

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 any areas of concern. 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, they 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 forwarded to applicants (including time, location, attendees, subject matter)
- Interviews
- Team lead drafts final analysis and submits to EpiCenter
- Fordham staff provides a recommendation to the board's Ohio Committee
- Ohio Committee transmits recommendations to the full Fordham board
- Fordham board 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. A clear, cogent, and coherent statement of the school’s mission and vision for how the school operates including the school’s educational foundation and the culture or ethos.
2. A thorough overview of the instructional methods that the school will use together with research, data, or experience that indicates why they expect this approach to be effective with their student population.

Concerns	Page
Strengths	
Interview Questions	
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.

Concerns	Page
Strengths	
Interview Questions	
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Education Plan: A.3.

A.3. Curriculum and Instruction

A strong application will include:

1. A thorough description of the school’s curriculum or curricula and pedagogy combined with solid evidence of its efficacy when delivered competently to students such as those intended to be served at the applicable grade levels. **Especially for K-8 applicants, and particularly in English Language Arts (ELA) and mathematics, Fordham expects schools that it sponsors to use curricula that are highly rated by EdReports.org and/or the What Works Clearinghouse; the application must include that rating information for each curriculum component.** In any part of the school’s proposed curriculum where such ratings do not exist, the applicant must provide other evidence, research, or convincing experience to show why it is expected to be successful with the proposed student population.
2. Measurable objectives and subject area content and skills for each grade level in all core subjects including but not limited to those that are subject to Ohio state assessments.
3. How the chosen curriculum aligns with the Ohio content standards.
4. The specific instructional strategies that will be employed to ensure effective implementation of the curriculum. Organizational arrangements (e.g. classroom-based or independent study, blended learning, and class structure) as well as teaching methods.
5. A description of how the proposed curriculum-and-instruction plan will meet the educational needs of at-risk students, students with disabilities, advanced learners, and minority youth.
6. The procedures and metrics by which the school will regularly—as in “continuous improvement”—

monitor the effectiveness of its instructional program and swiftly make adjustments as needed and may include organizational and personnel arrangements as well as curriculum and pedagogy.

7. How the school will develop sound student character, citizenship and civic understanding, social and emotional wellbeing, and physical health.
8. All Attachments. For core subjects, sample lessons from two different grade levels (Attachment A) that illustrate strategies for implementation of the curriculum consistent with the mission and educational philosophy of the school.

Concerns	Page
Strengths	
Interview Questions	
Individual Section Rating/Points: Meets, Approaches, Partially Meets, Does Not Meet	

Market Research

Education Plan: A.4.

A.4. Target Population

A strong application will include:

1. Description of the population of the school and how the proposed mission, curriculum, teaching methods, and services align with the educational needs of that population.
2. Leadership team’s experience serving similar student populations.
3. Market research of the target neighborhoods and/or student populations, analysis of student and student subgroup(s) academic (and other, if applicable) needs to be served by the proposed community school which are not met by existing schools in the area or community.

Concerns	Page

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

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 each year as well as any planned summer instruction for whatever reason (e.g., remediation, acceleration, electives).
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.

Concerns	Page
Strengths	
Interview Questions	

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

Education Plan: A.6.

A.6. Special Student Populations

A strong application will include:

1. The school’s philosophy regarding educating special student populations, including but not limited to strategies for student recruitment, retention, and support.
2. The school’s plans for identifying and successfully serving the following students in order to comply with applicable laws and regulations: students with disabilities, students with Limited English Proficiency (LEP), homeless students, gifted and talented students. This should include progress monitoring, staffing, and how the school will determine changes and adjustments to its program if progress in any special student population groups is not satisfactory.
3. How the school’s curriculum and approach to instruction will be designed or adapted to serve those students.

Concerns	Page
Strengths	
Interview Questions	
Individual Section Rating/Points: Meets, Approaches, Partially Meets, Does Not Meet	

Education Plan: A.7.

A.7. School-Specific Goals and Objectives

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

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.

Concerns	Page
Strengths	
Interview Questions	
Individual Section Rating/Points: Meets, Approaches, Partially Meets, Does Not Meet	

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. A description of the internal controls that will ensure that the governing authority’s capacity to protect the interest of the school and how its internal controls will ensure that public funds are used properly.
5. If using an education management entity, the three most recent years of the entity’s audited financial statements should be available.

Concerns	Page

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

B.3 Transportation, Food Service, Other Partnerships

A strong application will include:

1. A transportation plan (if the school intends to provide transportation for students) including those with special needs, including 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.

Concerns	Page
Strengths	

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

TYPE YOUR RESPONSE TO B.3 BELOW:

B.4 Insurance

A strong application will include:

1. A quotation/letter that describes the level of insurance coverage that will be obtained.

Concerns	Page
Strengths	
Interview Questions	
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Capacity to Execute the Plan

B.5 Pre-Opening Plan

A strong application will include:

1. A pre-opening plan that documents key tasks to be completed between approval of the application and opening of the school, including but not limited to: activities associated with finance, leadership, facilities, state obligations, students, parents and community.
2. Timelines and schedules for pre-opening.

Concerns	Page
Strengths	
Interview Questions	
Individual Section Rating/Points: Meets, Approaches, Partially Meets, Does Not Meet	

Governance Plan:

Governance and Management Structures

C.1. Governing Body

A strong application will include:

1. A brief description of the governing board, its history, and its current operation. Provide the governing board’s view of the relationship between itself and the school leader and management entity (if any).
2. A discussion of 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. Include a timetable, topics to be addressed and requirements for participation.
4. If a management company is to be involved, documentary evidence of the board’s independent authority to dismiss, replace, discipline or sanction that company should this prove necessary.

5. Training that the board will obtain to ensure its capacity to fulfill all of its duties and responsibilities, including a timetable, topics to be addressed and requirements for participation.
6. A description of the board’s plans to recruit, train and retain additional and/or future board members, including the board’s succession plan.
7. A description of the board’s plan for regular evaluation of the school leader and, if applicable, the management company.
8. A description of the board’s plan to identify and recruit a suitable school leader at such time as it may be necessary to find a replacement or successor for the initial school leader.

Concerns	Page
Strengths	
Interview Questions	
Individual Section Rating/Points: Meets, Approaches, Partially Meets, Does Not Meet	

C.2 and Board Composition

A strong application will include:

1. The excel sheet with the members of the proposed governing board including their names and current employment. The sheet should include board members’ relevant experience or qualifications for serving on the board including, but not limited to, their relationship to the community in which the school will be located and their membership on any other boards.
2. A brief description of the governing board and the capacity and commitment of its members to supply the school with the full range of experience, expertise, and dedication needed to ensure thorough oversight and direction of its successful operation.
3. Any current or founding board members listed in the excel sheet 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.
4. An explanation of how board competencies and expertise align with the proposed school’s mission statement

and understanding of governing authority responsibilities.

Concerns	Page
Strengths	
Interview Questions	
Individual Section Rating/Points: Meets, Approaches, Partially Meets, Does Not Meet	

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.

Concerns	Page

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

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**).

Concerns	Page
Strengths	

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

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**).

Concerns	Page
Strengths	
Interview Questions	

C.6 Student Recruitment and Enrollment

A strong application will include:

1. The plan for recruitment and enrollment of students.
2. How the school will be publicized and marketed throughout the community to a broad cross-section of families and prospective students.
3. The school's plans and timelines for the school's recruitment, enrollment, and admission process (including lottery).
4. Documents related to student enrollment (e.g., enrollment forms).
5. Enrollment policy that is in alignment with law and does not discriminate.

Concerns	Page
Strengths	
Interview Questions	
Individual Section Rating/Points: Meets, Approaches, Partially Meets, Does Not Meet	

C.7 Community Partnerships

A strong application will include:

1. A list of community partners and how they support the school.
2. The impact of the school on the community and students and what process was used to assess local need and provided evidence of community support.

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

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