

Thomas B. Fordham Foundation Charter School Application Evaluation Rubric

Expectations

Reviewers are tasked with reviewing the entirety of an application and providing the Fordham Foundation with a comprehensive analysis of the application. Reviewers are also tasked with raising questions and noting areas of concern, as necessary. Feedback is submitted via the evaluation rubric contained in the Foundation's online application management system, EpiCenter. Reviewers must attend training on the review process annually. After completing the training, reviewers will read the application and provide written feedback. Additional information (due diligence) will be provided to the team prior to a debrief conference.

Application Process

A team of evaluators will review applications and interview applicants. Interviews will take place in the Fordham Dayton office and will include the school developer and/or school leadership, governing authority and financial representative. If the school is applying to change sponsors, the current sponsor will be interviewed separately. Evaluation Teams are comprised of evaluators with experience and expertise in a variety of fields, including but not limited to curriculum and instruction, special student populations, law, governance, management, leadership, finance, school start-up, accountability and policy. If an application includes an area of specialization (e.g., career technical program or dropout prevention and recovery program), at least one reviewer will have expertise in that area.

The review consists of the following tasks:

- Reviewer training conference call
- Read and provide written feedback in EpiCenter for each application submitted
- Due diligence information provided to team
- Team lead reviews all individual rubrics and prepares outline for debrief conferences
- Team debrief conferences on each evaluation (via teleconference)
- Interview agendas developed
- Applicants notified of interview dates, agenda (including time, location, attendees, subject matter) forwarded to applicants
- Interviews
- Team lead drafts final analysis and submits to EpiCenter
- Fordham staff provides a recommendation to the board
- Fordham boards makes approval or non-approval decision
- Applicants are notified of the decision by Fordham

Conflict of Interest and Confidentiality Statement

All reviewers, internal and external, must complete the Fordham Foundation's Conflict of Interest Disclosure and Confidentiality Statement. Fill out the disclosure accordingly, and submit by email to Theda Sampson (tsampson@fordhamfoundation.org). Please notify Theda as soon as possible if you believe there is a conflict or the appearance of a conflict.

Public Records

Please note that any notes, communication, etc., related to the application review may constitute a public document and may be subject to Ohio's open records laws.

Questions

Reviewers are always welcome to contact Theda at any time with any questions or concerns about the application, review process, or related issues.

Instructions

Evaluators will use the following Evaluation Rubric to rate applicant responses to the questions in the Request for Application for each standard. Within each section, specific criteria define the expectations for an excellent response that ‘Meets the Standard.’ There are 22 total standards, and applicants must receive a cut score of 49.5 points (meeting 75% of the total possible score of 66) and the review team must agree to recommend that the application be considered by the Fordham board. Reviewers should complete the summary scoring table and narrative at the end of the evaluation rubric.

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 advance the academic achievement (i.e., boost the skills and knowledge) of students attending the proposed 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.

Partially Meets the Standard:

The response meets the criteria in some respects but has substantial gaps in a number of areas.

Does Not Meet the Standard:

The response is sorely under-developed 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.

Mission and Vision

Education Plan: A.1.

A.1. Mission, Vision, and Educational Philosophy

A strong application will include:

1. The school’s mission and vision for how the school operates including the school’s educational foundation and the culture or ethos.
2. Include an overview of the instructional methods and any research, data or experience that indicates why they use this approach with their student population.

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Individual Section Rating/Points: Meets, Approaches, Partially Meets, Does Not Meet	

Education Plan: A.2.

A.2. Geographic Boundaries

A strong application will include:

1. A description of which of the following options the school will choose.
 - (a) Prohibit the enrollment of students who reside outside the district in which the school is located;
 - (b) Permit the enrollment of students who reside in districts adjacent to the district in which the school is located;
 - (c) Permit the enrollment of students who reside in any other district in the state.

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Education Plan: A.5.

A.5. School Calendar and Daily Schedule

A strong application will include:

1. Attachment B: School’s current calendar showing the number of days the school will be in session
2. Attachment C: Two sample daily class schedules showing daily hours of operation and allocation of time for core instruction, supplemental instruction, extra-curricular activities, and after-school activities, as applicable.
3. Completed table detailing instruction time, staff development aligned to the education plan and budget.

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Education Plan: A.9.

A.9. Assessment

A strong application will include:

1. All Ohio public charter schools are required to administer state assessments. Indicate any *additional* assessments the proposed charter school will administer.
2. The school’s approach to assessment. Explains how the school will evaluate progress of individual students, cohorts over time, and the school as a whole. Describes how the school will use interim assessments to gauge student learning and modify instruction.
3. Indicates the person(s), position(s) and/or entities that will be responsible and involved in the in collection and analysis of assessment data.
4. A description of any formative assessments used and how and when they will be used.
5. Discuss student progress reports, report cards and any other ways of tracing pupil progress and providing information to teachers, parents, etc.
6. Description of how the school will provide teachers and staff with information about progress/lack of pupil progress to facilitate corrections.
7. The school’s policies and criteria for promotion and retention of students.

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Capacity to Execute the Plan

Education Plan: A.10.

New Schools and Schools Seeking a Change in Sponsor: A.10 Prior Success in Raising Student Achievement

A strong application will include:

1. Documentation of prior success in improving student achievement.
2. Include supporting data showing evidence it has increased student achievement in the populations to be served, in multiple subjects by using the model proposed in the application.

Section B: Financial Plan

B.1 Budget

A strong application will include:

1. Completed budget template showing financial sustainability.
2. Detailed assumptions of the calculations used to estimate revenues and expenditures must be included for each line item.
3. Calculations that tie into the educational plan, staffing plan, operational plan and facilities.

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B.2 Financial Management

Business Plan

A strong application will include:

1. SMART Business goals.
2. A description of the systems and procedures for managing the school’s finances which identify the staff position(s) that will be responsible for financial oversight and management, as well as their relevant qualifications to manage this work.
3. Identify any vendors or plans to obtain vendors that will be used to support finance and operations.
4. If using an education management entity, the three most recent years of the entity’s audited financial statements should be available.

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B.3 Transportation, Food Service, Other Partnerships

A strong application will include:

1. If the school intends to provide transportation for students the transportation plan including those with special needs, and include budget revenue and expenditure assumptions.
2. Description of the school's plans for providing food service in compliance with law.
3. Health services provided in compliance with law.
4. Any other partnerships or contractual relationships central to the school's operations or mission.

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2. Timelines and schedules for pre-opening.

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Governance Plan:

Governance and Management Structures

C.1. and C.2 Governing Body and Board Composition

A strong application will include:

1. A brief description of the governing board, its history, and its current operation.
2. The governing board’s view of the relationship between itself and the school leader and management entity (if any).
3. Training the board plans to obtain which include a timetable, topics to be addressed and requirements for participation.
4. Any current or founding board members listed in C.2 should have a resume in Attachment J. If members are not listed, the application should include a description of board members including desired experience and qualifications.

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C.3 Management and Operations

A strong application will include:

1. A description of the organizational structure of the school and its day-to-day operation that aligns with the education plan and budget.
2. An explanation of the management roles and responsibilities of key administrators with respect to:
 - Instructional leadership
 - Curriculum development and implementation
 - Personnel decisions
 - Budgeting
 - Financial management
 - Legal compliance
 - Any special staffing needs
3. How the school will handle/currently handles back office support, including state data entry.
4. Provide qualifications, credentials and/or resume of principal or principal candidate.
5. An organizational chart that clearly presents the school’s organizational structure, including lines of authority and reporting between the governing board, staff, any related bodies (such as advisory bodies or parent and teacher councils), and any external organizations playing a role in managing the school.

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Staffing Plan

C.4 Staffing and Human Resources

A strong application will include:

1. Plans for recruitment (how and from where staff at all levels will be recruited); the identification and selection of staff; any initial orientation, training or staff development; and plans for performance evaluations.
2. Job descriptions for all staff members, employment benefits offered, and estimated salary ranges.
3. Why the applicant believes that it will be able to consistently recruit and retain high quality staff for teaching and other positions.
4. How the school will ensure that its teachers and school leaders are aligned with the school’s mission and programming, and capable of successfully executing both.
5. How the school will evaluate its teachers, administrators and other staff.
6. How the governing board and school administration will handle any unsatisfactory staff performance, as well as staff turnover and leadership succession.
7. Any incentive or rewards systems the school plans to use for staff.
8. A staffing chart for the school’s first year, and a staffing plan for the term of the charter **(Attachment M)**
9. A copy of the proposed school personnel policies or staff handbook **(Attachment N)**.

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C.5 Professional Development

A strong application will include:

Applicant Instructions:

1. The professional development opportunities that will be offered to teachers and staff.
2. The lead person responsible for developing, implementing and evaluating professional development plans.
3. How professional development will include and support both general and special education teachers.
4. How the professional development program is aligned with the school's pedagogy and curriculum.
5. How the professional development program will be evaluated to assess its effectiveness and success, and how the program will be modified to support identified teacher needs.
6. A schedule for professional development (**Attachment O**).

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C.8 Parent Engagement

A strong application will include:

1. How the school will keep parents/caregivers informed regarding their students' educational performance, progress, concerns or other issues.
2. Description and/or example policies, programs, and practices to ensure parental involvement.
3. How parents/caregivers will be enlisted as educational partners (e.g., homework, discipline).
4. Procedures to respond to parental complaints.

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APPLICATION REVIEW SCORING

List the number of standards that meet, approach, partially meet or do not meet the standard.

Meets the Standard	Approaches the Standard	Partially Meets the Standard	Does Not Meet the Standard
Number of standards X 3 =	Number of standards X 2 =	Number of standards X 1 =	0

Total points =

Summary Narrative