

Understanding The Charter Application Process

Tips to writing a successful charter application

Florida Charter
Institute



Introductions



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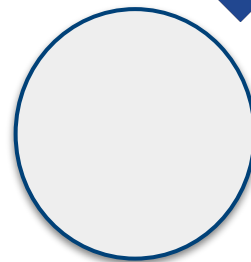


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Download the slides from fci.fyi/20231018

Today's plan...

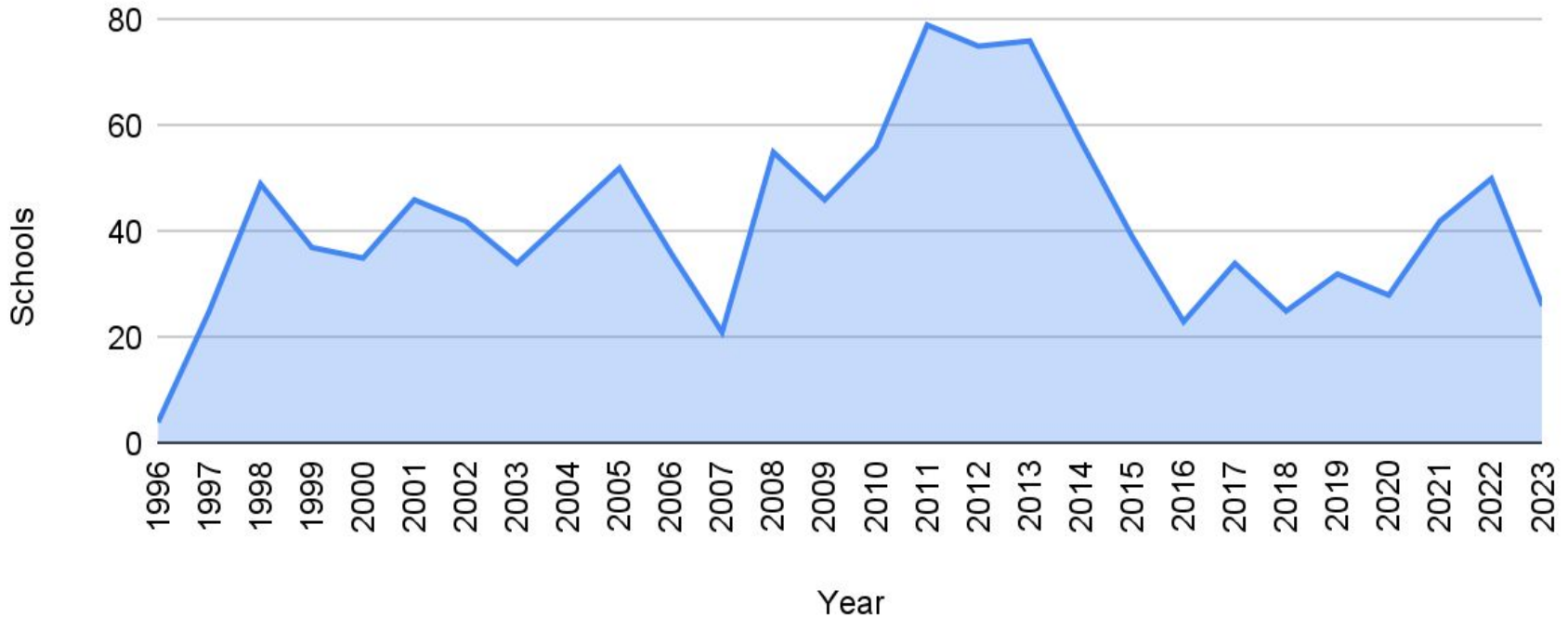


1. Are you sure?
2. The process
3. General tips
4. Section by section
5. After the application
6. Questions

Approved Charters Are Declining



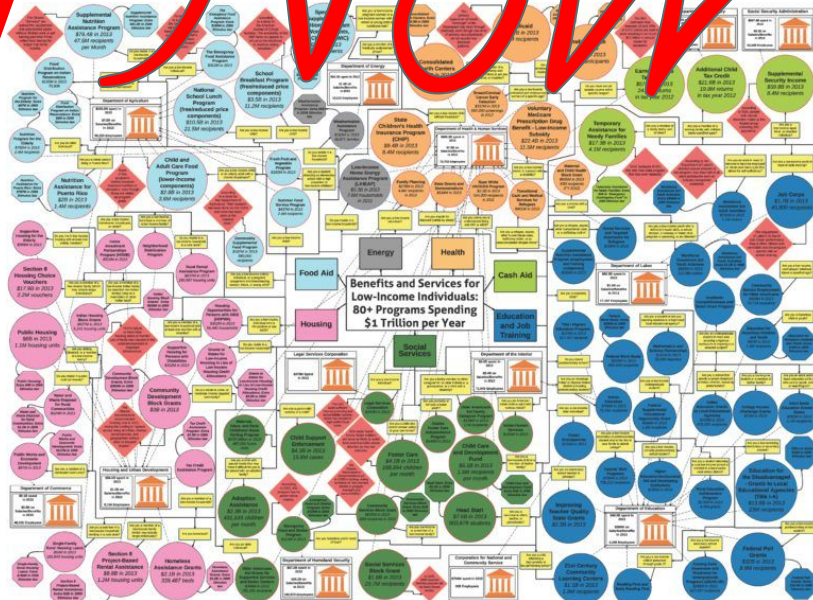
Number of Charter Schools Opened Per Year



Times They Are A Changin'



Then



Source: House Ways and Means Committee staff, using Congressional Research Service reports and other data.

Uphill Road Ahead



- Most districts do not want to approve charters
- Until recently, there is not an alternative path to authorizing *(More on this later)*
- Significant costs before any revenue
- Startup funding is difficult to find
- CSP Startup grant is competitive
 - *(And often not completed prior to opening)*
- Public sentiment is becoming more contentious

... so why do this?



Understand the Law



- 1002.33 – Charter School Statute
- 1002.3301 - Charter School Review Commission
- 1002.345 – Deteriorating Financial Conditions
- 1013.62 – Capital Outlay Funding
- 1002.331 – High Performing Charter School
- 1002.332 – High Performing Charter School System
- 1003.333 – Schools of Hope

<http://www.leg.state.fl.us/Statutes/>



Three distinct pathways to obtaining a charter



Traditional District

- Submit to your school district
- District reviews and evaluates
- Usually an Interview with the district
- District staff recommend to the school board if application should be accepted
- Local School Board makes final decision

- Negotiate a contract with your local school district
- School district is responsible for oversight and sponsoring the school

Florida Review Commission

Rules Get Voted On Today

- Submit to the state commission and a copy to the district
- DOE contracts with a partner to conduct application review
- District is allowed to provide feedback
- Partner will conduct an interview
- Partner recommends decision to the state commission
- State commission meets quarterly and makes final decision

College Authorizer

- Submit to the college, usually in response to a request for proposal
- College has internal review process
- College will usually conduct an interview
- Each college will have it's own governance and approval process
- Negotiate contract with the college
- College is responsible for oversight and sponsoring the school

Must meet statutory requirements

May include extra requirements

No Deadlines

Quarterly Deadlines

RFP will usually indicate deadline

Which Application?



APPLICATION COVER SHEET

NAME OF PROPOSED CHARTER SCHOOL: _____
NAME OF NON-PROFIT ORGANIZATION/MUNICIPALITY UNDER WHICH CHARTER WILL BE ORGANIZED OR OPERATED: _____

If a non-profit organization, has it been incorporated with Florida's Secretary of State?
Provide the name of the person who will serve as the primary contact for this Application. The primary contact should serve as the contact for follow-up, interviews, and notices regarding this Application.

NAME OF CONTACT PERSON: _____

TITLE/RELATIONSHIP TO NON-PROFIT: _____

MAILING ADDRESS: _____

PRIMARY TELEPHONE: () _____ ALTERNATE TELEPHONE: () _____

E-MAIL ADDRESS: _____

Names, roles, and current employment of all persons on applicant group, i.e. anyone with a role in drafting the substantive content of this application or expected to have a significant role with the school, including any consultants or employees of an Education Service Provider. Add lines as necessary.

| Full Name | Current Job Title & Employer | Role with Proposed School |
|-----------|------------------------------|---------------------------|
| | | |
| | | |
| | | |
| | | |

Projected Date of School Opening (Month/Year): _____

Do any of the following describe your organization, or the school proposed in this application?
(Applicant must attach as Attachment A)

- Seeks approval to convert an already existing public school to charter status. *(Applicant must attach as Attachment A evidence of compliance with the timing requirements set forth in section 1002.33(3)(b), F.S.)*
- Will be a charter school-in-a-municipality pursuant to section 1002.33(1)(5), F.S.
- Will be a charter school-in-a-development pursuant to section 1002.33(1)(b)7, F.S.
- Will be a charter school in a development pursuant to section 1002.33(1)(b)7, F.S.
- Will contract or partner with an Education Service Provider (ESP). *(See definition of an ESP in the Addendum, which applicant must complete if using an ESP. If yes, include the provider's portfolio in answering the questions below regarding pending applications and school opening.)*
- Name of ESP: _____
- Seeks approval to replicate an existing school model. *(See definition of a replication in the Addendum, which applicant must complete if replicating a school model.)*
- Seeks approval to replicate an existing High Performing Charter school model pursuant to section 1002.331, F.S. *(Applicant must complete Addendum A1.)*

- Model Florida Charter School Application
- Virtual Charter School Application
- High-Performing Charter School System Replication



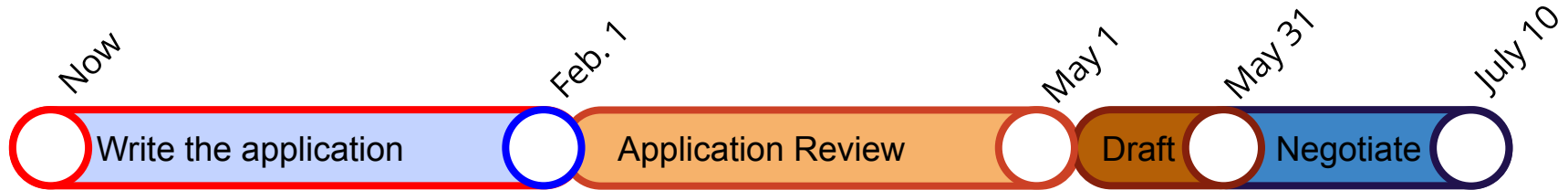
Forms From Florida DOE's Website
fci.fyi/doeforms



Timelines



In an ideal world...



- Sponsor approval/denial 90 days after application
- Draft charter contract to school 30 days after approval
- Negotiate charter contracts 40 days after draft



The district will ask for extension



Almost all districts ask you to voluntarily agree to extend the timelines.

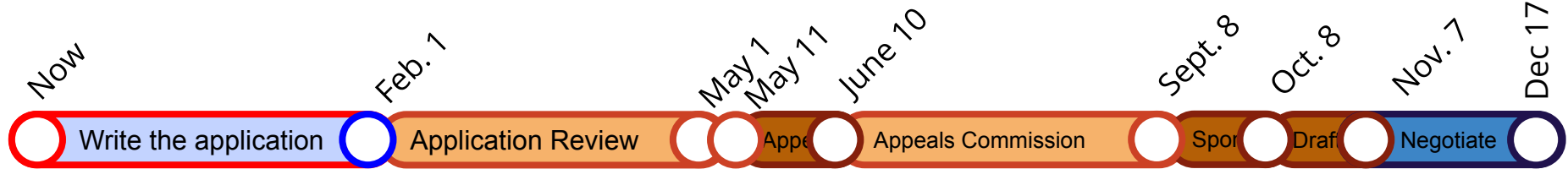
Are you going to start off on a good foot?



Timelines If Denied



According to statute



- Authorizer written denial within 10 days
- 30 days to officially appeal to the state
- 90 days for Appeals Commission and State Board decision
- Sponsor has 30 days to respond

Sponsor Relationship



- You need to build a positive relationship with your sponsor
- Learn about your sponsor's internal process
- Help them understand your vision

General Application Tips



- Set your own deadlines
 - Don't forget "production" timelines.

| | Draft Due | Proof Due | Finalize | Sign Off |
|--------------------------------------|------------------|------------------|-----------------|-----------------|
| Executive Summary | 11/5 | 11/10 | 11/15 | 12/15 |
| Section 1 - Mission | 11/10 | 11/12 | 11/15 | 12/15 |
| Section 2 - Target Population | 11/12 | 11/19 | 11/31 | 12/15 |
| Section 3 - Educational Plan | 11/15 | 11/22 | 11/31 | 12/15 |



START WITH AN OUTLINE!!!

- Make sure things have a place and you're not repeating unnecessarily
- Think through the entire application before writing
- I have a sample [Google Doc](#) if you'd like



General Application Tips



Use the evaluation instrument as you write

Florida Charter School Application Evaluation Instrument

Each section presents criteria for a response that meets the standard, and these criteria should guide the overall rating for the section. The Strengths and Weaknesses boxes provide space to identify data and other evidence that supports the rating. The rationale for each rating is important, especially if some of the data or evidence does not fit neatly into the criteria provided.

Capacity Interview:
Applicants may have the opportunity to present their plan and demonstrate the team's capacity to open and maintain a high-quality charter school as well as to answer questions about their proposal. Any information or evidence from the capacity interview that is used by the sponsor as a basis for denial of the application must be properly documented by means of a recording or transcript.

The following definitions should guide the ratings:

Meets the Standard:
The response reflects a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

Partially Meets the Standard:
The response addresses most of the criteria, but the responses lack meaningful detail and require important additional information.

Does Not Meet the Standard:
The response lacks meaningful detail, demonstrates lack of preparation, or otherwise raises substantial concerns about the applicant's understanding of the issue in concept or ability to meet the requirement in practice.

Authorizers are encouraged to align their application review process with the Florida Principles and Standards for Quality Authorizing.

Would you recommend approval of this application for a public charter school? Explain your recommendation in the Summary Comments section, below.

| | |
|--------------------------|--------------------------|
| DENY | APPROVE |
| <input type="checkbox"/> | <input type="checkbox"/> |

Name of Person Completing Assessment: _____ Date: _____
Title: _____
Signature: _____

Rule 6A-6.0786
Form IEPC-M2
Effective February 2016

Form: IEPC-M2



Forms From Florida DOE's Website
fci.fyi/doeforms



General Application Tips



- Create your budget before you start committing to things in your narrative

- Avoid:
 - Unnecessary repetition
 - Inconsistencies between the application
 - Copying and pasting from other applications

- Outline
- Florida Model Charter School App...
- Table of Contents
- Executive Summary
- I. Educational Plan
 - Section 1: Mission, Guiding Prin...
 - A. Mission and Vision Statem...
 - B. Guiding Principles
 - C. Required Purposes
 - D. Optional Purposes
 - Section 2: Target Population an...
 - A. Student Population
 - B. Geographic Area
 - C. Enrollment Projections
 - D. Projection Methodology
 - E. Rationale
- Section 3: Educational Program ...
 - A. Educational Program

- Normal text
- Title
- Subtitle
- Heading 1**
- Heading 2**
- Heading 3**
- Heading 4
- Heading 5
- Options

and Student Body

school's mission. Applicants should state if they will give

limit the enrollment process, as allowed by law; to certain student populations defined in section 1002.33(10)(d) & (e), F.S. [1]

have enrollment preferences they should be described in Section 14 of the application.

Geographic Area

Identified in Section 16 of this application, state the geographic area which the applicant intends to serve.

C. Enrollment Projections

Provide enrollment projections in the table below for each year of proposed operation. These projections are not enrollment caps. Annual capacity determinations will be made by the governing board in conjunction with the sponsor per section 1002.33(10), F.S.

| Grade Level | Number of Students | | | | |
|-------------|--------------------|--------|--------|--------|--------|
| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| K | | | | | |
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |

Consider collaborative platform

Learn how to use style guides and navigation tools

Section by section ...



1. Are you sure?
2. The process
3. General tips
4. Section by section
5. After the application
6. Questions

What does each section ask for?

Tips to remember for each section.



MAKE A GREAT FIRST IMPRESSION



This section isn't scored, don't get too technical.
Sell your vision! Hook your reader!



1: Mission, Guiding Principles and Purpose

Evaluation Criteria

- A **clear and compelling mission and vision statement** that defines the guiding principles and values of the school.
- Adequate references to evidence that the application fulfills the statutory guiding principles and purposes for charter schools. (Note: the substance of each addressed principle and purpose will be evaluated within appropriate application sections.)

:1 - Mission and Vision



WHAT MAKES YOU UNIQUE!?

WHY DO YOU WANT A CHARTER?

- Have a strong mission
 - Clear, short, repeatable and unique
- Many sections relate back to this mission
- Just answer the questions



Everything ties back to your mission

Your mission is the exception to the rule about not being repetitive.

Tie your plan back to your mission.



2: Target Population and Student Body

Evaluation Criteria

- A clear description of the **students the charter school intends to serve** including any target populations in accordance with Florida law.
- **Alignment** of the targeted student body **with** the overall **mission of the school.**

:2 - Target Population



DO YOU UNDERSTAND YOUR STUDENTS?

- Do you understand your clientele?
- Explain demographics around target
- How did you generate your numbers?
- Are your numbers realistic?



Make sure enrollment matches the budget!

You would be shocked the number of apps I've seen where this doesn't happen.



3: Educational Program Design

Evaluation Criteria

- Is **clear and coherent**;
- Is based on effective, experience- or **research-based** educational practices and teaching methods, and high standards for student learning;
- **Aligns with the school's mission** and responds to the needs of the school's **target population**, and
- Is likely to lead to improved student performance for the school's target population.
- A proposed **daily school schedule** and annual calendar that complies with statutory requirements for annual number of instructional minutes/days and aligns with priorities and practices described in the educational program design.

:3 - Educational Plan



"HOW" YOU TEACH (NOT WHAT)

- Tie programs back to mission
- Schedules need to make sense
 - Show you understand realities of running a school
 - Transitions, lunch periods, teacher schedules, etc.
 - Be sure to calculate minutes
- Find research that shows model will work with your target students
- Be careful to align with your budget



4: Curriculum Plan

Evaluation Criteria

- Provides a **clear and coherent** framework for teaching and learning;
- Is research-based;
- Is **well-aligned with the school's mission** and educational philosophy;
- Provides an **emphasis on reading**;
- Will enable students to attain Florida standards and receive a year's worth of learning for each year enrolled; and
- Will be **appropriate for students below**, at, and above grade level.



“WHAT” YOU TEACH (NOT SO MUCH HOW)

- Each authorizer has their own way of looking at this
 - Some require textbooks, some don't
 - Some want course codes, others don't
 - Some emphasize Student Progression Plan
- Research here is about the efficacy of the curriculum package
- Florida's new law requires explicit phonics instruction (No 3-cue)
- Be sure to focus on supplementary programs and meeting the needs of lower level learners



:4 - Curriculum Plan



- Be careful about standards reference
- Compatible for kids coming from and going to other schools?
- **Be sure to talk about interventions**
- Make sure you address MTSS somewhere
 - Section 4 is one option, section 6 is not
- Be sure your budget matches your curriculum choices
 - The sponsor often knows the prices



Keep a list of all the programs you need

This will help with flushing out your budget and ensuring there is alignment later.



5: Student Performance, Assessment and Evaluation

Evaluation Criteria

- An understanding of **academic accountability** provisions and goals mandated by the state.
- An indication that the applicant will hold **high expectations** for student academic performance.
- **Measurable goals** for student academic growth and improvement.
- **Promotion standards** that are based on high expectations and provide clear criteria for promotion from one level to the next, and for graduation (if applicable).
- Evidence that a range of **valid and reliable assessments** will be used to measure student performance.
- A proposed **assessment plan** that is sufficient to determine whether students are making adequate progress.
- Evidence of a comprehensive and effective plan to **use student achievement** data to inform decisions about and adjustments to the educational program.
- Plans for sharing student performance information that will keep students and parents well informed of academic progress.
- Acknowledgement of and general plan to meet FERPA requirements.

:5 - Student Assessment



HOW WILL YOU KNOW YOU ARE MEETING YOUR GOALS?

- Make sure goals are “SMART” goals
- Look at area schools for PLOP
- Goals should be attainable & challenging
- Be sure to focus on interim assessments
- Include actual schedule for assessments
- Graduation / progression requirements can be a sticking point



6: Exceptional Students

Evaluation Criteria

- A **clear description of the programs**, strategies and supports the school will provide to students with disabilities that will ensure appropriate access for students with disabilities and that the school will not discriminate based on disability.
- A clear description of how the school will ensure students with disabilities will have an **equal opportunity of being selected** for enrollment.
- A comprehensive and compelling plan for appropriate **identification of students with special needs** to ensure they are served in the least restrictive environment possible, have appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities in the same manner as non-disabled students, receive required and appropriate support services as outlined in their Individual Education Plans and 504 plans, and participate in standardized testing.
- An **understanding and commitment to collaborating with the sponsor** to ensure that placement decisions for students with disabilities will be made based on each student's unique needs through the IEP process.
- An appropriate **plan for evaluating the school's effectiveness** in serving exceptional students, including gifted.
- A **realistic enrollment projection (SWD)** and a staffing plan that aligns with the projections.



:6 - ESE Students



YOU ARE REQUIRED TO SERVE ESE KIDS, HOW WILL YOU?

- Fair Warning: The most difficult section
- You must follow the sponsor's policies in ESE.
- Answer the questions.
 - The more you steer off the questions,
the more likely you are to say something wrong
- EXPLICITLY Indicate that the district is the LEA
and that you will follow their policies

READ THEM!





:6 - ESE Students



- If a service is offered at any typical neighborhood school, you must also offer it at your charter
- Do not deny kids based on ESE requirements
- Do not ask about ESE status on application
- Look at the ESE numbers in your district
- Establish a ratio for staffing



Saying you're using inclusion is not enough

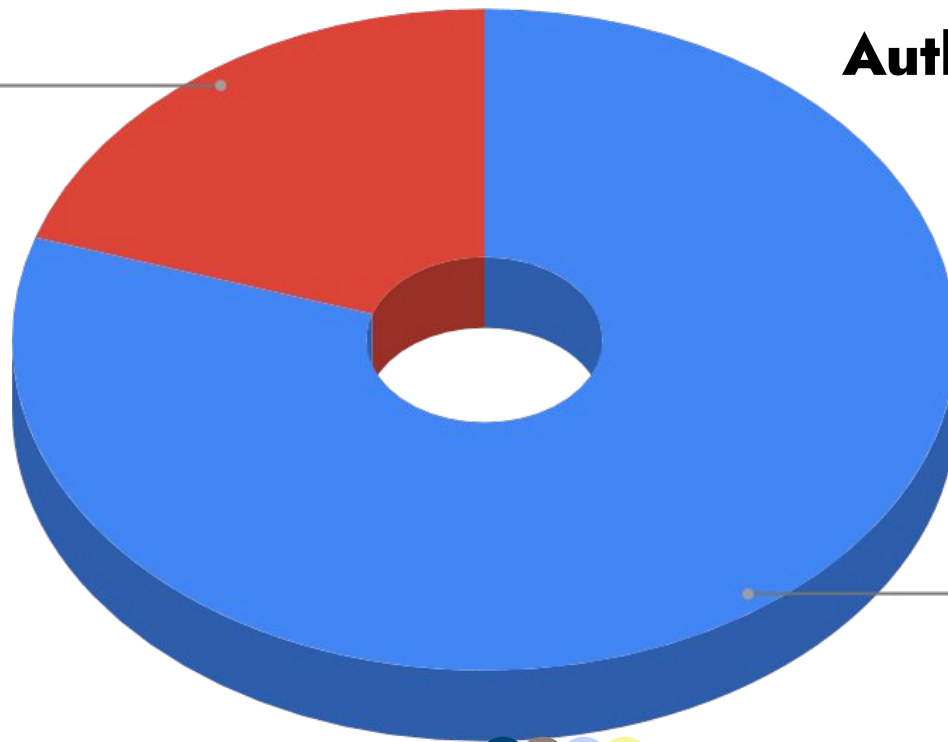
The authorizer wants to know how you will be meeting the needs of the students.



$$80\% + \underline{\mathbf{20\%}} = 100\%$$



ESE
20.0%



**Authorizer is focused
on the 20%,
not the 80%**

Regular
80.0%



:6 - ESE Students



- Helpful to speak with other charters or districts about how ESE works
- Talk about **how** the kids will be serviced
- Don't forget or skimp on the Gifted program



7: English Language Learners

Evaluation Criteria

- Demonstrated understanding of **legal obligations** regarding the education of English Language Learners.
- A comprehensive and compelling **plan for educating English Language Learner students** that reflect the full range of programs and services required to provide all students with a high-quality education.
- A clear **plan for monitoring and evaluating** the progress of ELL students, including exiting students from ELL services.
- Demonstrated capacity to meet the school's obligations under state and federal law regarding the education of English Language Learners.
- A **realistic enrollment projection** (ELL) and a staffing plan that aligns with the projections.



DO YOU UNDERSTAND ESOL REQUIREMENTS?

- Some authorizers are more strict than others
- Charters also must follow the sponsor's/LEA's policy
- Read the Consent Decree
 - League of United Latin American Citizens (LULAC) et al. v. State Board of Education Consent Decree
- Districts are particular about language
 - ELL versus ESOL, names of assessments, folders, etc.
Be sure to read your sponsor's plan.



8: School Culture and Discipline

Evaluation Criteria

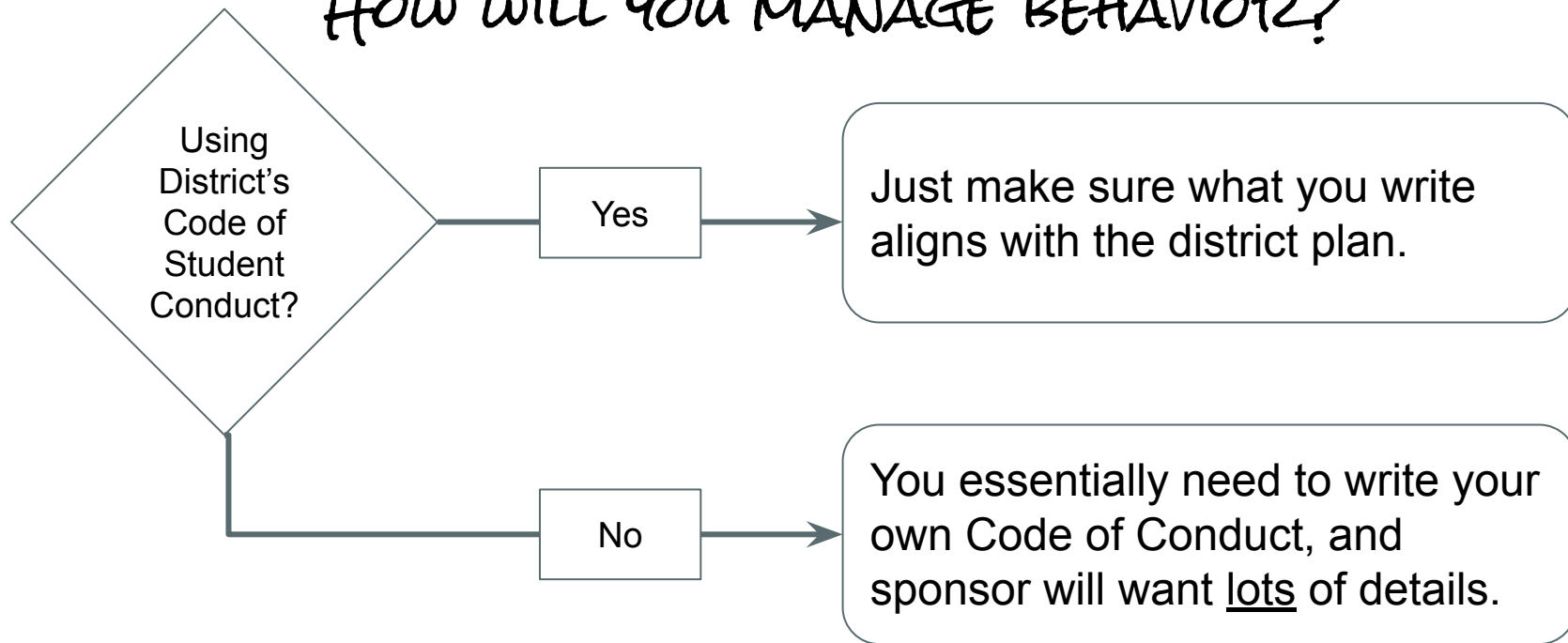
- A **planned school culture that is consistent with the school's mission** and congruent with the student discipline policy.
- An approach to **classroom management and student discipline** that is consistent with the overall school culture and philosophy.
- Recognition of **legal obligations** and children's rights related to enforcing student discipline, suspension, and recommended expulsion, including the school's code of conduct, if available.
- Consideration of how the **code of conduct** will apply to students with special needs.
- Appropriate and clear **roles of school administrators, teachers, staff,** and the governing board regarding discipline policy implementation.



:8 - Culture and Discipline



HOW WILL YOU MANAGE BEHAVIOR?



:8 - Culture and Discipline



- Talk about the culture of the school
 - social emotional components?
- May want to address mental health services
- “Expulsion” is not allowed
 - Only the district school board can expel a student
- Be sure to distinguish unique rules for ESE



9: Supplemental Programming

Evaluation Criteria

- A **clear description** of extra- and co-curricular activities that support, and do not detract from, the educational program.
- Evidence of an **adequate funding source** for extra- and co-curricular activities.
- Lack of supplemental programming may not be a basis for denial.



:9 - Supplemental Programs



DO YOU HAVE AN EXTRA PROGRAMS?

If you add programs, make sure they align with the budget



10: Governance

Evaluation Criteria

- A governing board that is **legally structured**, or has a plan to organize in conformity with the laws of Florida.
- A clear description of the **governing board's roles, powers, and duties** that are consistent with overseeing the academic, organizational, and financial success of the school.
- Appropriate **delineation between governance and school management** roles.
- At least the core of the Governing Board is identified and has a **wide range of knowledge and skills** needed to oversee a charter school.
- A board structure (e.g. bylaws and policies concerning member selection, committees, meeting frequency) that **supports sustainable and effective school governance**.
- Evidence that applicant understands and intends to implement **open meeting and records laws**.
- Clear policy and plan for dealing with **conflicts of interest**.
- Appropriate and clear role for any advisory bodies or councils if included.
- An outline of a **grievance process** (or policy) that will simultaneously address parent or student concerns and preserve appropriate governance and management roles.



WHAT'S YOUR PLAN FOR GOVERNANCE?

- Recommend incorporating as Not-for-profit Corporation
- Sponsor's contract is with your board
 - Board is ultimately responsible, and needs to be competent
- Be aware of Government in the Sunshine
 - Generic bylaws found online may not align



:10 - Governance



- Indicate you will appoint someone (now also in section 15):
 - to facilitate parental involvement, provide access to information, assist parents and others with questions and concerns, and resolve disputes.
- Be careful about conflicts of interests
- Most do not have partner organizations



Governance is one of the #1 reasons for failure

Authorizers will be looking carefully to make sure you have a strong team & plan.



11: Management and Staffing

Evaluation Criteria

- An **organizational chart** or charts that clearly and appropriately delineate lines of authority and reporting.
- A management structure that includes **clear delineation of roles and responsibilities** for administering the day-to-day activities of the school.
- Identification of a highly-qualified **school leader** or a **sound plan** for the recruitment and selection of the school leader.
- A viable and adequate **staffing plan**.
- A sound **plan for recruiting and retaining** highly-qualified and appropriately-certified instructional staff.

:11 - Management & Staffing



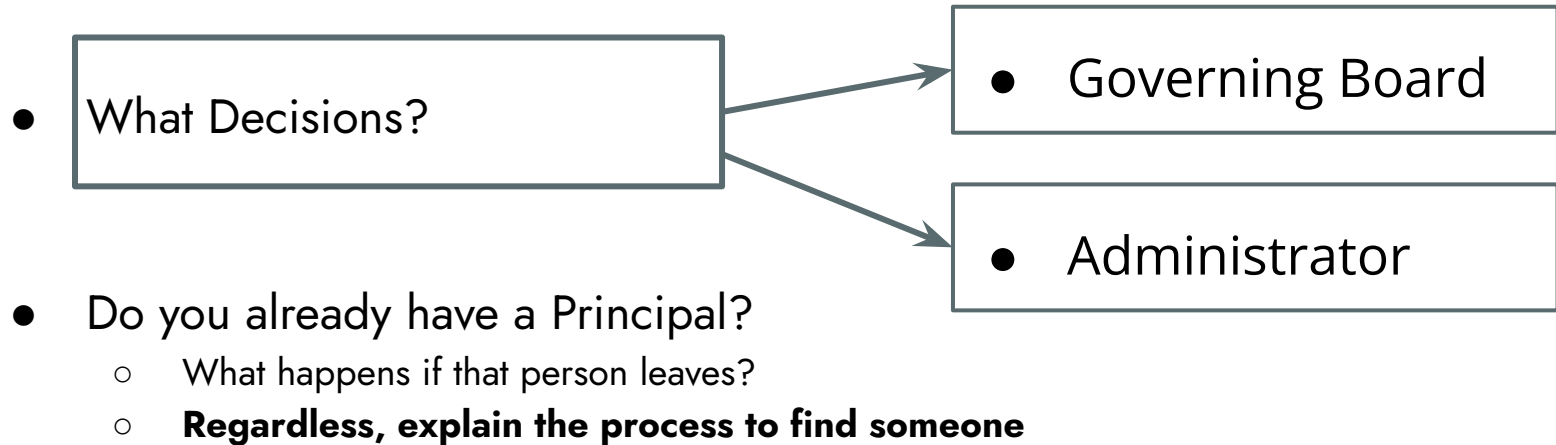
DO YOU UNDERSTAND HOW TO STAFF A SCHOOL?

- Organizational charts – board is in charge
- Who hires the Principal (Board/CMO)
- Recommend Board oversees 1 employee
- Administrator's certification? (*Not "required"*)
- **Staffing chart must match the budget!**
- Be careful about interchangeable titles
 - Secretary = Business Manager (are both in the budget?)

TRIPLE CHECK!



:11 - Management & Staffing





12: Human Resources and Employment

Evaluation Criteria

- A clear explanation of the **relationship between employees** and the school.
- Description of the school leader and teacher **evaluation plans**, or outline of such plans, which align with the Student Success Act as defined by state law.
- A **compensation and benefits plan** or outline of such a plan that is aligned with Florida's Student Success Act, and will attract and retain quality staff.
- **Procedures** that are likely to result in the hiring of highly-effective personnel.
- **Policies and procedures** that hold staff to high professional standards or a plan to develop such policies and procedures.
- An effective plan to address any **leadership or staff turnover**.



HOW WILL YOU SUPPORT AND EVALUATE YOUR STAFF?

- Will you be a public or private employer?
 - *Public = eligible for FL Retirement System. Most are Private.*
- Must align with Student Success Act
 - Review Florida Statute 1012.22(1)(c)
 - Evaluation model must meet statute
 - Pay for performance is required
- How to support struggling employees?
 - What about dismissal?





- Employee Policies
 - Don't need to have them done yet, but have a plan
 - CSU Policy Manual has a sample
 - Be careful about "FMLA" language
- Your Salary < District Salary?
 - If not competitive, how will you be competitive?
- Target at least \$47,500 given Salary Increase Allocation statutes





13: Professional Development

Evaluation Criteria

- Professional development activities for administrators and instructional staff that **align with the educational program** and support continual professional growth as well as growth in responsibilities related to specific job descriptions.



:13 - Professional Development



THINK ABOUT CONTINUOUS DEVELOPMENT FOR STAFF

- Who is responsible for the plan
- Make sure the plan is coherent
- Make sure money aligns with the budget



Be sure to think realistically about your plan

You can not cover everything in the first two weeks before school.



14: Student Recruitment and Enrollment

Evaluation Criteria

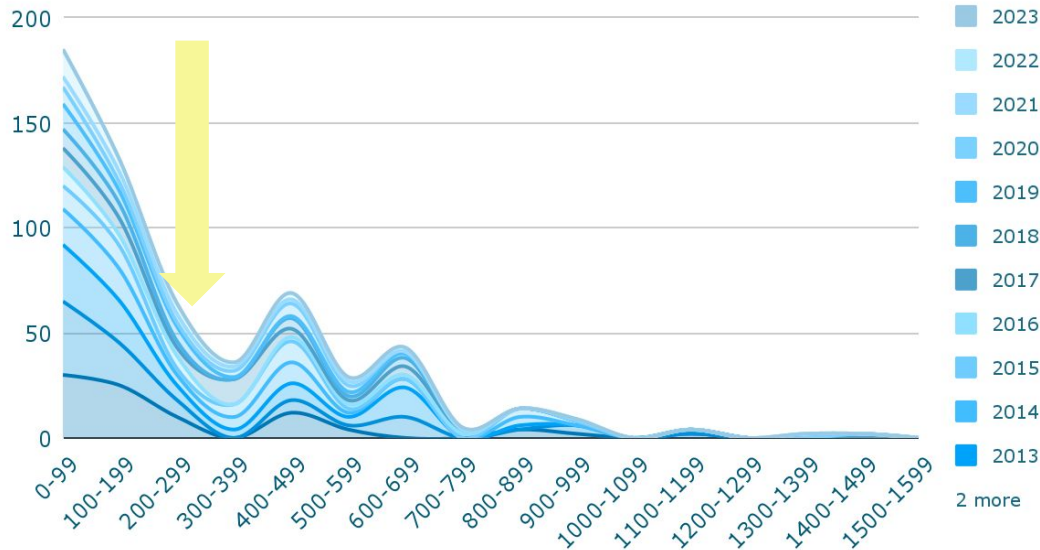
- A **student recruitment plan** that will enable the school to attract its targeted population.
- An enrollment and admissions **process that is open, fair,** and in accordance with applicable law.
- A plan and process that will likely result in the school **meeting its enrollment projections.**

:14 - Student Recruitment



How Will You RECRUIT YOUR STUDENTS?

School Size During First Year of Enrollment



- Almost everyone overestimates enrollment
 - Average charter school startup is 204 students
 - If you are planning to have more than average, you need to have more than average recruiting



:14 - Student Recruitment



- How ensuring equitable / reflective enrollment
- **Never use the term “first come first serve”**
- Describe student application & lottery process
- Be careful for legal traps in application process



- ESE
- Race
- Other protected status



15: Parent and Community Involvement

Evaluation Criteria

- A general conception of **how parents will be involved** with the school that aligns with the school's mission and provisions of the educational program. A detailed plan may be developed following approval.



How will you involve and inform your families?

- Some authorizers want to see evidence of demand
- SAC is not legally required
 - Be careful about committing yourself
- Avoid parent contracts
- New question asks about representative to facilitate parental involvement.



16: Facilities

Evaluation Criteria

If a facility is not yet acquired, reviewers will look for:

- A **realistic** sense of facility **needs**.
- A **plan and timeline** for securing a facility that is appropriate and adequate for the school's program and targeted population.
- Reasonable projections of facility requirements.
- Evidence that the school has the necessary **resources to fund** the facilities plan.
- Adequate **facilities budget** based on demonstrated understanding of fair market costs.

If you have a facility, they will also look to see if it complies with applicable laws, and what your back up plan is.



:16 - Facilities



WHAT IS YOUR PLAN FOR YOUR SCHOOL'S FACILITY?

- Facilities are the most common delays
- Make sure your timeline makes sense
- Most applicants do not have a site yet
 - *Questions F-I are generally easier to answer*
- Back-up plan is important, construction often takes longer than anticipated





:16 - Facilities



- Be thorough in what you need for building
- Generally at least 55 sq.ft. per student
 - *Your program may require more space*

COSTS MUST ALIGN WITH THE BUDGET



17: Transportation

Evaluation Criteria

- Reviewers will look for an outline of a reasonable **transportation plan that serves all eligible students** and will not be a barrier to access for students residing within a reasonable distance of the school.



WHAT IS YOUR PLAN FOR TRANSPORTATION?

Florida Statute
1002.33(20)(d)

The charter school and the sponsor shall cooperate in making arrangements that ensure that transportation is not a barrier to equal access for all students residing within a reasonable distance of the charter school as determined in its charter.

- Most districts will not contract with charters
- Read the statute (1006.21 - 27)
- School is responsible (even if contracting)
- Sponsor may be suspicious if no transportation



18: Food Service

Evaluation Criteria

- A food service plan that will **serve all students** and makes particular provisions for those students who may qualify for free or reduced price lunch.
- A food service plan that places an emphasis on quality, healthy foods.



WHAT IS YOUR PLAN FOR SCHOOL LUNCH?

- Most districts will not contract with charters
- Nearly impossible to open as NSLP Sponsor
 - If bureaucratic expert earliest possible is October – November
 - Realistically, probably Spring
 - How will you cover costs?
- Demonstrate you understand NSLP
 - i.e. give out forms, keep it confidential, ensure you meet nutrition requirements, etc.
- Most charters outsource food prep
 - Warmers are usually provided, indicate you will ensure health standards are met.



19: School Safety and Security

Evaluation Criteria

- A **plan that reasonably ensures the safety of students and staff** and the protection of the school facility and property. Note that a fully-developed plan will be completed after approval of the application.
- A description of how the school plans to comply with the requirement that at least **one safe-school officer is present while school is in session.**
- Procedures that clearly demonstrate a **plan to respond to active assailant incidents.**
- A description of how the school plans to **train school staff** to respond to active assailant incidents.
- A description of how the school will establish a **team to assess and intervene with individuals** whose behavior may post a threat to the safety of staff or students.

:19 - Safety & Security



DO YOU UNDERSTAND SCHOOL SAFETY REQUIREMENTS?

- Understand Marjory Stoneman Douglas Act
- Your plan for security and/or guardians?
 - How are you paying for that?
- Safety plan does not need to be done
 - But have a plan for who is doing it and when it will be done
- Also need to address your safety team and reporting requirements



Since 2018 there have been many changes

Be sure you are always looking at recent information when researching this.



20: Budget

Evaluation Criteria

- **Budgetary projections** that are consistent with and support all key aspects of the application, including the school's mission, educational program, staffing plan, and facility.
- A **realistic assessment** of projected sources of revenue and expenses that ensure the financial viability of the school.
- A **sound plan to adjust the budget** should revenues not materialize as planned.

:20 - Budget

Budget is the easiest way to deny an application



MUST ALIGN
WITH THE
ENTIRE
APPLICATION



:20 - Budget



DO YOU HAVE THE CAPACITY TO BUDGET AND FUND SCHOOL?

- Keep log / flag every budget issue in app
- Check if authorizer has required/preferred forms
 - CSU Budget Template is available - some require
 - Some have contingency levels required
- Start up Funds will likely be required
 - Where will they come from?
 - Must provide evidence





:20 - Budget



- Use only guaranteed sources of income
 - Do not include the CSP grant
 - Try to avoid fundraising
 - Do not use Title 1 Funds
 - IDEA Funds are difficult to budget
- Include a reserve fund
 - There will be expenses you don't expect
 - Some authorizers want to see specific reserve amounts



The budget is not make believe, but it sort of is

Everyone knows the budget will change (a lot) between application and opening.



:20 - Budget



- Will probably have less than projected FTE
 - Contingency budgets explore the “what ifs”
- Narrative – The budget itself is not enough
 - Describe how you are making decisions.
 - Facilities and staff are largest, be sure to explain
- How is the board involved in the process?
 - How will it monitor/adjust as necessary



21: Financial Management and Oversight

Evaluation Criteria

- A clear description of **how the school's finances will be managed**, including who (or what contracted entity) will manage the finances. Such plan should contain strong internal controls to ensure appropriate fiscal management and ability to comply with all financial reporting requirements.
- A plan for the **governing board to regularly exercise oversight** over and take accountability for all financial operations of the school.
- Provisions for an **annual financial audit**.
- Appropriate **public transparency** of school financial health.
- Appropriate plan to securely store **financial records**.
- A plan to obtain appropriate and reasonable **insurance coverage**.



DO YOU HAVE ADEQUATE SAFEGUARDS TO PREVENT FRAUD?

- Be careful about staff titles and roles
- Separation of duties / checks and balances
 - Authorizers want to ensure you can prevent fraud
- Annual audit (*will follow required RFP Process*)
- Use model charter contract for insurance



22: Start-Up Plan

Evaluation Criteria

- Reviewers will look for a thoughtful and realistic **implementation plan** that covers major operational items and provides flexibility for addressing unanticipated events.

:22 - Start-Up Plan



DO YOU HAVE REALISTIC UNDERSTANDING OF WHAT YOU'RE IN STORE FOR OVER THE NEXT YEAR?

- Must align with the rest of your application
- Assign deadlines and positions
- Realistic outline of what needs to be done
- If you have deadlines anywhere in the app, repeat them here



Writing the application is the easy part...

Opening a school is much more difficult, show you understand what is involved.

New School Checklist



- Narrative task lists of things to be completed for starting a new school
- Broken down by phases and topics
- A reference for things to think about
- If you have ideas for additions, please share





Additional Attachments & Addendums

Evaluation Criteria

- Statements of Assurance
- Board Member Information Forms
- Replications Addendum
- High-Performing Replications Addendum
- Education Service Providers Addendum



Educational Service Providers Addendum

Evaluation Criteria

- The ESP section should provide a **rationale** for contracting with the ESP, evidence of ESP success in operating high-quality charter schools, the **capacity** of the ESP to successfully operate this school, and **evidence** that the governing board and ESP are able to **operate free from conflicts of interest**.



- **The Governing Board is still in charge!!**
- Districts often suspicious of ESP
- Clearly describe the arms-length relationship
- Is Governing Board of ESP starting the school?
- Breaking up is messy, have you considered?
- Does the ESP have a positive history?

ESSENTIAL!!



What Happens After Submitting?



- 90-days to review application
- Most authorizers have “capacity interview”
 - Send as many board members as possible
 - Don’t want consultants talking
 - Be as familiar as possible with the application
- Many authorizers will ask you to withdraw
 - Then they don’t need to deny

CSP Grants



- Charter Schools Program Grant
- Charter application = CSP grant application
- Suggest reading the latest CSP RFP
- CSP capacity interview can be more difficult than the district interview



Appeal Process



- Hire an attorney
 - Include attorney before you decide whether to appeal
 - If you appeal, you will want an an attorney
 - Likely will be costly
- Appeal commission will review
 - Made up half of authorizers and half of charter school representatives
 - They make a recommendation to the State Board of Education
- Some districts have even gone to court to prevent a decision of the State Board



Any Questions?

Introductions



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