Evaluation Form for the
Nevada State Public Charter School Authority
Fall Cycle

Evaluation Overview and Timeline

The Evaluation Form is the essential tool for application evaluators, and will be completed individually by each evaluator. It contains criteria for each section of the proposal. The evaluators present both ratings on a scale and narrative analysis of each subsection of the application. Throughout the process, evaluators will update their Forms to include additional information (due diligence, capacity interview) as it is presented. Within each section and subsection, specific criteria define the expectations for a response that "Meets the Standard." An applicant must "Meet the Standard" in all four main portions (Meeting the Need, Finance Plan, etc.) by the end of the evaluation process to be recommended for authorization. In general, the following definitions guide evaluator ratings:

Rating	Characteristics
Meets the Standard	The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant's capacity to carry out the plan effectively in a way which will result in a 4 or 5 star school.
Approaches the Standard	The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.
Does Not Meet the Standard	The response is undeveloped or incomplete; demonstrates lack of preparation; or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.

In addition to meeting the criteria that are specific to that section, each part of the proposal should align with the overall mission, academic program, budget, and other sections of the application.

Instructions for Evaluators

1. Fill in your name, the name of the applicant group, and the name of the proposed school. Click once on the grey boxes to begin typing.
   2. Complete the summary page LAST. 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.
3. For each subsection of the application, you should do the following during your initial individual analysis of the proposal:
   a. Select a rating for that subsection. Click once on the gray box to select. If you are not able to check the box, please <mark>HIGHLIGHT your selection.</mark>
   b. Use the "Strengths" area to identify notable positive aspects of the response. Be sure to include page references where applicable.
   c. Use the "Weaknesses" area to identify weaknesses. Again, reference relevant page numbers.
   d. Use the "Clarifying Questions" area to present key questions which need to be addressed and areas that need to be clarified or confirmed in writing.
4. Save the document (as a Word Document) using this naming convention: SPCSA Eval_School Name_YOUR LAST NAME.doc (For example, for the request for Sagebrush Charter Schools by Patrick, the file name would be: SPCSA Eval_Sagebrush_GAVIN.doc.) Upload your document to Dropbox using the instructions provided.
5. Following the capacity interview you should do the following:
   a. Select a final rating for that section. Click once on the gray box to select. If you are not able to check the box, please <mark>HIGHLIGHT your selection.</mark>
   b. Use the "Interview Notes" area to present key information discovered or confirmed during the capacity interview. You are not required to type directly into the form during the interview, but may do so if you prefer.
   c. Use the "Revised Analysis" area to provide your final evaluation of that subsection based on the complete application record (proposal, due diligence if applicable, followup questions and clarifications, capacity interview). This analysis should support the final rating you select.
   d. Revise your summary page as needed.
6. Save the revised document (as a Word Document) using this naming convention: SPCSA Eval FINAL_School Name_YOUR LAST NAME.doc (For example, for the evaluation of Sagebrush Charter Schools by Patrick, the file name would be: SPCSA Eval FINAL_Sagebrush_ GAVIN.doc.) Upload your document to Dropbox using the "Individual Evaluation Form: Final" task that is provided.
7. **Please ensure that all feedback and commentary are in complete sentences. Page numbers and location on the page should be cited in the text, e.g., "In the third paragraph on page 35…"**

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COMPLETE THIS PAGE LAST

Evaluator Name:

Applicant Group:

Proposed School Name:

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.

When evaluating the evidence provided by charter applicant groups, the review team will evaluate the following holistic standards in addition to the standards within each section. Holistic standards are considered met unless the review team identifies evidence that they are not met.

Standard	Example Evidence of Standard Not Being Met
Comprehensiveness - No requested information or essential pieces of the educational model are left out of the proposal.	A student recruitment plan is not discussed in the required section. There is no information provided on the school's mathematics program.
Support - All claims are backed up with data and citations.	The application states that 150 parents would send their kids to the proposed school but does not say how the data was collected or why it is reliable. It is unclear what data the school is using to support an expense assumption The efficacy of the proposed model is based on an implementation which is not consistent with the proposed program.
Mission Alignment – All pieces of the plan are working towards the same purpose.	The application includes a character education program, but character education is neither a component of the mission nor is there a description of how character education will contribute to the academic purpose of the school described by the mission. The partnerships identified and letters of support appear to be included to impress or intimidate the reviewer based on political considerations instead of clear mission alignment and a clear, concrete, and relevant contribution to academic program and the the fulfillment of the proposed mission.
Cohesion – All pieces of the plan are integrated with each other.	The number of students used to create financial projections is not the same as the target number of students described in the community needs section. Positions are mentioned in the narrative or capacity interview that are not consistent with the organizational chart, staffing plan, or budget. Role responsibilities alluded to in the narrative or capacity interview do not align with the job description.

EXECUTIVE SUMMARY

Initial Application Review		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

After Capacity Interview		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

MEETING THE NEED

Initial Application Review		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

After Capacity Interview		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

ACADEMIC PLAN

Initial Application Review		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

After Capacity Interview		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

OPERATIONS PLAN

Initial Application Review		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

After Capacity Interview		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

FINANCIAL PLAN

Initial Application Review		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

After Capacity Interview		
Meets the Standard ☐	**Approaches the Standard** ☐	**Does Not Meet the Standard** ☐
COMMENTS:		

EXECUTIVE SUMMARY

A strong response will have the following characteristics upon first reading:
- Summarizes or builds upon the school's existing mission and vision
- Provides an articulate explanation of how the proposal meets the needs of the target community and the strategic and academic goals of the State Public Charter School Authority
- Clearly identifies the long term academic, organizational, and financial outcomes the school expects to achieve in new target communities
- Describes the key components of the school's educational model that will support operation in new target communities
- Clearly identifies the values, approach, and leadership accomplishments of the proposed school leader or leadership team in new target communities
- Specifically identifies key supporters, partners, or resources that will contribute to the school's success in new target communities

After reading the entire application, a strong response will have the following additional characteristics:
- Summarizes (does not simply restate) the school's current or expanded mission and vision in a manner consistent with the current or proposed revised mission and vision statement described throughout the application
- The summarized academic model to be implemented at the expansion sites is consistent with the model described throughout the amendment request
- The discussion of the target community, its specific needs, and the explanation of how these are addressed by the proposed school is consistent with the rest of the amendment request
- The goals are consistent with those described throughout the amendment request
- The key components of the educational model that will ensure success in the new locations are consistent with those described throughout the document
- The values, approach, and leadership accomplishments of the proposed school leader or leadership team are consistent with those identified throughout the document
- The key supporters, partners, or resources that will contribute to the expanded school's success are consistent with those identified throughout the document

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

Recommendations from the Evaluation Team are based on evaluation of the written application (narrative and attachments), independent due diligence (as applicable), and the applicant interview. In addition to meeting the criteria that are specific to that section, each part of the proposal MUST align with the overall mission, academic program, budget, and other sections of the application.

MEETING THE NEED

TARGETED PLAN
A strong response will have the following characteristics:

- Specifically identifies a target community within the district by geography (e.g.zip code and school zones) and/or educationally disadvantaged status, as that term is described in federal law
- Clear and compelling rationale for the selected communities based on academic need
- Demonstrated commitment to serving the target population, i.e. a cross section of the local zoned school population or specific educationally disadvantaged populations
- Articulate explanation of how the school model meets community academic needs
- Clear explanation of how the model and commitment to serve align with the mission and vision of the SPCSA.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

Recommendations from the Evaluation Team are based on evaluation of the written application (narrative and attachments), independent due diligence (as applicable), and the applicant interview. In addition to meeting the criteria that are specific to that section, each part of the proposal MUST align with the overall mission, academic program, budget, and other sections of the application.

GROWTH RATE AND RATIONALE

GROWTH
A strong response will have the following characteristics: • Specifically describes the applicant and any affiliated operator's six year growth plan for Nevada and other states • Specifically identifies the school and any affiliated operator's approved and pending charter school sites as well as those which it anticipates applying for over the next six years, including the number of campuses, proposed locations, proposed six year enrollment projections, and grade configuration and type of school • Clear and compelling rationale for the growth plan for the school and the network, including the pace and scope of the growth plans • If the school or its non-profit or for-profit EMO proposes or projects locating in new communities within its current county or other counties in Nevada, the school provides a clear and compelling rationale for selecting those specific geographies. • If the school or its non-profit or for-profit EMO proposes or projects locating in new communities in other states, the school provides a clear and compelling rationale for selecting those specific communities and states. • Demonstrates a strong understanding of potential expansion risks and articulates a well-developed plan for mitigating those risks and appropriate contingencies based on its experience in Nevada and any other states as well as experience from other networks and other multi-site social enterprises or multi-site non-profit or for-profit organizations. • A candid discussion of lessons learned from both charter holder and any EMO vendor's experience operating schools and replicating operations in this or other jurisdictions which specifically identifies challenges encountered, the solutions attempted and an evaluation of success, and how the school will minimize such threats for the proposed campuses.

The applicant's response:

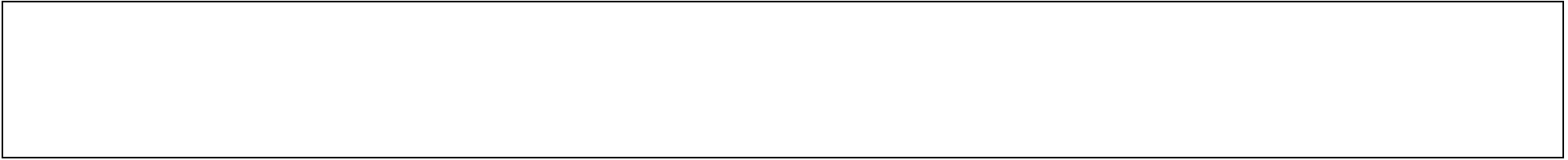| Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

PARENT AND COMMUNITY INVOLVEMENT

A strong response will have the following characteristics:

- Demonstrates clear evidence of the involvement of parents, neighborhood, and/or community members representative of each target community (identified by zip code and attendance zone) in the development of the expansion plan
- Outlines plan to effectively engage parents, community members, and other neighborhood partners from the time that the expansion is approved (e.g., conducting home visits, community meetings, etc.)
- Incorporates a feedback loop to surface the priorities and concerns of parents and the broader school community in each target neighborhood
- Includes plan to incorporate parents from each target community into the life of each campus of the school, once open (e.g., site councils, parent advisory council, student placement, trainings, communications, volunteers, etc.)
- Demonstrates strong connections to and knowledge of the specific target community(ies)
- Includes plan to incorporate specific assets from each target community into the life of each campus of the school (e.g., providing resources, programs, volunteers, etc.)
- Identifies specific partnerships which are clearly relevant to the needs of the target population in each target community. Partnerships are evidenced by specific letters of commitment outlining the accountabilities of both parties and clear, measurable, time-specific deliverables from the partner which are clearly relevant to the needs of the target population.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

ACADEMIC PLAN

MISSION AND VISION

A strong response will have the following characteristics:

- The current approved mission is restated and reaffirmed. Any proposed revision to the mission based on analysis of the needs of the target communities is clear, concise, compelling, and measurable
- Amy revised mission statement defines the purpose and specialized focus of the school to its stakeholders and the public.
- Any revised mission speaks to the value of the school, based on its own merit, and communicates the applicant group's core beliefs and values about education.
- Any revised mission indicates the key design elements proposed to achieve outcomes.
- Any revised mission is consistent with high academic standards and student success.
- The currently approved or proposed revised mission is reflected throughout all sections of the application.
- Any revised mission encompasses the whole student (e.g., personal, social, emotional, intellectual, life skills, safety and security
- The vision is either restated or reaffirmed. Any proposed revision provides a coherent description of what the school will look like when it is achieving its mission
- Any proposed revision to the vision is aligned to the mission and critical to the school's success

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

CURRICULUM & INSTRUCTIONAL DESIGN

A strong response will have the following characteristics:

- Presents objectively verifiable academic data that demonstrates that the school or the school it is replicating is performing at high levels in Nevada or in other states based on their statewide systems of accountability
- Includes a candid discussion of any past performance which has not met organization or authorizer expectations, including the scope of the problem, how the performance issue was diagnosed, how appropriate interventions were determined, and the status of implementation and any results to date.
- A thoughtful, self-critical analysis of key areas of improvement for existing schools and campuses and the identification of priorities that will drive further success and improvement.
- A clear explanation of the key non-negotiables, including but not limited to key school design components, policies, practices, etc. that underlie school culture and academic outcomes of the school model.
- An explicit description of the organizations loose-tight philosophy and practice, including identification and detail regarding the critical elements that are constant across schools and those that may vary, along with a discussion of any campus-level autonomies in implementing the educational plan.
- A thoughtful discussion of the organization's approach to performance management, including identification of specific systems to measure both academic and non-academic performance of each site and the network as a whole.
- Specific strategies, systems, and tools for disaggregating academic, financial, and organizational performance by site given the limitations of the Department of Education's current system for tracking charter school performance.
- A clear and compelling performance management plan that explains how the school identifies and addresses underperformance and its internal the corrective action plan procedures.
- A thoughtful discussion of the circumstances under which the school would petition the Authority to voluntarily close a consistently under-performing campus instead of awaiting authorizer intervention, including the threshold metrics the school would use to inform its decision.

High School Only:

- A clear discussion of the tools and systems, including staffing investments, that the school employs to accurately, reliably, and consistently track college acceptance, enrollment, and persistence rates.
- Inclusion of historical data that presents a strong case that the school or network's track record on college acceptance, enrollment, persistence, and/or graduation rates significantly exceeds that of similar students or a compelling explanation of why any of this data is unavailable (e.g. the network's oldest graduates are only sophomores, so graduation rates are unavailable and persistence rates only reflect one year in college).
- Specifically reports the number and the percent of total alumni for which the school has data on each metric.
- If data is not yet available, there is a clear plan for how the school will develop mechanisms to accurately, reliably, and consistently track student acceptance, enrollment, persistence, and graduation rates.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

DISTANCE EDUCATION REQUIREMENTS (Proposals Including Distance Education Only)

A strong response will have the following characteristics:

- An acknowledgement that a charter school that wishes to provide distance education (online, virtual, cyber, etc.) courses and/or programs (NRS 388.820-388.874 and NAC 388.800-388.860) must submit a distance education application to the Nevada Department of Education prior to or simultaneous with submission of the charter application.
- An acknowledgement that the distance education application must also be approved by the SPCSA through the pre-opening requirements.
- A detailed plan on how student coursework will be monitored
- A detailed plan on how the school will ensure student participation in assessments
  - a plan that shows how the school will communicate with students and parents about the how's and when's of the tests
  - a specific plan for where the school will administer state and Authority-mandated assessments in a proctored environment outside of the home and how it will ensure student access and participation
- a plan for ongoing communication with parents, parent -teacher conferences, daily/weekly emails with regards to coursework, etc.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

PRE-K REQUIREMENTS (Proposals Including Pre-K Only)

A strong response will have the following characteristics:
- Whether the school plans to offer Pre-K in it's opening year or any other year
- How the program will be marketed and funded, including:
  - An acknowledgement that a charter school that wishes to offer a federal pre-K expansion grant-funded Pre-K program must research the program, request and eligibility determination, and receive approval prior to marketing the program to families. Applicants must acknowledge that funding is limited and competitive and there is no guarantee of availability or award for the school or the target community.
    - Identification of the federal Pre-K expansion grant criteria and how the school plans to meet them
  - An acknowledgement that a charter school that wishes to offer a state-funded Pre-K program must independently research the program and apply to and receive approval from the Nevada Department of Education prior to marketing the program to families.
    - Identification of state Pre-K funding criteria and how the school plans to meet them
  - An acknowledgement that a charter school that wishes to offer a tuition-funded Pre-K program cannot give admissions preference to students who have paid tuition to the school or an affiliated Pre-K program prior to applying for admission.
- An explanation of how the school plans to communicate with parents about enrollment preference restrictions
- A clear discussion of how the school plans to incorporate its mission and vision within the Pre-K program and how it will reconcile any conflicts of tensions between its Kindergarten and elementary school programs and any licensure or program requirements associated with a particular revenue stream.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

HIGH SCHOOL GRADUATION REQUIREMENTS (Proposals Including Grades 9-12 Only)

A strong response will have the following characteristics:
- ☐ School plans explicitly demonstrate clear evidence of alignment with Nevada Graduation Requirements and ensure college and career readiness
- ☐ Structures are in place to support students at risk of dropping out, including those who are overage for grade, those needing to access credit recovery options, and those performing significantly below grade level
- ☐ Exit standards for students are clearly defined and measurable, demonstrating high expectations for all students

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

AT-RISK STUDENTS AND SPECIAL POPULATIONS

A strong response will have the following characteristics:

- Clear process for identifying at-risk students, including those with academic and behavioral needs
- Provides clear and appropriate delineation within the state-mandated Response to Intervention model
- Team/operator has a demonstrated track record of success serving a wide range of students with disabilities (mild, moderate, and severe)
- Processes for identifying students with disabilities are well-defined, including administration of placement assessments and communications to parents and teachers
- Special education staffing aligns with qualifications and student-teacher ratios required in statute:
  - For example 22:1 for students with severe disabilities (NAC 388.150)
  - Full Nevada licensure for all special education teachers/coordinators (no waivers or substitutes)
- Specific strategies demonstrating how the school will recruit, enroll, and retain students with disabilities in proportions similar to the local zoned schools and how the school will proactively address parent and community perceptions around the availability and appropriateness of charter schools to the needs of students with disabilities.
- Ensures that the rights of students with disabilities are protected with regard to discipline
- Provides specific strategies demonstrating how the school protect the rights of students with disabilities in disciplinary actions and proceedings to ensure that the school exhausts all options in order to promote the continuation of services for the student at the charter school.
- Describes the specific services that will be provided for students within and outside the classroom, including curriculum and instruction and exposure to co-teaching
- Devotes adequate resources and staff to meeting the needs of all students
- Provides a detailed plan for appropriate professional development to teachers and staff to ensure they can support and accelerate the learning of at-risk and special population students which is aligned to the budget and overall PD plan
- Clearly demonstrates deep understanding of Nevada and federal laws and regulations governing services for students with disabilities
- Articulates requirements and processes for monitoring services to students in need and plans to exit students who attain sufficient progress
- Outlines plans to promote parent participation among parents of students with disabilities

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

OPERATIONS PLAN

LEADERSHIP TEAM

A strong response will have the following characteristics:
- Current, 3 year and 6 year organizational charts clearly indicate all positions delineating board, any related bodies, and management roles and lines of authority
- Shared/allocated positions provided by an EMO are clearly identified
- Structure demonstrates effective assignment of management roles and distribution of responsibilities for instructional leadership, curriculum, personnel, budgeting, financial management, management of state categorical revenue streams, special education and ELL programming, legal compliance, state reporting, external relations, and any unique, school-specific staffing needs
- Leadership job descriptions present a realistic allocation of duties based on NDE and general state reporting and compliance requirements, including but not limited student information system management and the duties contained in the Reporting Requirements manual and current NAC and NRS
- Identifies qualifications and competencies of the lead person that align with the school's mission and program and demonstrate capacity to successfully manage the school
- Resumes demonstrate that leaders meet necessary qualifications and competencies
- School leadership team resumes and academic performance data demonstrate a range of experience including leadership at a high-performing school with management responsibilities, experience establishing a high-performing culture with students and staff, and responsibility for significant student achievement gains with target demographics
  - *If the identified school leadership team does not collectively demonstrate the experience and capacity required above, this will be reflected in the recommendation report*
  - Individual and collective qualifications of staff in the areas of school leadership, school business operations and finance, governance management and board support, curriculum, instruction, assessment, at risk student services, special needs student services, performance management, and parent and community engagement.
- Narrative clearly explains how high quality coaching and support for school leadership will be provided and by whom. Key technical and behavioral competencies are identified to structure leadership selection and development at each level.
- The role and responsibility of the network and campus leader in successfully recruiting, hiring, developing, and retaining a highly effective staff is clearly explained, including clear and unambiguous performance expectations of both staff and leaders.
- The role and responsibility of the network and campus leader in instructional leadership and the building and maintenance of school culture is clearly explained, including clear and unambiguous performance expectations of both staff and leaders.
- There is a coherent and well-developed system for ensuring that there are redundancies in knowledge and skill to support effective operation in the event of an unexpected vacancy and to provide duty rotation or cross training to support a strong succession plan for campuses and the network

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

LEADERSHIP FOR EXPANSION

A strong response will have the following characteristics:

- Structure demonstrates effective assignment of management roles and distribution of responsibilities for instructional leadership, curriculum, personnel, budgeting, financial management, management of state categorical revenue streams, special education and ELL programming, legal compliance, state reporting, external relations, and any unique, school-specific staffing needs
- Leadership job descriptions present a realistic allocation of duties based on NDE and general state reporting and compliance requirements, including but not limited student information system management and the duties contained in the Reporting Requirements manual and current NAC and NRS
- Network-level plan for sourcing and training potential school leaders, including qualifications and competencies aligned with the mission and programs
- Comprehensive leadership recruitment and development plan for sourcing new leadership from outside existing district pipeline; little if any use of passive methods such as internet job boards
- Demonstrates that any identified school leaders meet the qualifications and competencies outlined
- If identified, regional leader candidate meets the qualifications and competencies outlined above and demonstrates experience as a highly effective leader of programs serving similar populations both academically and organizationally
- The board articulates a clear, ambitious, data-driven set of standards and criteria that the regional leader must satisfy in order to keep the network and each school on track to achieve its vision.
- The board provides logical evidence that the network and each school will achieve its target student outcomes pursuant to the NSPF and the SPCSA Performance Framework if the regional leader satisfies the standards set forth by the board.
- If no regional leader candidate is identified, provides job description, including desired competencies, and timeline for selection
  - *If a regional leader is not identified for CMOs holding fewer than 2 charters this will be reflected in the recommendation report*

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

STAFFING

A strong response will have the following characteristics:
• Staffing aligned to the mission, vision, and academic program described
• Appropriately staffed to serve the intended student population
• Staffing plan matches the proposed budget and is explicitly aligned to both budget narrative assumptions and to budget calculations
• Staffing plan aligns with student-teacher ratios specified in application and those required in statute:
    o 21:1 for mandated full-day Kindergarten
    o For example: 22:1 for students with severe disabilities (see NAC 388.150)
• Sound understanding of staffing needs necessary for the new-campuses proposed

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

HUMAN CAPITAL

A strong response will have the following characteristics:

- ☐ Articulates process for recruiting and hiring high quality teachers and leaders
- ☐ Describes well-developed human capital pipeline strategy that balances internal development an external sourcing
- ☐ School professional development model and structure ensures high-quality teacher a n d l e a d e r support/development, new site PD support, and incorporates a rigorous, high quality model for evaluating the effectiveness of PD
- ☐ School performance management system is likely to retain and promote talented staff, allows for re-structuring and removal of staff as needed, creates opportunities for leadership development, and sets clear expectations
- ☐ School performance management system is likely to identify unsatisfactory teacher or leader performance, provides opportunities for improvement, and clearly explains consequences for poor performance

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

SCALE STRATEGY

A strong response will have the following characteristics:
- ☐ Adequately developed and staffed appropriately
- ☐ Previous scale-up endeavors have been thoughtful and successful (*if applicable*)
- ☐ Includes plan to infuse NV schools with the essential elements of the organization's model
- ☐ Organization has sufficient infrastructure (or plan to develop same) to support the proposed network of schools, including shared services and the costs associated with them
- ☐ Clear, appropriate delineation of roles and responsibilities between the management organization and the school sites
- ☐ Sensible organization charts clearly indicate lines of authority between the board, network, and schools

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

STUDENT RECRUITMENT AND ENROLLMENT

A strong response will have the following characteristics:

- The enrollment plan reflects an understanding of the Nevada context and the Authority's targets for serving a student body that is representative of zoned schools
- The enrollment plan and targets, including annual growth, are reasonable and supported by a clear rationale and track record
- The enrollment plan and calendar addresses lotteries, weighted lotteries, enrollment preferences, student attrition and mandatory backfilling
- The enrollment plan is aligned with the staffing plan and budget
- The organization has a strong track record at recruiting and retaining students by subgroup to ensure a population that remains reflective of the zoned schools
- The re-enrollment plan and targets, including in-year and year-to-year metrics, are reasonable and supported by a clear rationale and track record
- Articulates aggressive plan for recruiting eligible students to the school and describes specific actionable steps for ensuring the school is fully enrolled
- Includes outreach and recruitment strategies that demonstrates an understanding of the community likely to be served and is likely to allow the school to enroll sufficient numbers of students who are representative of either the surrounding zoned schools or a mission-specific educationally disadvantaged population
  - Mailers sent to all households with children within a 2 mile radius of each facility
  - Minimum 45 day notification period followed by 45 day enrollment period OR a combined 90 day notification and enrollment period
  - Campaign leverages grassroots, data-driven outreach and recruitment strategies versus the internet, social media, or other passive tactics which disproportionately benefit more advantaged populations
- Recruitment budget assumptions in budget narrative and the budget calculations align with recruitment expenses
- Schools proposing to open new elementary facilities with more than 400 students or more than 3 grade levels identify and discuss the specific elements of the school model and organizational track record detailed throughout the request that demonstrate that the proposed expansion model is designed to compensate for the known organizational and academic challenges which accompany serving larger student bodies and multiple grade levels in a start-up environment.
- Schools proposing to add a new middle or high school facility with more than 200 newly enrolled students in sixth grade or above or more than 2 grades above fifth grade identify and discuss the specific elements of the school model and organizational track record detailed throughout the request that demonstrate that the proposed expansion model is designed to compensate for the known organizational and academic challenges which accompany serving larger student bodies and multiple grade levels in a start-up environment.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

BOARD GOVERNANCE

A strong response will have the following characteristics:

- Strong understanding of the roles and responsibilities of a governing body that is aligned to the school's mission
- If changes to governance structure are proposed, revised governance structure is likely to ensure effective governance and meaningful oversight of school performance in academics, operations, and finance
- Clear delineation of authority and working relationship between the governing body and campuses
- Demonstrates that the membership of the governing body will contribute the wide range of relevant knowledge, skills, and commitment needed to oversee a successful multi-site charter school
    - Qualifications and experience levels of governing body members with accounting and finance experience significantly exceeds the statutory minimum requirements and demonstrates proven track record of successful management or oversight of a multi-million dollar, multi-site entity
    - Qualifications and experience levels of governing body members with legal experience significantly exceeds the statutory minimum requirements and demonstrates proven track record of successful management or oversight of complex, high risk/high profile legal matters
    - Qualifications and experience levels of governing body members with human resources experience includes significantly exceeds the statutory minimum requirements and demonstrates proven track record of successful management or oversight of a human resource function or process in a mid-sized to large multi-site employer with staffing levels equivalent to those of the school at full capacity
    - Qualifications and experience levels of governing body members who are licensed Nevada educators significantly exceeds the statutory minimum requirements and demonstrates proven track record of significant academic gains in the classroom (for classroom teacher) or school level (for an administrator) in schools which serve populations similar to the target population
- For each of the following areas, at least one board member has the appropriate knowledge to recognize if the school is at risk of failing to achieve its mission because it is going astray – academics, finances, legal issues, management and operations, and community relations.
- Identifies board development needs, including skill gaps and provides plans for meaningful training for board members and recruitment of board members with specific target skills and experiences
- Board training costs are reflected in the budget narrative assumptions and the budget calculations
- There are no prohibited familial relationships between proposed new charter holder board members, proposed new charter holder board members and staff, or proposed new charter holder board members and EMO employees within the third degree of consanguinity or affinity nor any supervisory or business relationships.
- Board has a clear policy and procedure for addressing conflicts of interest.
- Board's Code of Ethics and conflict of interest policy are clear and consistent and specify the process and procedures for implementing the policy.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

INCUBATION YEAR DEVELOPMENT

A strong response will have the following characteristics:
- Provides key planning year milestones for the planning year, as well as concrete actions and accountability, to ensure that the school is ready for a successful launch
- Describes leader development that includes training aligned with incubation year goals (may be either designed by or outsourced by the operator)
- Outlines the function of any employees in Year 0, as well as the funding source for associated compensation
- Startup expenses are reflected in the budget narrative assumptions and the budget calculations

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

EMO RELATIONSHIPS AND SCHOOL MANAGEMENT CONTRACTS (Only if Contract is New or Revised)

A strong response will have the following characteristics:

- Clear rationale for selection of Educational Management Organization (EMO)
- Demonstrates capacity and commitment of the governing board to oversee the EMO effectively:
- Plan for board to monitor/evaluate the EMO's performance
- Appropriate internal controls guide the relationship
- Describes how the governing board will ensure fulfillment of performance expectations
- Discloses and addresses any potential conflicts of interest (real or perceived)
- Clearly defined contract terms including: contract duration; roles and responsibilities of the school governing board, school staff, and EMO-specific services and resources to be provided by the EMO; performance evaluation measures and mechanisms; compensation to be paid to the provider; financial controls and oversight; methods of contract oversight and enforcement; investment disclosure; and conditions for renewal and termination of the contract, and alignment of the key performance indicators for the EMO and the hierarchy of sanctions for poor performance with the SPCSA academic, financial, and organizational frameworks and intervention ladder. SB509 requires that a management relationship and a management contract may not jeopardize a school's eligibility to qualify for 501c3 status. The IRS has several criteria which are used by the Authority:
  - o A charter school must show that contracts, especially comprehensive management contracts, have been negotiated at arm's length and are for the benefit of the school rather than the service provider. The IRS has determined that boilerplate contracts may be an indicia that the terms of the contract were not the subject of negotiations between independent parties; the applicant must provide clear and compelling evidence that the contract submitted is not a boilerplate contract.
  - o Representation of both the school and the management by the same attorney or payment of the school's attorney by the EMO is also an indication of the absence of arm's length negotiations.
  - o When reviewing a charter school contract for management services, determine whether the terms are consistent with fulfillment of the school's exempt purposes. Some contract terms, may result in a finding that the school is operated for the benefit of the management and preclude exemption. Areas of concern include:
    - ▪ A management contract is subordinate to the charter contract. In the event of any conflict between the management contract and the charter contract or current law or regulation, the charter contract, law, or regulation governs.
    - ▪ Length of Contract -A contract's length can greatly influences the board's ability to monitor and evaluate the management's performance. There is a need to balance management company' 's interest in a long-term contract with the school's need for flexibility in changing companies and meeting its fiduciary responsibility and its responsibilities under the charter contract, law, and regulation. Nevada requires that all management contracts must initially be for two years and no management contract can have a term that extends beyond the charter term. A management contract must cease in the event that a school is reconstituted or restarted. Cancellation of a management contract may be a requirement for renewal.
    - ▪ Board Policies -The general policies concerning the operation and management of a charter school may not be contracted away. These broad policies help define the school's identity.
    - ▪ Services - Comprehensive school contract packages place much of the control of the day-to-day operations in the hands of the management . Responsibilities of both the company and the school must be clearly stated in the contract.

EMO RELATIONSHIPS AND SCHOOL MANAGEMENT CONTRACTS (If Applicable)-Continued

- Personnel – Up to 30 percent of principals, teachers and staff may be employed directly by the school or may be employees of the management. However, the existence of an anti-compete clause that prevents a school from hiring the personnel that it has utilized in operating its school (principals, teachers, etc.) for a specific length of time after termination of the management contract is impermissible, as. this practice serves the private interests of the management and limits the school's ability to terminate the contract.
- Compensation - management fees must be reasonable and commensurate with the services provided. A management fee structure should not be based on total income (i.e., all fees, grants, contributions, and unusual receipts). Compensation should not be above the market rate generally charged for the service provided. This can be established through evidence of comparative shopping for services. An applicant must provide clear and compelling evidence of due diligence related to the market rates for such services.
- Termination - A service contract should specify the provisions for termination and the procedure for evaluating when the terms of the contract are in default. Termination provisions that unreasonably restrict and limit the options of the school are evidence of private benefit to the service provider. No contract can have an automatic renewal provision. All contract evaluations must be aligned to the elements of the charter contract and performance framework (as amended) and current law and regulation for which the management organization provides supporting services.
- Consider name identification - In many cases, contractual provisions require a charter school to attach the management company's name to the school (i.e., Company X Charter School or Charter School, a Company X affiliate or Y Brand Charter School, where the brand is the property of Company X.) The IRS has determined that "Name branding" has no clear exempt purpose. It links management companies to exempt schools and allows the company to draw goodwill from the relationship. It allows the management companies to build name recognition without additional expense. It also places a contractual burden on the charter schools, making it more difficult for the school to terminate the relationship with the management company. A "name branding" requirement may be an indicator of private benefit depending upon the facts and circumstances. While "name branding" is not specifically forbidden by state law, it will be scrutinized heavily pursuant to SB509 due to the IRS concerns—both to ensure that 501c3 status is not delayed or jeopardized and to ensure that the school that is permitted to use a "name brand" can provide the IRS with evidence that this was scrutinized and determined to be appropriate by a public agency. "Name branding" is more likely to be allowed by the Authority in cases where the established brand name is associated with a proven school model with a lengthy track record of consistent achievement at the highest levels on the statewide accountability systems in each state where it is implemented. It is unlikely to be permitted in cases where the brand and associated model has a limited or mixed track record. A management contract must contain provisions regarding the change of school names which aligns with the charter contract, state law and regulation, and Authority expectations that the school name include the words "Public Charter School" or that the phrase "a public charter school" accompany the school's name on the school's website, signage, letterhead, and marketing materials in a prominent and consistent manner.
- Analyze ancillary services provided - Comprehensive school management companies may provide other services directly or through affiliates. These services may include cash advances for start up funds, capital loans, facility leasing, technology contracting, furnishings, fixtures, textbooks, and just about anything else a charter school may need. The IRS recognizes that such services can be essential for start up schools, but schools should maximize their use of other available funding mechanisms (including the Nevada revolving loan fund) with more competitive interest rates. However, the reviewer should scrutinize agreements and the narrative carefully for clear and compelling evidence to determine whether the terms were the result of arm's length negotiation with an independent charter school board or are, in effect, adhesion contracts with a captive school board.

- There is no provision permitting the EMO to appoint members to the governing body or approve members.

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EMO RELATIONSHIPS AND SCHOOL MANAGEMENT CONTRACTS (If Applicable)-Continued

- If school leadership is employed by the EMO, there are provisions in the contract, bylaws, and organizational structure that ensure board approval, Provides evidence of EMO's demonstrated track record of success in serving a similar population using the same academic model and its track record in managing financial and organizational outcomes to levels consistent authorizer financial and organizational frameworks expectations.
- There is no provision permitting the EMO to appoint members to the governing body or approve members.
- The contract does not allow for any form of leverage – including but not limited to severance fees and facilities ownership – by which the EMO can ensure renewal of their contract.
- There are no prohibited familial relationships between charter holder board members and EMO employees within the third degree of consanguinity or affinity nor any supervisory or business relationships between charter holder board members or relatives of such and relatives of EMO employees within the third degree of consanguinity or affinity.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

SERVICES

A strong response will have the following characteristics:
- Operations plan includes all essential and program-specific non-academic services, including, but not limited to:
  - Supporting transportation, food service, facilities management, nursing, and purchasing processes, and school safety
  - Staff structure/plan is adequate for the proposed school and aligns with the educational program; lines of authority are clear and ppropriate
- IT plans should include consideration of:
  - User access control policies, limitation of access rights and procedures for removing access from departing employees—including notifying the Authority of user access control changes for state data systems such as Epicenter, Bighorn/SAIN or Infinite Campus
  - Policies for data stored on personal and portable devices aimed at minimizing inadvertent disclosing of information, such as theft or misplaced equipment
  - Strategy for information backups and disaster recovery
  - Intruder prevention strategies, including physical and electronic intrusion
  - Malware and malicious software prevention and removal strategy
  - An effective plan for managing student information, including Infinite Campus, evidence of contact with the vendor to price and arrange for training, and the provision of appropriate on-site on contract staffing and support resources and an information security plan for staff, students, parents, and contractors.
- Alignment of services and staff with budget and academic program
  - Metrics and process for evaluating effectiveness of services

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

FACILITIES

A strong response will have the following characteristics:

- Identifies a viable educational facility or facilities that meets the needs of the students and accommodates the programmatic and operational needs of the school(s) over the charter term as described throughout the application—OR—discusses in detail the plan and timeline to identify and secure facilities as needed
- Demonstrates knowledge of facilities costs including, as applicable, cost of purchasing, leasing, building, or renovating an educational facility that conforms to applicable health, safety, and occupancy requirements
- If a facility has been identified
    - Designation of the proposed facility and alternatives.
    - Evidence that facility will be appropriate for the educational program of the school and adequate for the projected student enrollment
    - Adequate reflection of the costs associated with the proposed facility in the budget including rent, utilities, insurance and maintenance.
    - Assurance that the proposed facility will be in compliance with applicable building codes, health and safety laws, and with the requirements of the American with Disabilities Act (ADA).
    - A sound plan to identify needed startup costs and renovations as well as the funds and a timeline for the completion of those renovations.
- If a facility has not yet been identified
    - Description of anticipated facilities needs including evidence that the facility will be appropriate for the educational program of the school and adequate for the projected student enrollment
    - Inclusion of costs associated with the anticipated facilities needs in the budget including renovation, rent, utilities, insurance and maintenance.
    - Evidence to indicate that facilities-related budget assumptions are realistic based on anticipated location, size, etc.
    - Assurance that the proposed location will be in compliance with applicable building codes, health and safety laws, and with the requirements of the American with Disabilities Act (ADA).
    - Plan for finding a location including a proposed schedule for doing so.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

ONGOING OPERATIONS

A strong response will have the following characteristics:

- Safety and security plans likely to ensure a safe environment for people and property
- The applicant demonstrates a strong understanding of the core elements of the state-mandated school safety plan and the requirements in statute and regulation
- The applicant does not provide plan details in the publicly available charter application which are considered confidential and exempt from public disclosure by law due to school safety and security considerations
- Provides for adequate insurance coverage that meets the mandatory minimums for each charter school and scales depending on the size the school and number of proposed campuses
  - general liability insurance with a minimum coverage of $1,000,000
    - including coverage for molestation and sexual abuse
    - broad form policy, with the named insureds as follows:
      - The sponsor of the charter school;
      - All employees of the charter school, including, without limitation, former, present and future employees;
      - Volunteers at the charter school; and
      - Directors of the charter school, including, without limitation, executive directors.
  - Umbrella liability insurance with a minimum coverage of $3,000,000.
  - Educators' legal liability insurance with a minimum coverage of $1,000,000.
  - Employment practices liability insurance with a minimum coverage of $1,000,000.
  - Employment benefits liability insurance with a minimum coverage of $1,000,000.
  - Insurance covering errors and omissions of the sponsor and governing body of the charter school with a minimum coverage of $1,000,000.
  - If applicable, motor vehicle liability insurance with a minimum coverage of $1,000,000.
  - If applicable, liability insurance for sports and athletic participation with a minimum coverage of $1,000,000.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		

FINANCIAL PLAN

FINANCIAL PLAN

The SPCSA requires operators to demonstrate budgeting and financial management as well as fiscal responsibility and transparency at each the school and network level (*if applicable*). Therefore, a strong response will have the following characteristics:
 	
• Budget priorities are aligned with school and expansion plan
• School level budget priorities are consistent with the operator's model, including but not limited to: educational program, staffing, and facility
• Both school and network level budgets present balanced, realistic, evidence-based revenue and expenditure assumptions (including, if applicable, any plan to incur and repay allowable debt)
• Sufficient detail and specificity of assumptions for ALL budget line items to allow for the assessment of fiscal viability
• Commitment to maintaining the financial viability of each school individually and the network as a whole
• Clear understanding of monthly cash flow for both individual school sites and the network/region as a whole
• Demonstrates sufficient financial health of the network through audited financial documents
• Current ratio of at least 1.1 on a monthly basis for network (if applicable) and school
• The debt-to-asset ratio is less than 0.9.
• Sufficient cash reserves to cover operations for EACH school/campus and for network or regional operations (if applicable), required minimum of 30-days in Year 1 and increasing each year
• Projections are based on accurate, conservative, and legally compliant assumptions.
• All funds from external sources are guaranteed with money in hand or letter of award and grant terms.
• No essential services are funded at amounts that would preclude the applicant group from implementing their plan.
• There is no evidence that the school ever will become insolvent or lack access to the necessary amount of liquidity.
• There are no material findings in the two most recent audited financial statements of CMO/EMO or any CMO and EMO schools (If applicable).
    o Current ratio of at least 1.1 on a monthly basis for network (if applicable) and school level for all first and second year EMO/CMO schools and all older schools are either 1.1 or better or is between 1.0 and 1.1 and trending positive from immediately prior year OR equivalent acceptable performance based on authorizer requirements
    o The debt-to-asset ratio is less than 0.9 for all EMO/CMO schools OR equivalent acceptable performance based on authorizer requirements
    o
    o Sufficient cash reserves to cover operations for all EMO/CMO schools—all first and second year schools are 30 days + and all older schools are between 30 and 59 days cash on hand and one year trend is positive OR equivalent acceptable performance based on authorizer requirements
• Assumptions about facilities in all financial statements correspond to a conservative facility plan and account for possible contingencies.
• The financial manager has the appropriate expertise to provide accurate and timely financial information to decision-makers.
• The charter applicant group protects mission-critical expenses when faced with budget cuts.
• There is appropriate segregation of financial duties which align to organizational chart and job descriptions.
• Control systems ensure that only allowable expenses will be made and that all expenses will be coded appropriately.
 	
• Projections are based on accurate, conservative, and legally compliant assumptions.

The applicant's response:

Meets the Standard ☐	Approaches the Standard ☐	Does Not Meet the Standard ☐
Strengths of the Applicant's Response:		
Weaknesses of the Applicant's Response:		
Clarifying Questions:		