowledges the efforts the applicant has made to advertise the school and recruit families since submitting the initial application, including the use of a full-time engagement analyst from NEI living and working near the intended community, being present at community and church events, and engaging directly with families through in-person marketing across several apartment complexes. While these efforts display intentional and persistent engagement with the community, there is as yet insufficient evidence that there is enough interest among the families in the community to ensure that NCP will meet its ambitious Year 1 enrollment target.

In totality, these concerns led the review committee to rate NCP's academic plan as partially meets standard.

### **Strengths Identified by the Committee:**

While the Academic Plan Design and Capacity partially meets standard because of the weaknesses described above, the review committee did find evidence of strengths within the section. Specifically, the applicant outlined a compelling mission and vision for the school that was reflected throughout the application through a focus on social emotional learning and restorative justice practices. In addition, the applicant outlined a comprehensive continuous improvement model which focuses heavily on alignment of instructional materials and activities to the Tennessee Academic Standards and the use of a robust multi-level assessment cycle to inform data-driven personalized instruction. Finally, the applicant proposes an innovative learning community model which presents a unique schooling option for the community. It is evident that the applicant is passionate about providing a high-quality charter option that will meet the unique needs of this community.

## Analysis of the Operations Plan and Capacity

*Rating: Partially Meets Standard*

### **Weaknesses Identified by the Committee:**

The applicant's Operations Plan and Capacity partially meets standard because of the limited capacity of the governing board to provide oversight to the CMO, the lack of evidence that the compensation plan will be competitive to attract and retain high-quality teachers and administrators, and the lack of alignment of the staffing plan to state licensure requirements.

First, there was a lack of evidence that the governing board will have the capacity to ensure effective governance or meaningful oversight. The governing board is currently comprised of four (4) members, with three (3) members from the Nashville community and one (1) member from outside Tennessee. The fourth member of the governing board was added during this charter school appeal cycle, so the review committee was not provided evidence regarding this member's qualifications nor was this member involved in the development of the school's application. While the governing board has a good-faith agreement with its charter management organization, NEI, to carry out the academic and operational plans, the small size of the governing board and the board's limited experience with operating K-12 schools fails to provide evidence of the board's capacity to manage its CMO and provide the oversight necessary to launch and operate a successful charter school. Further, the board did not provide a plan or timeline for the recruitment and orientation of additional members.

Second, the applicant lacks a clear and compelling recruitment, hiring, and compensation plan to meet its robust staffing plan. First, the applicant projects 51% of its student population will be ELs, and the proposed academic plan relies on all teachers, 22 in Year 1, being English as a Second Language (ESL) endorsed so as to meet the service needs of ELs within the flexible groupings plans of the school.<sup>8</sup> However, the applicant does not include a robust plan for recruiting these individuals, particularly knowing that finding ESL endorsed teachers is extremely difficult. When asked in the capacity interview about their recruitment plan for ESL endorsed teachers, the applicant stated that they plan to provide support for teachers to gain their ESL endorsement through a partnership with a local college or university such as Trevecca Nazarene University, and the applicant would pay for the tuition costs through the stipend budget of the school. However, the applicant did not include any funding for the stipends in Year 0, when the teachers would need to be completing their classwork for the ESL endorsement, and in Year 1, the applicant only budgeted \$15,000 for stipends, which would only cover a few teachers' tuitions.

Moreover, NCP's recruitment and compensation plan does not provide a clear pathway for the hiring of high-quality teachers and administrators. Given the known shortage of teachers in the Nashville area, NCP's compensation plan is not likely to attract and retain the number of professional staff needed to sustain the school's academic model. NCP's staffing model proposes to pay teachers a starting salary of \$46,000. For comparison, MNPS's starting salary is \$45,964.95. When asked during the capacity interview how the school would compensate lead teachers beyond the starting salary of \$46,000, the applicant stated that the \$15,000 stipend budget would be used to provide additional funds for those roles. However, as noted above, the applicant also intends to use the stipend budget to cover tuition costs

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<sup>8</sup> Nashville Collegiate Prep amended application, pg. 97

for teachers. Although the application emphasizes the impact and importance that high-quality teachers have on student growth, the proposed recruitment, hiring, and compensation plan lacks evidence that it would deliver high-quality and experienced staff to carry out the academic model.

Finally, portions of the staffing plan did not align with state licensure requirements. In the requested waivers, the applicant stated that the school wanted a waiver from the requirement that elective teachers be certified. The applicant stated it planned to have uncertified volunteers teach the elective courses, physical education and fine arts, and that the principal would oversee the courses. In most cases, a waiver of teacher licensure is not allowable under state law nor is it a permanent solution. Moreover, the applicant also requested a waiver from having a licensed principal. It is not clear if the applicant wants to waive the administrator license requirement (which is allowable), the educator license requirement (which is not permissible), or both for the principal, but in totality, there is a lack of evidence that the applicant fully understands the licensure requirements under state law.

The lack of evidence regarding the capacity of the governing board to oversee the management of the school paired with an unclear plan to recruit and retain a high-quality and experienced staff, as well as a lack of alignment with state licensure requirements led the review committee to rate NCP's operations plan as partially meets standard.

**Strengths Identified by the Committee:**

While the Operations Plan and Capacity partially meets standard because of the weaknesses described above, the review committee did find evidence of strengths within the section. Specifically, ReThink Forward's decision to contract with a CMO that currently operates numerous schools across the country and has the capacity to manage the operations for NCP is a strength of the application. In addition, the applicant shared during the capacity interview that all staff members of NCP would be employees of ReThink Forward, rather than NEI, thus allowing NCP to operate independently from the CMO if the board ever needs to sever their agreement. Finally, the applicant provided numerous examples of support in the application from businesses within the intended community and identified several other community businesses and organizations with which they would like to develop partnerships during the capacity interview.

## **Analysis of the Financial Plan and Capacity**

*Rating: Partially Meets Standard*

### **Weaknesses Identified by the Committee:**

The Financial Plan and Capacity partially meets the standard because the budget presented is misaligned with the proposed staffing plan, insufficient funds are allocated to necessary pre-opening expenditures, and the contingency plan provided by the applicant included reductions to necessary budget items. Each of these concerns amounted to a lack of compelling evidence of a sound financial plan for the school.

First, the applicant's budget does not account for several staffing and recruiting efforts named in the academic and operations plan for the school. NCP's organization chart includes a certified special education (SPED) coordinator and EL coordinator, yet there is no funding budgeted for the SPED coordinator position through Year 5, and the EL coordinator position is absent from the budget entirely. The applicant provided clarification on this during the capacity interview, stating that there would be a combined SPED/EL coordinator in Year 1 and that they would revisit the position in Year 2 if there was a need for additional support. The applicant indicated that this position was accounted for in the Year 1 budget in the "Other" administrative staff field at a compensation rate of \$45,000, however, the assumption notes for this line item lists the position as the School Business Manager. There is a lack of clarity in the budget for how this critical position will be funded. Additionally, as noted in the operations plan, the review committee found that the proposed stipend budget of \$15,000 in Year 1 was insufficient given the numerous plans for the line item including stipends for lead teachers, coaches, and covering tuition costs for employees.

Additionally, the applicant's budget lacked sufficient funds to cover necessary pre-opening expenditures such that the school would successfully open. The Year 0 budget presented in the application includes computers and office supplies for start-up staff and rent for a start-up office space while other instructional materials and technology are pushed to the Year 1 budget. The school plans to begin Year 1 with approximately \$30,000 in revenue, but would still need to purchase textbooks, instructional supplies, education software, student laptops, and furniture for the school to successfully open. The budgeted expenses for the necessary equipment to open the school do not align with the school's projected cash flow which notes BEP payments and federal reimbursements not coming in until August 15<sup>th</sup> at the earliest. Since the expected amount of cash on-hand beginning Year 1 is insufficient to cover the anticipated payments for instructional materials and equipment, there is a lack of evidence of how the school will successfully begin Year 1 ready to welcome students.

Finally, the applicant provided a contingency budget based on possible enrollment shortfalls that included reductions to line items that are necessary to the operation of the school. The applicant lists line items including rent, custodial, maintenance, and internet/network at reduced amounts for two different thresholds of under-enrollment. The facility costs assumed in the budget are based on per-student enrollment, but there was not evidence that rent would be reduced if enrollment dropped. Given the necessity of these items to the management of the school facility, and the applicant's ambitious Year 1 enrollment target, there is a lack of evidence that the contingency budget is a viable plan to ensure the continued operation of the school.

In totality, the plan provided in the financial section of the application does not meet the standard explicitly stated in the rubric.



**Strengths Identified by the Committee:**

While the Financial Plan and Capacity partially meets standard because of the weaknesses described above, the review committee did find evidence of strengths within the section. The application stated that the school has access to a \$300,000 open line of credit during Year 0 to meet its start-up costs. During the capacity interview, the applicant also discussed the development team's capacity to secure additional grants nationwide.





## Evaluation Team

**Scott Campbell** is the Executive Director of Persist Nashville, a 501c3 non-profit that empowers Nashville students to earn a college degree. Persist Nashville Inc. currently coaches over 400 Nashville college students. Previous to starting Persist Nashville, Scott was the Principal of RePublic High School in Nashville, TN. At RePublic he led his school to a Bronze Medal ranking by the US News and World Report as one of the top 6 schools in Nashville and improved ACT average by 4.42 points. Previous to RePublic, Scott worked at Valor Collegiate Academies and was the Assistant Principal at Thomas Jefferson High School for Science and Technology in Alexandria, VA. Scott spent 10 years in the classroom teaching, coaching, and leading. He received his M.S. in Secondary Education and B.A. in Political Science from the University of Tennessee and Ed.S. in Educational Leadership and Administration from The George Washington University.

**Ashley Davis** is an Educational Consultant and provides instructional support to charter schools and nonprofits in Memphis. She most recently served as the Residency Director for the Relay Graduate School of Education where she worked in partnership with numerous schools and networks across Memphis to coach and develop Teacher Residents. Prior to joining Relay, she served as a Lead Teacher and later as Principal at Memphis College Prep. Ashley received a dual Bachelor of Arts in Communication and English from the University of Pennsylvania and a Master of Science in Digital Media from Columbia University.

**Catherine Johnson** serves as the Policy Coordinator for the Tennessee State Board of Education. In this role, she coordinates the review and revision process of the state academic standards as well as supporting the review process of all board items, policies, and rules. Prior to joining the State Board staff, Catherine was an 8<sup>th</sup> grade social studies teacher in Nashville at Apollo Middle School as a 2016 Teach for American Corps Member and then LEAD Southeast Middle School. Catherine has a Bachelor of Science in Secondary Social Studies Education and a Master of Arts in Educational Theory and Policy from Pennsylvania State University.

**Kelly Kroneman** serves as the Coordinator of Special Populations and Operations for the Tennessee State Board of Education. In this role, she supports the State Board in carrying out its charter authorization duties and charter appeals process. Kelly has enjoyed working with and for students in different capacities, including as a research assistant for a federally-funded special education intervention project at Vanderbilt University and as a first grade teacher in Richmond, Virginia. Kelly graduated from James Madison University with a Bachelor of Science in Interdisciplinary Liberal Studies with a focus in Elementary Education and Women and Gender Studies, and holds a professional teaching license for grades pre-K through 6 in Virginia. Kelly has two graduate degrees: a Master of Arts in Teaching in Elementary Education from James Madison University and a Master of Public Policy in Education Policy from Vanderbilt University. She is passionate about supporting school leaders and teachers in prioritizing the needs of at-risk students to improve educational equity for all.

**Grant Monda** is in his sixth year with Aurora Collegiate Academy, currently serving as its Executive Director. Aurora is a tuition- free public charter elementary school serving students from all over Shelby County. Grant joined Aurora after completing the prestigious Ryan Fellowship in 2015. In addition to his



work at Aurora, Grant has previously taught in Memphis City Schools as a Teacher For America Corps member and served as a district level coach and evaluator with Shelby County Schools. Grant has reviewed charter applications for the state and Shelby County Schools. He holds a Bachelor of Arts degree from Rhodes College and a Master's in Education from Christian Brothers University.

**Whitney O'Connell** is currently working as a Schools Implementation Manager for EVERFI in Manhattan and as a curriculum consultant for Mosa Mack Science and the Big History Project. She has 5 years of teaching experience in a variety of schools, most recently at Explore! Community School in East Nashville. Prior to working at Explore!, Whitney acted as an intern at the International Bureau of Education (UNESCO) in Geneva, Switzerland collaborating on projects with the Malaysian Ministry of Education regarding gender-responsive STEM education. She was previously a corps member in Teach For America acting as a kindergarten teacher in Connell, Washington and has taught early childhood education internationally in Peña Blanca, Honduras. Ms. O'Connell earned her B.A. at Gustavus Adolphus College in Spanish and History and her M.Ed. at University of Washington in Curriculum and Instruction.

## EXHIBIT B



### TENNESSEE CHARTER SCHOOL APPLICATION EVALUATION RATINGS AND SAMPLE SCORING CRITERIA

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#### Ratings and Criteria

State law requires the Tennessee Department of Education to provide “a standard application format,” T.C.A. 49-13-116, and “sample scoring criteria addressing the elements of the charter school application specified in the Tennessee Public Charter Schools Act of 2002,” SBE Rule 0520-14-01-.01(2).

Evaluators will use the following criteria to rate applications. Within each subsection, specific criteria define the expectations for a well thought out response that “Meets the Standard.” Evaluators will rate the responses by applying the following guidance:

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

An application that merits a recommendation for approval should present a clear, realistic picture of how the school expects to operate; be detailed in how this school will raise student achievement; and inspire confidence in the applicant’s capacity to successfully implement the proposed academic and operational plans. In addition to meeting the criteria that are specific to that section, each part of the proposal should align with the overall mission, budget, and goals of the application.

Recommendations for approval or denial will be based on the written application (narrative and attachments), independent due diligence, and, if offered by the authorizer, applicant interviews.

Applications that do not meet or exceed the standard in all sections (academic plan, operations plan, financial plan, and, if applicable, past performance), as evidenced by the summary review ratings, and applications that do not meet or exceed any additional LEA requirements will be deemed not ready for approval. Tennessee law states, “The approval by the chartering authority of a public charter school application shall be in the form of a written agreement signed by the sponsor and the chartering authority, which shall be binding upon the governing body of the public charter school. The charter agreement . . .

shall be in writing and contain all components of the application.” T.C.A. § 49-13-110(a). Thus, an initial or amended charter application, to be approved, must be ready to be incorporated into a charter agreement.

#### **INSTRUCTIONS TO REVIEWERS**

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

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

“The plan aligns with the overall mission and vision because . . .”

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

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

“The curriculum and daily schedule do not align with the mission and vision because . . .”

“The discipline plan does not include provisions for students with disabilities.”

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

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

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

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

“The governing board is composed of only two people who do not have sufficient credentials to support school leadership.”

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

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

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

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

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

“The budget assumptions include a line of credit from XYZ bank, but there is no proof such an agreement exists, and no plan to repay the line of credit when it is accessed.”

“The proposed school assumes two buses in the first year, but there is no accompanying line item in the budget that allocates funds for purchasing buses nor is there any indication of salary and training for bus drivers.”

**Step by step instructions for evaluators**

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

APPLICANT TYPE	DESCRIPTION	REQUIRED SECTIONS
New-Start Applicant	Operator with no existing schools	<ul style="list-style-type: none"> <li>• Academic Plan Design and Capacity: <b>1.1 through 1.12</b></li> <li>• Operations Plan and Capacity: <b>2.1 through 2.10</b></li> <li>• Financial Plan and Capacity: <b>3.1 and 3.2</b></li> </ul>
Existing Tennessee Operator Proposing New Focus/Grade Structure	Operator with existing schools in Tennessee proposing to change their focus and/or grade structure	<ul style="list-style-type: none"> <li>• Academic Plan Design and Capacity: <b>1.1 through 1.14</b></li> <li>• Operations Plan and Capacity: <b>2.1 through 2.16</b></li> <li>• Financial Plan and Capacity: <b>3.1 through 3.3</b></li> <li>• Portfolio Review and Performance Record: <b>4.1</b></li> </ul>
OR Existing non-Tennessee operator	OR Operator with existing schools outside of Tennessee	
Existing Tennessee Operator Proposing Exact Focus/Grade Structure	Operator with existing schools in Tennessee proposing no change in focus or grade structure	<ul style="list-style-type: none"> <li>• <b>Submit original application</b></li> <li>• Academic Plan Design and Capacity: <b>1.2, 1.12, 1.13, and 1.14</b></li> <li>• Operations Plan and Capacity: <b>2.11. through 2.16</b></li> <li>• Financial Plan and Capacity: <b>3.4</b></li> <li>• Portfolio Review and Performance Record: <b>4.1</b></li> </ul>

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

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

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Evaluator Name:

Proposed School Name:

Application includes an Executive Summary.

Yes

No

**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.1 SCHOOL MISSION AND VISION</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ The mission statement defines the purpose of the proposed charter school.</li> <li>▪ The mission statement is clear, concise, compelling and measurable.</li> <li>▪ The vision provides a coherent description of what the school will look like when it is achieving its mission.</li> </ul>		
<b>Initial Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<b>Strengths</b>		<b>Page</b>
<b>Concerns/Questions</b>		<b>Page</b>
<b>Final Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<b>Strengths</b>		<b>Page</b>
<b>Concerns/Questions</b>		<b>Page</b>

**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.2 ENROLLMENT SUMMARY</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ A clear description of the community where school intends to draw students including school zones and academic performance of surrounding schools.</li> <li>▪ Rationale for selecting the community where school will locate and description of how the school will serve as a needed alternative.</li> <li>▪ Completed enrollment summary and anticipated demographics charts with reasonable enrollment projections.</li> </ul>		
<b>Initial Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<b>Strengths</b>		<b>Page</b>
<b>Concerns/Questions</b>		<b>Page</b>
<b>Final Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<b>Strengths</b>		<b>Page</b>
<b>Concerns/Questions</b>		<b>Page</b>



**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.3 ACADEMIC FOCUS AND PLAN</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ A clear and comprehensive explanation of the school's academic focus that is aligned with the school's mission and vision.</li> <li>▪ A framework for a rigorous research based academic plan that reflects the needs of the targeted student population and is aligned with the school's stated mission and vision.</li> <li>▪ A robust and quality curriculum overview, supported by research, with a plan for implementation that includes all grades the school will eventually include.</li> <li>▪ Evidence the curriculum design is aligned with the Tennessee State Standards.</li> <li>▪ Evidence the proposed academic plan will be appropriate and effective for growing all students while at the same time closing achievement gaps.</li> <li>▪ A description of effective methods for providing differentiated instruction to meet the needs of all students, including a strong plan for Response to Instruction and Intervention (RTI<sup>2</sup>) that aligns with Tennessee guidelines.</li> <li>▪ If including blended learning, a clear explanation of the model the school will use and the role of teachers within the blended learning environment.</li> </ul>		
<b>Initial Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<b>Strengths</b>		<b>Page</b>
<b>Concerns/Questions</b>		<b>Page</b>
<b>Final Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<b>Strengths</b>		<b>Page</b>
<b>Concerns/Questions</b>		<b>Page</b>

**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.4 ACADEMIC PERFORMANCE STANDARDS</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Academic achievement goals are rigorous, measurable, and realistic and set high standards and high expectations for student learning.</li> <li>▪ Academic goals contribute to the stated mission and vision of the school.</li> <li>▪ Clear and compelling process for setting, monitoring, and / or revising academic achievement goals.</li> <li>▪ Evidence of clear, rigorous promotion/retention and exit policies and standards.</li> <li>▪ Appropriate, well-defined corrective action plan if school falls below state and/or district academic achievement expectations.</li> <li>▪ A clear description of the school's approach to help remediate students' academic underperformance based on assessment and other data, and evidence the chosen approach will result in improved academic achievement.</li> <li>▪ Student attendance goals are realistic and plans to ensure high rates of student attendance and address chronic absenteeism are clearly outlined.</li> </ul>		
<b>Initial Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<b>Strengths</b>		<b>Page</b>
<b>Concerns/Questions</b>		<b>Page</b>
<b>Final Application Review</b>		
<input type="checkbox"/> Meets or Exceeds Standard	<input type="checkbox"/> Partially Meets Standard	<input type="checkbox"/> Does Not Meet Standard
<b>Strengths</b>		<b>Page</b>
<b>Concerns/Questions</b>		<b>Page</b>

**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

**1.5 PHASE-IN/TURNAROUND – IF APPLICABLE**

Characteristics of a strong response:

- Inclusion of strong prior experience in turning around or converting an underperforming school or plan for doing so if the organization does not have prior experience.
- A clear explanation for how the organization will engage with the neighborhood, community, and student population prior to conversion.
- Specific ways to engage and transform the existing school culture and how the organization will determine what aspects of school culture to keep, modify, or add.
- If proposing a phase-in approach, the organization clearly describes how transition to a shared campus will occur with regard to campus collaboration and building-wide issues.
- If proposing a full school take-over approach, the organization has a clear plan for communicating with existing staff and a comprehensive plan for needed additional support to ensure student success.

**Initial Application Review**

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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.6 HIGH SCHOOL GRADUATION AND POSTSECONDARY READINESS – IF APPLICABLE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Plan for meeting the Tennessee Graduation Requirements (including credits, transcripts, electives, GPA calculation) and compelling explanation of any additional requirements beyond the State’s requirements.</li> <li>▪ Clear, persuasive explanation of how the school’s graduation requirements will ensure student readiness for college or other postsecondary opportunities, including trade school, military service, or entering the workforce).</li> <li>▪ Effective systems and structures for students at risk of dropping out or not meeting graduation requirements.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.7 ASSESSMENTS</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Assessment selection will provide sufficiently rich data for evaluation of the academic program and align with state standards.</li> <li>▪ Assessment plan details the collection and analysis of individual students, student cohorts, and school level performance throughout the school year, at the end of the academic year and for the term of the charter.</li> <li>▪ A process for using data to support instruction is clearly articulated, with detailed plans presented to provide adequate training for teachers and school leaders.</li> <li>▪ Demonstrates an understating of the obligation under state law to participate in the statewide system of assessments and accountability.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.8 SCHOOL CALENDAR AND SCHEDULE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ School calendar (<b>Attachment A</b>) and student schedules meet Tennessee minimum requirements of the equivalent of 180 days of instruction.</li> <li>▪ Calendar and schedule support implementation of the academic plan and align with stated mission and vision.</li> <li>▪ Description of a typical day for teachers and students align with key priorities of the academic plan and the overall mission and vision for the school.</li> <li>▪ If proposing Saturday School, summer school, or after school programming, a description of programming is included</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.9 SPECIAL POPULATIONS AND AT-RISK STUDENTS</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ An identified founding school team member with experience working with special populations.</li> <li>▪ Clear process for identifying students with disabilities, English Language Learners, and at-risk students, and gifted students.</li> <li>▪ Clear description of RTI<sup>2</sup> procedures, including a plan for how data will be collected, progress will be monitored, and instructional decisions made related to student performance</li> <li>▪ A viable plan to provide students with special needs with instructional programs, practices, and strategies that ensure access to the general education curriculum and academic success.</li> <li>▪ Requirements and processes for monitoring services to students in need and plans to exit students that attain sufficient progress.</li> <li>▪ An understanding of, and capacity to fulfill, State and federal obligations and requirements pertaining to students with disabilities and English Language Learners.</li> <li>▪ A realistic plan for hiring licensed and highly qualified personnel including service providers, nursing, and educational assistants.</li> <li>▪ Evidence of adequate resources and staff to meet the needs of all students, including professional development for teachers.</li> <li>▪ Articulated plan for how the school will utilize and evaluate data to inform instruction and evaluate academic progress for students with disabilities, English learners, at-risk students, and gifted students.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.10 SCHOOL CULTURE AND DISCIPLINE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ A clear vision for school culture or ethos that will promote a positive academic environment and will reflect high levels of academic expectation and support.</li> <li>▪ Coherent plan for creating and sustaining the intended culture for students, teachers, administrators, and parents from the school's inception, and for integrating new students and families as they arrive.</li> <li>▪ Plan for how school culture will embrace students with special needs.</li> <li>▪ Student discipline policy (<b>Attachment B</b>) that provides for effective strategies to support a safe, orderly school climate and strong school culture while respecting student rights.</li> <li>▪ Evidence of legally sound discipline policies that outline discipline procedures, suspension, and expulsion procedures and appeals processes.</li> <li>▪ If not included as part of school handbook (<b>Attachment B</b>), inclusion of student discipline policy (<b>Attachment C</b>)</li> <li>▪ Thoughtful consideration of how the discipline policies protect the rights of students with disabilities..</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.11 MARKETING, RECRUITMENT, AND ENROLLMENT</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Articulated student recruitment and marketing plan, timeline, and enrollment policy that will provide equal access to all interested students and families, including those in poverty, academically low-achieving students, students with disabilities, and English Language Learners.</li> <li>▪ Enrollment policy (<b>Attachment D</b>) that complies with state law and district policies.</li> <li>▪ Compelling student outreach plan that includes community, family, and student involvement, and that is realistic and likely to foster student retention and community support.</li> <li>▪ Description of existing community resources and partnerships already formed that will benefit students and parents and that include a description of the nature, purposes, terms, and scope of services of any such partnerships; and evidence of commitment from identified community partners including documentation of pledged support (Attachment E), if available.</li> <li>▪ Letters of support, MOUs, or contracts (<b>Attachment E</b>) to show proposed school is welcomed by the community.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.12 COMMUNITY INVOLVEMENT AND PARENT ENGAGEMENT</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Plan for student recruitment after school has opened.</li> <li>▪ A sound and compelling plan for engaging parents and community partners in the design and life of the school.</li> <li>▪ Clear plan for informing and educating parents on school policies.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.13 EXISTING ACADEMIC PLAN (FOR EXISTING OPERATORS)</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Key features of the existing academic plan that will significantly differ from the operator's existing schools (if any).</li> <li>▪ Clear, concise rationale for any academic program variance that includes implementation strategies, resources needed, and expected outcomes.</li> </ul>		
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**SECTION 1 ACADEMIC PLAN DESIGN AND CAPACITY**

<b>1.14 PERFORMANCE MANAGEMENT (FOR EXISTING OPERATORS)</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Clear description of any mission-specific goals and targets the organization will have, with measures and/or assessments fully described and a rationale for their choices.</li> <li>▪ Clear and compelling explanation of how the organization will measure its academic progress – individual students, student cohorts, all grade levels within a school and across the network of schools.</li> <li>▪ Appropriate, well-defined corrective action plan if one school, student cohort, or entire network of schools falls below state and/or district academic achievement expectations.</li> <li>▪ Clear and concise contingency plans that describe in great detail how the organization will react in the event academic targets are not met, and how the organization will react to adversity through delayed or modified growth.</li> <li>▪ Plans for how the organization will assess its readiness to grow and under what circumstances the organization will delay or modify its growth plan.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.1 GOVERNANCE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Strong understanding of the roles and responsibilities of a governing board including structure, size, powers, duties, and expertise that aligns with the school's mission and vision.</li> <li>▪ Proposed structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and financials.</li> <li>▪ Evidence the proposed board members will contribute the wide range of knowledge, skills, and commitment needed to oversee a successful charter school, including but not limited to educational, financial, legal, and community experience and expertise.</li> <li>▪ Plans for meaningful board training as required by law.</li> <li>▪ If applicable, a timely plan for creating or transitioning from a founding board to a school governing board.</li> <li>▪ Clear, compelling plans to ensure parents have access to the governing board, including a process for complaints that is fair, transparent and a plan for communicating the process.</li> <li>▪ Sound plan and timeline for board recruitment, expansion and orientation of new members.</li> <li>▪ Governance documents (<b>Attachments F1-F7</b>) are complete and align with state laws and district policies.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.2 START-UP PLAN</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Compelling plan for leading the development of the school from post-approval to opening, including identification of a capable individual or team to lead the planning and start-up, as well as a viable plan for compensating this individual or team during the planning year.</li> <li>▪ Adequately addresses potential challenges.</li> <li>▪ Detailed start-up plan specifying tasks and timelines which are aligned with a sound start-up budget.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.3 FACILITIES</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Facility plans are reasonable and adequately meet the requirements of the educational program and anticipated student population.</li> <li>▪ A sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.4 PERSONNEL/ HUMAN CAPITAL</b>		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>▪ The schools organizational charts (<b>Attachment G</b>) clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the Board, staff, any related bodies (such as advisory bodies or parent/educator councils), and any external organizations that will play a role in managing the school.</li> <li>▪ If leader is identified, chosen leaders have necessary qualifications, competencies, and capacity for their assigned roles and resumes for school leadership are included (Attachment H). If available, includes previous student achievement data for school leadership (<b>Attachment H</b>). NOTE: If school leader has not been chosen, a clear description of qualifications, expectations, responsibilities and timeline for hiring is included.</li> <li>▪ Identifies strategies for supporting school leadership.</li> <li>▪ Recruitment and hiring strategy, criteria, timeline, and procedures are likely to result in a strong staff and are well suited to the school.</li> <li>▪ Compensation packages are likely to attract and retain strong staff are clearly defined.</li> <li>▪ Provides a strong plan for supporting, developing, and annually evaluating school leadership and teachers that aligns statewide evaluation requirements.</li> <li>▪ Effective planning for unsatisfactory leadership/teacher performance and turnover.</li> <li>▪ Employee manual and personnel policies (<b>Attachment I</b>) are complete and effective.</li> <li>▪ Staffing projections for each year are robust and aligned with the educational program and conducive to the school's success.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.5 PROFESSIONAL DEVELOPMENT</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Professional development standards, opportunities, leadership, and calendar/scheduling effectively support the education program and are likely to maximize success in improving student achievement.</li> <li>▪ Thoughtful plan for professional development in the areas of special education and English Language Learners, including implementation of IEP's, discipline of students with disabilities and communication with ELL families.</li> <li>▪ Professional development plan supports professional growth, generates collaboration, and cultivates future leadership.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.6 INSURANCE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Plan to secure comprehensive and adequate insurance coverage, including worker’s compensation, liability, property, indemnity, directors and officers, automobile, sexual abuse and any other required coverage.</li> <li>▪ If applicable, additional liability for such activities as sports teams.</li> <li>▪ Insurance company letter (<b>Attachment J</b>) states required coverage will be provided upon approval of the charter school application.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.7 TRANSPORTATION – IF APPLICABLE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Clear description of transportation plan that includes anticipated routes, extracurricular activities, and Saturday school where applicable.</li> <li>▪ A comprehensive oversight plan that identifies school staff responsible for this oversight.</li> <li>▪ Description of how the school will arrange transportation for special needs students where necessary.</li> <li>▪ Demonstrated familiarity with state and federal regulations relating to provision of transportation services to students.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.8 FOOD SERVICE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ A clear description of how the school will offer food service to all students, adhering to all nutritional guidelines.</li> <li>▪ A plan to collect free and reduced price lunch information, including procedures to receive reimbursement.</li> <li>▪ A plan to ensure compliance with applicable state and federal regulations.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.9 ADDITIONAL OPERATIONS – IF APPLICABLE</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Detailed plans for use of technology within the classroom and for state assessments.</li> <li>▪ Provides compelling data management plan that includes communication strategies for parents.</li> <li>▪ Demonstrates understanding of health and safety requirements that includes a plan for hiring a registered nurse for creating individual health plans as required by law.</li> <li>▪ Detailed safety and security plans for students, staff, guests, and property.</li> <li>▪ Provides detailed maintenance plan for school facilities.</li> <li>▪ If school plans to contract with a CMO, describes rationale and process for selecting CMO and explanation of why the CMO is a strong choice and good fit for the proposed school and community.</li> <li>▪ Provides clear division of roles between the board and the service provider.</li> <li>▪ If available, the CMO arrangement (<b>Attachment K</b>) is free of conflicts of interest and there is a viable plan for identifying and managing potential conflicts.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.10 WAIVERS</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Detailed description of waivers requested that includes compelling and thoughtful rationale describing how the waivers will impact student achievement.</li> <li>▪ A demonstrated understanding of the rules and statutes that cannot be waived under Tennessee law.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.11 NETWORK VISION, GROWTH PLAN, &amp; CAPACITY (FOR EXISTING OPERATORS)</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Detailed strategic vision for the network that includes a robust five-year network growth plan. Growth plan should include the following: proposed years of opening; number and types of schools; a clear, detailed outline of any pending applications (whether in the same LEA, Tennessee or another state); all current and/or targeted markets/communities and criteria for selecting them; and projected enrollments.</li> <li>▪ Strong, compelling evidence of organizational capacity to open and operate high quality schools in Tennessee and elsewhere including specific timelines for building organizational capacity.</li> <li>▪ Clear, detailed description of the results of past replication effort, challenges, and lessons learned, and how the organization has addressed any challenges.</li> <li>▪ Realistic presentation of anticipated challenges and risks over the next five years associated with opening additional schools, along with a plan to overcome them to achieve the organization’s stated outcomes.</li> <li>▪ Comprehensive and complete annual report (both network and individual schools) (<b>Attachment L</b>).</li> <li>▪ If facility has been selected, facility plans are reasonable and adequately meet the requirements of the educational program and anticipated student population.</li> <li>▪ If facility has not been selected, or selected facility needs renovations/upgrades, a sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility.</li> </ul>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.12 NETWORK MANAGEMENT (FOR EXISTING OPERATORS)</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Leadership team identified and role and responsibilities listed.</li> <li>▪ As <b>Attachment M</b>, organizational charts for Year 1, Year 3, and Year 5 clearly delineate roles and responsibilities of the governing board, including lines of authority between the board, school leadership, and staff. If applicable, the chart should include other related bodies (advisory bodies or parent-teacher councils) and a charter management organization if school has contracted with one and it will play a role in managing the school.</li> <li>▪ Clear, compelling network strategy that includes any shared or centralized support services, along with their costs, across the network.</li> <li>▪ Strong description of relationship between schools and charter management organization, including presentation of a contract or MOU (if applicable).</li> <li>▪ Fees from member schools are clearly delineated, along with a rationale for their collection, use, and structure (if applicable).</li> <li>▪ Associated table provided in application is complete with explanations for school and organization-level decision-making responsibilities.</li> </ul>		
<b>Initial Application Review</b>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.13 NETWORK GOVERNANCE (FOR EXISTING OPERATORS)</b>		
Characteristics of a strong response:		
<b>1) If there is a network board that operates as the main governing body with each school having an advisory committee:</b> <ul style="list-style-type: none"> <li>▪ Applicant provides a complete description of the governance structure at the network level and delineates how that relates to each individual school within the network.</li> <li>▪ Provides a robust plan for ensuring there is adequate local/Tennessee stakeholder representation.</li> <li>▪ Roles and responsibilities of this board described clearly and concisely.</li> <li>▪ Description of the current size and composition of the governing board, with a rationale of how the current/proposed governance structure and composition will ensure the desired outcomes of a network of highly effective schools.</li> <li>▪ A clear and compelling plan to evaluate academic and operational success including the evaluation of the school and school leader (s).</li> </ul>		
<b>2) If there will be one governing board for all schools at the local level, or separate governing boards for each school:</b> <ul style="list-style-type: none"> <li>• <b>If there will be one governing board for all schools:</b> <ul style="list-style-type: none"> <li>○ A clear, detailed description of the governance structure at the network level and how it relates to the individual school including any changes that will take place at the board level for it to be effective (if necessary).</li> <li>○ A copy of the by-laws and organizational chart is included.</li> <li>○ A clear, thorough plan to transform the board’s membership, mission and by-laws to support the expansion plan. Plan should include timeline for the transition and orientation of the board to its new responsibilities.</li> </ul> </li> <li>• <b>If there will be a separate governing board for each school:</b> <ul style="list-style-type: none"> <li>○ A clear, detailed description of how the new governing board will be formed and the relationship between the new and old boards described, along with any overlapping responsibilities.</li> <li>○ Includes biographies of new board members, roles and responsibilities of the board described clearly and concisely, an organizational chart and governing board structure.</li> </ul> </li> <li>▪ By-laws of the new board are included (if available) and there is a plan in place for board training as required by Tennessee law.</li> </ul>		
Initial Application Review		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

<b>2.14 CHARTER SCHOOL MANAGEMENT CONTRACTS (IF APPLICABLE; FOR EXISTING OPERATORS)</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ As <b>Attachment N</b>, a detailed, strong rationale explaining the selection of the CMO, including descriptions of proposed duration of the contract, roles and responsibilities of the governing board, school staff, and the service provider, scope of services provided, performance evaluation measures, financial controls, and terms of renewal.</li> <li>▪ Draft of proposed management contract.</li> <li>▪ Detailed documentation of CMO's non-profit status, including evidence it is authorized to do business in Tennessee.</li> </ul>		
<b>Initial Application Review</b>		
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**SECTION 2 – OPERATIONS PLAN AND CAPACITY**

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

<b>2.16 PERSONNEL/HUMAN CAPITAL – STAFFING PLANS, HIRING, MANAGEMENT, AND EVALUATION (FOR EXISTING OPERATORS)</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Chosen leaders have necessary qualifications, competencies and capacity for their assigned roles.</li> <li>▪ Identifies strategies for supporting school leadership.</li> <li>▪ Recruitment and hiring strategy, criteria, timeline, and procedures are likely to result in a strong staff and meet requirements for being “highly qualified” and are well suited to the school.</li> <li>▪ Effective planning for unsatisfactory leadership/teacher performance and turnover.</li> <li>▪ The organizational charts (<b>Attachment G</b>) provided clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the Board, staff, any related bodies (such as advisory bodies or parent/educator councils), and any external organizations that will play a role in managing the school.</li> </ul>		
<b>Initial Application Review</b>		
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## SECTION 2 OPERATIONS PLAN AND CAPACITY

### SUMMARY COMMENTS

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

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

**SECTION 3 – FINANCIAL PLAN AND CAPACITY**

<b>3.1 &amp; 3.2 CHARTER SCHOOL FINANCING</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Budget worksheet (<b>Attachment O</b>) contains assumptions and reasonable budget numbers that reflect rent, utilities, maintenance, insurance and build-out costs.</li> <li>• Detailed budget assumptions that include the impact of the anticipated number of students who receive free or reduced price lunches.</li> <li>• Detailed financial procedures, policy, or other reasonable assurance that the proposed school will have sound systems and processes in place for accounting, payroll, and independent annual school-level and network-level (where applicable) financial and administrative audits.</li> <li>• Sound criteria and procedures in place for selecting contractors for any administrative services.</li> <li>• Complete, realistic, and viable start-up and five year operating budgets.</li> <li>• Detailed budget narrative (<b>Attachment P</b>) that clearly explains reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions, identification of the amounts and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable).</li> <li>• Sound contingency plan to meet financial needs if anticipated revenues are lower than estimated.</li> <li>• Individual and collective qualifications for implementing the financial plan successfully, including capacity in areas such as financial management, fundraising and development, and accounting.</li> </ul>		
<b>Initial Application Review</b>		
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<b>Final Application Review</b>		
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**SECTION 3 – FINANCIAL PLAN AND CAPACITY**

<b>3.3 FINANCIAL PLAN (FOR EXISTING OPERATORS COMPLETING SECTIONS 3.1 AND 3.2)</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Detailed description of the fiscal health of other schools in the network (if applicable) including a comprehensive description of any schools on fiscal probation or in bankruptcy.</li> <li>▪ Complete, realistic, and viable budget for the network (<b>Attachment Q</b>). The budget includes reasonable, well-support revenue and cost assumptions, including grant/fundraising assumptions, identification of the amounts and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated) and including evidence of firm commitments where applicable.</li> <li>▪ Sound contingency funds to meet financial needs if anticipated revenues are lower than estimated.</li> </ul>		
<b>Initial Application Review</b>		
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**SECTION 3 – FINANCIAL PLAN AND CAPACITY**

<b>3.4 FINANCIAL PLAN (FOR EXISTING OPERATORS NOT COMPLETING SECTIONS 3.1 AND 3.2)</b>		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>▪ Budget assumptions and reasonable budget numbers that reflect rent, utilities, maintenance, insurance and build-out costs of facilities.</li> <li>• Detailed financial procedures, policy, or other reasonable assurance that the proposed school will have sound systems and processes in place for accounting, payroll, and independent annual school-level and network-level (where applicable) financial and administrative audits (both school level and network level).</li> <li>• Complete, realistic, and viable start-up and five year operating budgets for network and individual schools (<b>Attachment Q</b>) that align with the academic plan and operations plan included in the application. If applicable, clearly describes the fiscal health of any other schools in the network and any fiscal issues the schools have faced (bankruptcy, fiscal probation, etc.).</li> <li>• Detailed budget narrative (<b>Attachment P</b>) that clearly explains reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions, identification of the amounts and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable).</li> <li>• Sound contingency plan to meet financial needs if anticipated revenues are lower than estimated. Particularly important is Year 1 cash flow projections and contingency, as well as a 24-month cash-flow projection.</li> <li>• Individual and collective qualifications for implementing the financial plan successfully, including capacity in areas such as financial management, fundraising and development, and accounting.</li> <li>• Detailed budget is inclusive of both individual schools and network.</li> <li>▪ All cost revenues and all major expenditures are accounted for and are realistic.</li> </ul>		
<b>Initial Application Review</b>		
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**SECTION 3 FINANCIAL PLAN AND CAPACITY**

**SUMMARY COMMENTS**

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

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

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

<b>4.1 PAST PERFORMANCE (FOR EXISTING OPERATORS)</b>		
Characteristics of a strong response: <ul style="list-style-type: none"> <li>▪ Applicant provides clear, compelling evidence of successful student outcomes for each school in the network (Portfolio Summary Template, <b>Attachment S</b>) and evidence that the operator's schools are high performing and successful by meeting state standards and national standards (<b>Attachment R</b>).</li> <li>▪ Graduation rates are indicative of highly successful graduation strategies (if applicable, <b>Attachment R</b>).</li> <li>▪ Applicant selects one or more of the organization's consistently high-performing schools and provides a detailed narrative outlining primary causation of high-quality, high-performing status, along with description of challenges met and overcome.</li> <li>▪ Applicant selects one or more of the organization's low or unsatisfactorily performing schools and provides a detailed narrative outlining primary causation of low performing school(s) in the network and specific strategies outlined that corrected, or will correct, the deficiencies (if applicable).</li> <li>▪ Latest audit (<b>Attachment U</b>) shows no findings and is prepared in accordance with generally accepted accounting and auditing principles as is outlined in Tennessee law.</li> <li>▪ Organization is in good standing wherever they have located schools, and there have been no revocations, litigation that has resulted in negative outcomes, non-renewals, or financial, organizational, or academic deficiencies (if applicable, <b>Attachments T and V</b>).</li> </ul>		
<b>Application Review</b>		
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