THOMAS B. FORDHAM FOUNDATION

Charter School Sponsorship

New School Application

Standard Pathway

Fall 2026 Application Cycle

Submission Deadline: July 23, 2026

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Before You Apply

What Fordham looks for in a sponsored school

Fordham sponsors community schools because we believe great schools change lives — and because Ohio families deserve community schools that are worth choosing. Sponsorship is an act of public trust. We take it seriously. Before you complete this application, we want you to know clearly what we are looking for, what we believe about teaching and learning, and how this application fits into a broader conversation we will have with you about the school you want to build.

What is a Fordham-Sponsored School?

Fordham-sponsored schools vary somewhat in mission, model, and student population. We do not seek uniformity. But every Fordham school is expected to embody five commitments:

Pillar	What Fordham Expects
Instructional Excellence	A clear, coherent instructional model grounded in the science of learning, executed consistently across classrooms, and continuously strengthened through quality professional learning and exceptional instructional leadership.
Student Outcomes	Demonstrable academic growth and solid achievement, measured honestly against state standards and peer benchmarks. We take assessment results seriously, mindful that great schools also do much for their students that doesn't show up in test scores. .
Strong Attendance	Students are regularly in school and in class. Chronic absenteeism is a grave threat to children's futures–and to the school's.
Sound Governance and Financial Management	A well qualified board that provides genuine oversight, financial practices that are transparent and sustainable, and compliance that is complete and timely.
Mission Integrity and Student Focus	A clear, coherent mission focused on serving students — particularly those from low-income families and underserved communities — and a demonstrated commitment to fulfilling it.

The Instructional Excellence Framework

Fordham's Instructional Excellence Framework (IEF) describes what we mean by high-quality teaching and learning. It is organized around the cognitive science of learning and eight observable elements of instructional practice. The IEF is how we evaluate the instructional plan you submit.

We strongly encourage you to read the full IEF before completing Section 2.1 in order to understand the standard your model will be measured against.

The Eight Elements	What This Element Looks At
1. Intellectual Preparation	Lesson preparation happens before the lesson begins — teachers internalize content, anticipate misconceptions, and design exit tickets aligned to the objective.
2. Culture for Learning	The classroom is structured, warm, and high-expectation simultaneously — joy and high expectations build the conditions where learning can happen.
3. Securing and Sustaining Attention	Attention is the gateway through which all learning passes — teachers secure it at the start of a lesson and sustain it throughout.
4. Clear Instructional Delivery	New content enters student long-term memory through precise, sequenced, cognitively manageable explanations and modeling that narrates thinking aloud.
5. Student Thinking and Cognitive Lift	The majority of the lesson is spent with students thinking, writing, talking, and doing — when they struggle, teachers scaffold up rather than water down.
6. Checks for Understanding	Whole-class techniques generate accurate evidence of every student's understanding in real time — and instruction adjusts in the moment when checks reveal confusion.
7. Independent Practice and Consolidation	Independent practice and retrieval practice are the twin engines of consolidation — what makes new learning durable over time.
8. Tiered Support and Intervention	Students needing additional support are identified proactively and receive instruction that holds the same expectations as Tier 1 — more support, never less rigor.

What Strong Applications Look Like

Strong applications share a few qualities. We name them here so applicants can self-assess before submitting.

- Specificity over generality. We are looking for what your school will actually do — not what it values. "We will use frequent formative assessment" is a value statement. "Teachers will administer exit tickets aligned to the lesson's learning goal at the end of every lesson; data is reviewed before the next day's instruction" is a practice statement. We are looking for the latter.
- Coherence across sections. Strong applications hang together. The instructional model in Section 2 should align with the staffing plan in Section 5. The performance goals in Section 2 should be supportable by the budget in Section 6. Coherence is one of the most important things we look for.
- Honesty about risk. Every new school faces risks. Strong applications name them — about leadership transitions, about enrollment ramps, about academic gaps in the population they will serve — and describe how the school will manage them. Weak applications pretend they do not exist.
- Evidence over assertion. Where we ask for evidence — of community need, of prior success, of the research base for your model — provide it. "Strong community demand" is an assertion. Letters of support from named community organizations, paired with demographic and school-performance data for the catchment, is evidence.
- Brevity over volume. We are looking for clear, well-structured, well-edited responses. Long does not mean strong.

How Your Application Will Be Reviewed

Fordham sponsorship applications are reviewed by a team of internal and external reviewers under the direction of a team leader who organizes and guides the process. Review teams are composed of individuals with experience and expertise in a variety of fields, including curriculum and instruction, special student populations, law, governance, management, leadership, finance, school start-up, and policy.

After a review of the written application and submitted documents, applicants whose responses meet the standard — as defined in the rating characteristics below — are invited to an evaluation-team interview. Following the interview, the team leader prepares a formal review summary and submits it, along with the team's

recommendation, to Fordham's senior sponsorship staff for consideration by the Fordham board's Ohio Committee and ultimately by the full Fordham board.

Within each section of this application, evaluators apply the rating characteristics to score each response. Specific criteria defining what constitutes a strong response in each section are made available in the evaluation rubric, which is published on Fordham's website.

Rating Characteristics

Evaluators use the following four ratings to assess each response:

Rating	Description
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 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.

Application Timeline

The timeline below applies to new school applicants and replicators seeking to open a school in the 2027–2028 school year. Applicants who do not yet have a relationship with Fordham must first complete the website interest form and clear the preliminary screening and pre-application interview before being given access to the online application.

Milestone	Date
School Plan Overview	March 15, 2026
School Plan Feedback	March 30, 2026
Notification to Applicant of Approval to Apply	May 1, 2026
Online application available in Epicenter management system	June 1, 2026

Milestone	Date
Deadline to submit application	July 25, 2026
Review Period	July 26, 2026 - Aug 17, 2026
Evaluation Team Reviews Completed	August 17, 2026
Evaluation-team interviews conducted	Completed by August 28, 2026
Recommendations Finalized	September 8, 2026
Ohio Committee Meeting	October 23, 2026
Fordham Board Decision	October 29, 2026
Preliminary agreement	Completed by November, based on 9 months prior to the first day of school
Contracts drafted and sent to school leaders, contact persons, and governing authorities for feedback	Drafted by February 14, 2027
New school contracts must be submitted to the Ohio Department of Education and Workforce by this date for the school to open the subsequent fall	May 15, 2027

Cover Sheet

Name of proposed community school:

Name of non-profit corporation (school board):

Chairperson of the non-profit board:

Counsel of the non-profit board:

Mailing address:

Indicate the community type (new school or existing school changing sponsors):

Indicate the community model (e.g., special needs, Montessori, Early College, career preparation, etc.):

Summarize the curriculum to be used:

Name of contact person designated by non-profit board:

Title/relationship to board:

Mailing address:

Telephone:

Email:

Education Management Organization information

Name of education management organization (if any):

Management company contact name:

Management company contact telephone:

Management company contact email:

School leader name (if selected):

Is the School Leader or Treasurer employed by the management organization? Yes/No

Epicenter (Web Based Application) access and roles

Name	Email	Organization Role

Projected Enrollment

Grade	Year 1	Year 2	Year 3	Year 4	Year 5
K					
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
Total					

Facility

School address:

If you have not yet selected a facility please describe plans to do so:

Disclosures

Will you be opening your school in the Cleveland Metropolitan School District? Yes/No

Do you have or have you had a relationship with other sponsors, community schools, or their affiliates? If YES, please list the school(s) or entities and identify the basis of the relationship (e.g., contractor, employee of operator, treasurer, board member, etc.) Yes/No

Sponsor, Charter School or Affiliate	Relationship

Has any member of the governing authority or development team, including a management company or treasurer/fiscal officer, been involved with an entity that was involved in a bankruptcy, closed for financial reasons, had a finding for recovery, or designated as un-auditable? If YES, please list the school(s) or entities and identify the basis of the relationship (e.g., contractor, employee of operator, treasurer, board member, etc.). Yes/No

School or Entity	Relationship

I certify that all information contained herein is complete and accurate. I understand that any misrepresentation could result in disqualification from the application process or termination of the sponsorship contract, if executed.

I understand that incomplete applications and those submitted after the published deadline will not be considered. The person named as the contact person designated by the non-profit board is authorized to serve as the primary contact for this application on behalf of the non-profit board.

I have read, understood, and comply with the above statement.

Name and title

Date

SECTION 1

School Identity and Demand

This section asks you to articulate what your school will be–what you are building and what community intend to serve. It is the foundation on which the rest of your application rests. Strong responses here are personal, specific, and grounded in evidence — not boilerplate.

1.1 Mission and Vision

QUESTION 1.1.

Articulate the school's mission, vision, identity, and commitments.

This question has four parts. Address each in turn.

(1) Mission and Vision Statements. Provide the school's formal mission statement in 1–2 sentences — the statement that will anchor the school's identity in its public materials and its contract with Fordham. If your school also has a formal vision statement, provide it (1–2 sentences).

(2) Founder Statement. In 250–400 words, describe why this school, why now, and why you. Reviewers should come away understanding what you have seen, experienced, or learned — and what you intend for the students and community the school will serve. If this is an expansion or replication of an established network, address the basis and rationale for the decision to grow.

A strong Founder Vision Statement is grounded in personal and professional insight. It states clearly what the school is trying to accomplish that is not already being accomplished, and for whom. It avoids generic language ("every child deserves a great education" is a truism, not a vision) in favor of specific observations, commitments, and images.

(3) School Identity Narrative. In 300–500 words, describe the experience of being in your school once it is operating well and the ending vision for a student who completes their schooling with you.

A strong School Identity Narrative is a portrait painted in prose, not a feature list. It is aspirational but grounded in something real. It describes experience, not programming: It avoids jargon — a parent who has never heard of Tier 1 instruction should be able to understand exactly what you are promising.

(4) Core Commitments. Identify 3–5 non-negotiable commitments that will shape how this school operates. For each, state the commitment in a single sentence and explain in 2–4 sentences why it is non-negotiable for you — what you have seen when it is absent, or what you have seen when it is honored.

The test is whether you would walk away from a partnership, a donor, or a personnel decision to protect this. If you would compromise to keep any of those things, it is not a non-negotiable. Strong commitments are specific and testable. "High expectations" is not a non-negotiable; "students will not be placed in low-rigor coursework based on prior school performance or zip code" is. Commitments should cover values,

systems, or instructional principles — not culture slogans. Limit yourself to 3–5. If everything is a non-negotiable, nothing is.

1.2 Market Research and Student Population

QUESTION 1.2.1

Provide market research and evidence of community support for the proposed school.

Strong applications make a clear, evidence-based case that the proposed school is needed in the target community, that there is sufficient demand to support the projected enrollment, and that established voices in the community support the work. Address each of the following.

(1) Academic need. Identify the schools currently available to students in the target catchment area, including district schools, community schools, and private schools serving similar populations. Describe the academic outcomes those schools are producing — using state report card data, growth metrics, or other comparable evidence — and identify the specific academic gap your school is designed to address.

(2) Catchment area, demographic case, and community context. Identify the proposed catchment area (the neighborhoods or zip codes from which the school expects to enroll the majority of its students). Then make the demographic and market case for the school by addressing the school-age population in the catchment, educational attainment levels, child poverty rates, existing district and community school presence and performance, and the degree of market saturation. Conclude with relevant community context — population trends, real estate conditions, transportation availability, and any other factors that affect the viability of the proposed school in the proposed location.

(3) Mission–community fit. Describe how the school's mission, vision, and design respond specifically to the academic needs and lived experiences of the students it will serve.

(4) Community support. Provide letters of support from key community members and organizations — including community leaders, neighborhood associations, faith leaders, social service organizations, and comparable schools or programs — describing their support for the proposed school and the basis for it.

REQUIRED ATTACHMENT: Market research data referenced in your response, including demographic data sources, school performance data, and any community-level analysis your team has produced.

REQUIRED ATTACHMENT: Letters of support from community members and organizations.

SECTION 2

Education Plan

The Educational Plan is the core of the application. Fordham's Instructional Excellence Framework (IEF) defines what teaching and learning are expected to look like in a Fordham-sponsored school. It is the standard against which this section will be evaluated, and applicants should read the full IEF before responding to the questions below. Schools are not expected to be identical. But schools are expected to be aligned to the practices the IEF describes as the operational expression of how learning works.

2.1 Instructional Plan

2.1.A Instructional Vision and Observable Practice

The IEF describes instructional excellence as grounded in the cognitive science of learning and organized around the Simple Model of Teaching. A school's instructional vision is the through-line that connects these elements into a coherent whole — a clear, defensible account of what teaching and learning look like in this school and why. The questions below ask applicants to articulate that vision and to identify the way they will operationalize it in daily practice.

QUESTION 2.1.A.1

Describe your school's instructional vision and the model through which it will be operationalized.

(1) Vision. State, in 150–300 words, the instructional vision that will guide teaching and learning in your school. The vision should make clear what you believe about how students learn and what classrooms must do to produce that learning. The vision should be specific enough to distinguish your school from a generic claim about rigor or student-centeredness.

(2) Observable practice. Describe what a typical lesson looks like in your school. A reviewer should come away able to picture what a visitor would see and hear when entering a classroom. Address key lesson components, the role of the teacher across the arc of a lesson, what students are doing throughout, and the specific instructional techniques that distinguish your model in practice.

> REQUIRED ATTACHMENT: Instructional artifacts. Provide any artifacts that articulate your school's instructional systems beyond what is described in the responses below. Examples include but are not limited to: an instructional vision document and/or instructional playbook. Provide the actual artifacts your school uses (or will use).

2.1.B Curriculum and Implementation

Curriculum is treated in the IEF as the foundation of instructional excellence — not one input among many, but the structure through which every other element operates. The cognitive science is direct: students cannot think critically about content they do not yet know, and the knowledge that makes complex thinking possible is built systematically across grades through curriculum that is knowledge-rich, sequenced for cumulative knowledge-building, grade-level rigorous, and externally validated as high-quality.

Fordham expects sponsored schools to use curriculum that meets the High-Quality Instructional Materials (HQIM) standard. In ELA, this includes alignment with the science of reading as required by Ohio law. Where the Ohio Department of Education and Workforce (ODEW) publishes approved curriculum lists or HQIM rubrics, Fordham expects sponsored schools to select from validated options where they exist or to provide a substantial evidentiary basis where they do not.

The questions below ask applicants to describe the curriculum they will use, how teachers will be prepared to deliver it well, and how the school will know it is being implemented with fidelity and skill.

QUESTION 2.1.B.1

Identify the specific curriculum or curricula your school will use for each subject and grade band — including ELA, mathematics, science, civics, history, and any other subjects taught — and explain the basis for your selections.

(1) Named selections by subject and grade band. Provide a complete list of adopted curricula by subject and grade band. For each, identify the publisher, edition, and copyright year. Indicate whether the curriculum is full-year core, supplemental, or used for a specific instructional purpose.

(2) Evidence of quality. Describe the basis for each selection. Fordham expects sponsored schools to use materials that meet the HQIM standard. For subjects with established third-party reviews — such as ELA, mathematics, and foundational literacy, where EdReports, What Works Clearinghouse, or ODEW publishes ratings — provide the rating. Fordham expects sponsored schools to use materials rated Meets Expectations by at least one of these sources. For subjects without established third-party reviews — often science, history, civics, and other content areas — provide a substantive case for the curriculum's coherence, knowledge-richness, sequencing, and alignment to standards. Reviewers will look for evidence of careful selection, not a brand name without a rationale.

(3) Science of reading alignment. In compliance with Ohio law, all ELA instructional materials must align with the science of reading. Confirm alignment and describe the specific features of the selected materials that reflect it — for example, systematic

phonics, decodable texts at the appropriate stage, and knowledge-building content in upper grades.

(4) Knowledge-building across subjects. Describe how the curricula you have selected, taken together, build broad and coherent background knowledge across grades. In particular, address how science, history, civics, and other content-area subjects contribute to the knowledge base students will need to engage with complex texts and grade-level content in later grades.

(5) Co-curricular design. Describe your selection choices for curricula and development in the areas of citizenship, sportsmanship, self-governance, and social-emotional learning to provide a well-rounded education for success beyond school.

QUESTION 2.1.B.2

Describe how teachers in your school will be prepared to implement the adopted curriculum with fidelity and skill.

(1) Lesson and unit internalization. Describe how teachers will internalize curriculum materials and prepare to teach them. Name the protocol your school will use, the time allocated, the materials reviewed, and the artifact produced. Indicate who leads internalization, how often it occurs, and what strong preparation produces.

(2) Faithful implementation. Describe what faithful implementation means in your school — which elements of the curriculum are expected to be delivered as written, and where teacher adaptation is expected or permitted. Be specific about the boundary.

(3) Monitoring implementation quality. Describe how the school will monitor whether the curriculum is being taught as intended across classrooms. What will instructional leaders look for during observations? What artifacts will they review? How frequently? What constitutes evidence of strong implementation, and what constitutes a signal that intervention is needed?

(4) Responding to weak implementation. Describe what the school will do when monitoring reveals that implementation is not meeting the standard — for an individual teacher, for a grade-level team, or across the school. What is the response protocol? Who is responsible for executing it? What is the expected timeline for improvement?

(5) Teachers of students with disabilities. For teachers who work with students with disabilities — including general education teachers in co-teaching or inclusion settings, not only intervention specialists — describe how they will be prepared to implement the curriculum in ways that maintain grade-level rigor while meeting individual student needs. Confirm whether all teachers who work with students with disabilities have received science of reading training. If not, when will they?

REQUIRED ATTACHMENT: Complete list of all curriculum for ELA, math, history, civics, and science for every grade level, including supplemental materials, along with EdReports or What Works Clearinghouse ratings.

REQUIRED ATTACHMENT: Sample lessons from two different grade levels illustrating implementation of the curriculum consistent with the school's instructional model.

2.1.C Classroom Practice

Classroom practice is where the cognitive science the IEF describes becomes visible. The questions below ask applicants to describe how their school produces these practices consistently across classrooms.

QUESTION 2.1.C.1

Describe how teachers deliver instruction and how they ensure students are doing the cognitive work of the lesson.

(1) Delivery of new content. How do teachers deliver new content?

(2) Engineered participation. How do teachers structure student participation so that every student is accountable for thinking and responding — not only the students who raise their hands? Describe the specific techniques your school uses.

(3) Scaffolded support. How do teachers respond when students say they do not know the answer, or when students struggle with a task? How do teachers press students to clarify, revise, and deepen their thinking — or the thinking of others?

(4) Whole-class checking for understanding. How do teachers check the whole classroom's understanding of the content during the lesson — and how do they recognize and adjust when a lesson is not landing?

QUESTION 2.1.C.2

Describe how the school will know that the instructional practices above are happening consistently across classrooms — and what the school will do when they are not.

(1) Monitoring and calibration. Describe the school's system for monitoring instructional practice. What do instructional leaders observe for? How frequently are classrooms visited, and what data is captured? Describe how the school ensures that the adults conducting observations are seeing the same things the same way — name the calibration protocol and its cadence.

(2) Response. Describe what the school will do when monitoring reveals that practice is not meeting the standard — for an individual teacher, for a grade-level team, or across the school. What is the response protocol, who executes it, and what is the expected timeline for improvement?

REQUIRED ATTACHMENT: The school's classroom observation tool and any rubrics or look-fors used during observations.

2.1.D Data Systems and Promotion Decisions

The IEF treats data not as a system of measurement but as the engine of instructional response. The questions below ask applicants to describe their school's data systems as instructional engines, not just measurement infrastructure.

QUESTION 2.1.D.1

Describe your school's comprehensive assessment and data system across four levels, and how data drives instructional decision-making.

(1) Lesson level. How will teachers regularly gather evidence of student learning within and across lessons? Describe your school's approach to formative assessment tools such as exit tickets — how they will be designed, how consistently they will be used, and how the data they generate will inform instructional planning.

(2) Unit and interim level. What assessments will you use to track progress across a unit or marking period? How will teachers and leaders analyze this data together, and what instructional decisions should result?

(3) School level. What summative and benchmark assessments will you use to evaluate school-wide academic progress? How will results be disaggregated and used to make instructional decisions at the school level?

(4) Individual level. Address how the school track individual student achievement, progress, and other key data points – and communicate them to all stakeholders, including families.

QUESTION 2.1.D.2

Describe how data drives instructional response in your school — not just what data the school collects, but what the school does when the data reveals that students have not yet learned what was taught or is ready for extended learning opportunities.

(1) The data-to-reteach cycle. Describe the protocol by which teachers and instructional leaders study student work, diagnose the specific misconception or skill gap, design a targeted reteach, execute the reteach, and check whether the reteach landed. Name the protocol, the meeting cadence, and the artifact produced. Identify who participates and what their roles are. Address how teachers are prepared to adjust instruction in real time when in-lesson checks reveal widespread misunderstanding.

(2) Response and Individualization. Describe the way in which the school responds to the individual student's achievement and progress. In what ways does the school provide remediation or acceleration based on individual student performance.

QUESTION 2.1.D.3

Describe your school's approach to promotion and retention decisions. Explain how academic performance, assessment results, attendance, growth, and other indicators will be used to determine readiness for promotion. Describe how these decisions will be communicated to families, including timelines, opportunities for parent input, and any appeals process.

> REQUIRED ATTACHMENT: The school's data meeting protocol, including cadence, participants, artifacts reviewed, and outputs produced.
>
> REQUIRED ATTACHMENT: A sample data analysis cycle showing how student work or assessment data is reviewed, analyzed, and converted into instructional response.

2.1.E Professional Learning and Instructional Leadership

The IEF treats teaching as a craft that is built — not assumed — and treats intellectual preparation as the most consequential work a teacher does. The questions below ask applicants to describe how their school will produce teachers capable of the practices the IEF requires — including teachers who possess deep subject-matter knowledge in the disciplines they teach.

QUESTION 2.1.E.1

Describe your school's professional learning architecture.

(1) Intellectual preparation time. How is teacher intellectual preparation — the work of internalizing curriculum, anticipating misconceptions, scripting key explanations — protected on the school calendar? When does it happen, with whom, and what is the artifact produced?

(2) Observation and coaching cadence. How frequently will instructional leaders observe each teacher? What does a coaching conversation look like in your school — specifically, how will action steps be identified, practiced, and followed up on?

(3) Whole-group professional development. How will you determine the topics for whole-group PD sessions? What evidence will drive topic selection? How will you evaluate whether PD is producing changes in classroom practice, not just changes in teacher knowledge or satisfaction?

(4) Professional learning for staff working with students with disabilities. What professional learning will intervention specialists and special education staff receive — including content-area expertise, IEP implementation, co-teaching models, and evidence-based intervention strategies? What professional learning will general education teachers receive to support their work with students with disabilities in the core classroom — including co-teaching models, differentiated scaffolding within grade-level content, and IEP goal awareness?

QUESTION 2.1.E.2

Describe how your school will recruit, develop, and retain teachers with deep subject-matter knowledge in the disciplines they teach.

(1) Recruitment. Describe how subject-matter preparation factors into hiring. What does the school look for in candidates — academic background, depth of disciplinary study, content assessments, demonstration lessons? How does the school evaluate whether a candidate has the content knowledge to teach the assigned grade and subject well, beyond meeting state licensure requirements?

(2) Ongoing content development. Once on staff, how will teachers continue to deepen their subject-matter knowledge? Describe any structured content study, summer institutes, curriculum-embedded content learning, or partnerships that build teacher knowledge in the disciplines they teach. Address content development for all subjects taught — not only ELA and mathematics.

(3) Identifying and responding to content gaps. What will the school do when a teacher is identified as having gaps in the subject-matter knowledge required to teach the assigned content at the expected depth? Describe the response protocol, the supports available, and the conditions under which the school would reassign or replace the teacher.

QUESTION 2.1.E.3

Describe the makeup of your school's instructional leadership team. Who will be responsible for observing teachers, delivering instructional feedback, and facilitating lesson preparation and data meetings? What proportion of their time will be dedicated to instructional leadership versus other administrative responsibilities, and how will that time be protected?

> REQUIRED ATTACHMENT: A schedule for professional development showing the structure, frequency, and focus of professional learning across the school year.
>
> REQUIRED ATTACHMENT: The school's observation and coaching protocol, including cadence, feedback structure, action-step format, and follow-up mechanism.

2.1.F Tiered Support and Intervention

The system through which students who need additional support are identified, served, scheduled, and monitored is described here. Population-specific compliance and instructional considerations for students with disabilities, English learners, and gifted students are addressed in Section 2.3.

QUESTION 2.1.F.1

Describe your school's multi-tiered system of supports — how the school identifies students who need additional support, what additional support those students receive, and how the system operates as an integrated whole. This question covers all students

who need additional support beyond Tier 1, including students receiving academic intervention, students with disabilities, English learners, and gifted students.

(1) Identification. How does the school identify students who need additional support? Describe the data sources, screening cadence, and decision-making processes that determine which students enter Tier 2 or Tier 3 support — and how the school distinguishes between students whose needs can be met through academic intervention and students who require evaluation for special education, English learner services, or gifted programming.

(2) Structure of support. What does additional support look like at each tier? Describe group size, frequency, duration, who delivers the instruction, and how structure varies across student populations (academic intervention, students with disabilities, English learners, gifted).

(3) Schedule and integration with core instruction. How is additional support scheduled to be additive to — not substitutive for — core instruction across all populations? Describe specifically how the master schedule protects core instructional time for students receiving pull-out services, push-in services, intervention blocks, and gifted extension.

(4) Materials and instructional approach. What materials and instructional approaches are used at each tier? If your school serves early-elementary students, describe specifically how foundational reading skills are taught — including whether small reading groups are used, how they are structured, and what guides the instruction. Describe how grade-level rigor is maintained across populations receiving additional support.

(5) Progress monitoring and tier movement. How is progress monitored across populations? What data is reviewed, how often, and by whom? What triggers a change in tier, in approach, or in referral for further evaluation?

2.2 Calendar, Schedule, and Structure

QUESTION 2.2.1

Describe the school's annual calendar and daily schedule.

(1) Provide the proposed school calendar (number of instructional days, school year start and end dates, and major breaks) and rationale.

(2) Provide a sample daily and weekly schedule for at least one grade level, showing minutes allocated to each subject and to non-instructional activities.

(3) Describe how the calendar and schedule support the instructional model — including any extended day, extended year, or unusual structural choices and the reasons for them.

> REQUIRED ATTACHMENT: Proposed school calendar and sample daily/weekly schedule for the lowest and highest grades the school will serve in Year 1.

2.3 Special Populations

This subsection addresses the population-specific compliance, identification, and instructional considerations for students with disabilities, English learners, and gifted students. The system through which these students are identified, scheduled, served, and monitored is described in Section 2.1.F.

QUESTION 2.3.1

Describe how the school will fulfill its obligations to students with disabilities under IDEA and Section 504.

(1) Child Find and initial evaluation. Describe the school's Child Find procedures, including how students who may need evaluation are referred and how initial evaluations are conducted within required timelines.

(2) IEP development and implementation. Describe the school's process for IEP development, the school's approach to ensuring IEP goals are taught and progress-monitored within general education and intervention settings, and how IEP teams are convened and managed.

(3) FAPE and Least Restrictive Environment. Describe the school's commitment to providing FAPE in the LRE, including the school's stance on inclusion, the criteria used to determine the appropriate continuum of placement, and the school's plan for students whose needs may exceed the school's capacity to serve them in-house.

(4) Related services. Describe how the school will provide related services (speech/language, occupational therapy, counseling, etc.) — including whether services will be delivered by school staff or through contracts, and how service delivery will be coordinated.

(5) Section 504. Describe the school's process for identifying and serving students with 504 plans.

> REQUIRED ATTACHMENT: Draft Special Education Procedures Manual, or detailed outline of policies the school will implement.

QUESTION 2.3.2

Describe how the school will fulfill its obligations to English learners under Title VI and Title III.

(1) Identification and language proficiency assessment. Describe the school's process for identifying English learners at enrollment, the language proficiency assessments the school will administer (including OELPS and OELPA), and how the school will ensure timely assessment.

(2) Service eligibility and exit criteria. Describe the criteria the school will use to determine whether identified English learners require services, and the criteria for exiting students from English learner services.

(3) Title III compliance and family communication. Describe the school's Title III compliance plan, including required parent notifications, language access for families

with limited English proficiency, and the school's approach to communicating with families in their home languages.

QUESTION 2.3.3

Describe how the school will identify and serve gifted students under Ohio's gifted education law.

(1) Identification. Describe the school's process for identifying gifted students, including how the school will use Ohio's identification methods (assessment, screening, or referral) and the timeline for identification.

(2) Service plans and programming. Describe the Written Education Plans (WEPs) that will be developed for identified gifted students, the programming or services those students will receive, and how the school will ensure that gifted programming maintains rigor without becoming separate from the school's core instructional approach.

(3) Reporting. Describe the school's plan for reporting gifted identification and service data to ODEW and to families.

2.4 School Climate and Student Supports

This subsection asks you to describe the conditions for learning at both the classroom level and the school-wide level — the culture teachers create inside their classrooms, the systems and policies that govern student behavior across the school, the school's approach to attendance, and the social, emotional, and wellness supports students will receive.

> REQUIRED ATTACHMENT: Student culture and climate artifacts. Provide any artifacts that articulate your school's student culture and climate systems beyond what is described in the responses below. Examples include but are not limited to: a student culture vision document, a student culture playbook or staff handbook, a behavior management system or matrix, the student and family handbook including discipline policies, escalation protocols and behavior support documentation (e.g., behavior support plans, threat assessment protocols, restorative practices guides), the school's attendance policy and tiered attendance intervention protocol, and any social-emotional learning curriculum or framework documents. Provide the actual artifacts your school uses (or will use), not summaries. If your school has not yet developed a particular artifact, indicate which artifacts are in development and the timeline for completion.

QUESTION 2.4.1

Describe how teachers establish and maintain the conditions for learning in their classrooms.

(1) What does a well-managed classroom look and feel like in your school? How are routines, transitions, and behavioral expectations established, explicitly taught, and maintained?

(2) How does your school approach the relationship between high academic expectations and support for students? Describe the stance your teachers take when students are struggling or not meeting expectations.

(3) How does your school ensure that classroom expectations are consistent across all classrooms and all adults — not just in individual teachers' rooms?

QUESTION 2.4.2

Describe the school's school-wide approach to student behavior and discipline.

(1) Describe the school's expectations for student behavior, the systems that will support those expectations, and the consequences for students who do not meet them.

(2) Describe the school's approach to discipline — including any progressive discipline structures, restorative practices, and the school's stance on suspension and expulsion.

(3) Describe how the school will maintain high expectations for behavior while ensuring discipline is applied equitably across racial, gender, and disability lines.

> REQUIRED ATTACHMENT: Draft Student and Family Handbook, including discipline policy and procedures.

QUESTION 2.4.3

Describe the school's approach to student attendance.

(1) Describe the school's daily attendance procedures, including how the school will respond to absences in real time.

(2) Describe the school's strategy for chronic absenteeism — including the data the school will track, the threshold for intervention, and the practices the school will use to address absenteeism as an instructional and equity issue.

(3) Describe the school's annual attendance goal and the rationale for it.

QUESTION 2.4.4

Describe the social, emotional, and wellness supports the school will provide.

Describe the school's approach to student wellbeing — including counseling, social-emotional learning, mental health supports, and any partnerships with external providers. Describe the staffing model for these supports.

2.5 Performance Goals

QUESTION 2.5.1

Identify the performance goals the school will commit to.

(1) Identify the school's academic performance goals — including state assessment performance, growth, and any nationally-normed assessment goals — for each year of the proposed contract term. Goals should be specific, measurable, and ambitious.

(2) Identify the school's non-academic performance goals — including attendance, retention, and any mission-specific goals — for each year of the proposed contract term.

(3) For each goal, identify the assessment or data source, the measurement methodology, and the target.

QUESTION 2.5.2

Describe how the school will hold itself accountable to these goals.

Describe the data review structures, board reporting cadence, and corrective action plans the school will use to monitor progress toward goals — and the school's commitment to be transparent about progress with families, with Fordham, and with the public.

SECTION 3

Leadership and Founding Team Capacity

Schools are built by people. The single most predictive factor in whether a new school succeeds is the capacity of the team that opens it. This section asks you to demonstrate that the founding team has the experience, the time, and the leadership depth required to launch and sustain a high-performing school. Replication applicants must additionally demonstrate the capacity to bring an existing model to a new context.

3.1 Prior Success in Raising Student Achievement

QUESTION 3.1.1

If this is your first school, describe evidence of prior success producing strong academic outcomes for students, particularly students from low-income families and underserved communities. ***If this is an expansion or replication effort, skip this question.***

(1) Proposed school leader's track record. If a school leader has been identified, describe the schools or settings in which they have previously led or held significant instructional leadership roles, the student outcomes those settings produced, and the leader's specific contribution to those outcomes.

(2) Founding team's collective track record. Describe the prior settings in which founding team members have produced strong student outcomes, with reference to verifiable data sources (state report cards, growth metrics, or comparable accountability data). Identify each team member's specific contribution.

> REQUIRED ATTACHMENT: Verifiable academic outcome data for any school or setting cited as evidence of prior success.

3.2 Founding Team Capacity, Roles, and Time Commitment

QUESTION 3.2.1

Identify the founding team and describe each member's role in opening the school.

(1) Identify each member of the founding team — including the proposed school leader (if identified), founding board members, key founding staff, and any external advisors playing a substantive role.

(2) For each member, describe their specific responsibilities during the planning year and through the first year of operation.

> REQUIRED ATTACHMENT: Founding team member resumes and signed time commitment statements.

3.3 Leadership Recruitment and Succession Planning

QUESTION 3.3.1

Describe how the school will recruit, develop, and sustain leadership over time.

(1) Describe the recruitment and onboarding plan for the founding school leader (if not yet identified) and other leadership positions.

(2) Where the proposed school leader has been identified but does not yet have a track record of leading a school, describe the leadership preparation, mentorship, and support structures that will compensate for that gap — and how the founding board has assessed leader readiness.

(3) Describe the school's succession plan in the event of unexpected leadership transition — including the depth of internal leadership capacity and the steps the board will take to maintain continuity.

(4) Describe the school's long-term leadership pipeline — how the school will develop the next generation of leaders from within.

3.4 Replication Capacity

This subsection applies to applicants seeking to replicate an existing school or network. Replication takes three configurations: (1) an out-of-state network entering Ohio, (2) an in-state network replicating within the same market it currently operates in, or (3) an in-state network replicating into a new Ohio market. All three configurations require the same evidence: the network's track record, the support structures the network will provide, the fidelity systems that ensure model integrity, and the adaptation strategy for the proposed school's context. New-start applicants may skip to Section 4.

QUESTION 3.4.1

Describe the replication network's capacity to deliver on the proposed school.

The legal, operational, and governance relationship between the proposed school and the replicating organization is addressed in Section 4.6. This question focuses on the network's capacity to support the proposed school's success.

(1) Network track record. Describe the academic and operational track record of existing schools in the network. Provide verifiable accountability data — state report cards or comparable evidence — for the most recent three years for each school in the network. Where the network operates outside Ohio, identify the comparable accountability framework used in those states and how its outcomes map to Ohio expectations.

(2) Proposed school leader's track record. If a school leader has been identified, describe the schools or settings in which they have previously led or held significant instructional leadership roles, the student outcomes those settings produced, and the leader's specific contribution to those outcomes.

(3) Support structures. Describe the support the replicating organization will provide to the proposed school during start-up and ongoing operation, including instructional support, leadership coaching, professional learning, operational support, talent

recruitment, and financial support. Distinguish what the network will provide directly from what the proposed school will build for itself.

(4) Fidelity systems. Describe how the replicating organization ensures fidelity to the model across schools — including the practices, systems, and outcomes that define the model and how the proposed school's adherence to them will be monitored.

(5) Adaptation to local context. Describe how the model will be adapted, if at all, to fit the proposed school's catchment, student population, and market context. Where adaptation is required, describe what is being adapted and why; where adaptation is not required, explain why the model translates without modification.

REQUIRED ATTACHMENT: State report cards or comparable accountability data for all existing schools in the network for the most recent three years.

REQUIRED ATTACHMENT: Documentation of the replication relationship — management agreement, services agreement, or memorandum of understanding governing the relationship between the proposed school and the replicating organization.

SECTION 4

Governance

A community school is a public institution. The board that governs it holds the school in public trust. Fordham looks for boards that exercise genuine oversight, that bring the right expertise to that work, and that maintain meaningful independence from the school's leadership and from any management organization the school contracts with. This section is one of the strongest signals to Fordham about whether the proposed school will be governed well.

4.1 Governing Body Structure and Authority

QUESTION 4.1.1

Describe the governing body's structure, authority, and committee architecture.

(1) Describe the legal structure of the governing body, the size and composition of the board, and the term lengths and term limits.

(2) Describe the committee structure of the board — including standing committees, the responsibilities of each, and the frequency of committee meetings.

(3) Describe the meeting cadence of the full board and the school's plan for compliance with Ohio public meeting requirements.

> REQUIRED ATTACHMENT: Draft bylaws of the governing body.
>
> REQUIRED ATTACHMENT: Draft policies governing board composition, committee structure, and meeting procedures.

4.2 Board Composition and Capacity

QUESTION 4.2.1

Identify the founding governing body and describe the capacity each member brings.

(1) Identify all members of the founding governing body, providing name, role on the board, professional background, and the specific expertise each member brings (e.g., finance, education, legal, real estate, fundraising, community).

(2) Identify any relationships among board members or between board members and the school's leadership or management organization (if applicable).

(3) Identify any gaps in board expertise or community representation that the school has acknowledged, and how those gaps will be closed.

> REQUIRED ATTACHMENT: Founding board member resumes and signed conflict of interest disclosures.

QUESTION 4.2.2

Describe how new board members will be recruited, selected, and onboarded.

Describe the board's recruitment plan, including the criteria for new members, the recruitment process, and the orientation and onboarding the board will provide to new members.

4.3 Board Training and Self-Assessment

QUESTION 4.3.1

Describe how the board will continue to develop its capacity to govern.

(1) Describe the annual training the board will commit to — including any required training under Ohio law, additional governance training the board will participate in, and the schedule for that training.

(2) Describe the board's practice for self-assessment — how the board evaluates its own performance, how often, and against what standard.

(3) Describe how the board will evaluate the school leader — including the criteria, the cadence, and the connection between leader evaluation and the school's performance goals.

4.4 Conflict of Interest and Ethics

QUESTION 4.4.1

Describe the board's conflict of interest policy and ethics practices.

(1) Describe the board's conflict of interest policy — how conflicts are disclosed, how they are managed, and how the board ensures that conflicted members do not influence decisions in which they have a financial or personal interest.

(2) Identify any current or anticipated conflicts of interest among founding board members — including any familial, financial, or professional relationships among board members, between board members and school leadership, or between board members and any management organization or contracted services provider.

(3) Describe the board's code of ethics and any additional policies governing board member conduct.

> **REQUIRED ATTACHMENT:** Draft conflict of interest policy and code of ethics.

4.5 Decision-Making Authority and the Board–CMO Relationship

Among the most important questions Fordham asks is who decides what. In every community school, decision-making authority is distributed across the school leader, the local governing body, and — where present — a community management organization (CMO) or other management entity. The clarity of that decision-making structure is one of the strongest predictors of governance health. Confusion about who has authority over what is one of the most common sources of governance failure.

This subsection applies to every applicant. Applicants whose proposed school will be operated, managed, or supported by a CMO, education service provider (ESP), or other management organization — including replications of existing networks — must complete the additional questions in 4.5.2 and 4.5.3.

QUESTION 4.5.1

Describe the decision-making matrix for the proposed school.

(1) Articulate the decision-making authority across the school leader/director, the local governing board, and (if applicable) the CMO or management organization. For each major category of decision, identify which entity has authority and what the role of the other entities is (consult, recommend, approve, ratify, etc.).

(2) Major decision categories must include, at minimum: hiring and firing the school leader; staff hiring and termination; curriculum adoption and instructional model decisions; budget approval and significant budget amendments; facilities decisions including leases and capital expenditures; contract approvals above defined thresholds; and changes to the school's mission, model, or program.

(3) Describe the decision-making processes the board will use — including the categories of decisions that require full-board approval, those that may be delegated to committees or to the school leader, and those that require supermajority votes.

> **REQUIRED ATTACHMENT:** Decision-making matrix in tabular form, listing each major decision category and the role of each entity (school leader, board, CMO/management organization).

QUESTION 4.5.2 (CMO/Management Organization Applicants Only)

Describe the relationship between the local board and the management organization.

(1) Identify the management organization, its legal structure, and its governance. Replication applicants should describe the network's track record in Section 3.4; this question focuses on the legal and governance structure of the management entity itself.

(2) Describe the scope of services the management organization will provide to the school — including instructional, operational, financial, human resources, and any other services.

(3) Describe the fee structure of the management agreement — including the fee amount, the basis on which the fee is calculated (per-pupil, percentage of revenue, fixed amount), what the fee covers, and what services are charged separately.

(4) Describe the term of the management agreement and the conditions under which the agreement can be amended or terminated by either party. Specifically describe the local board's authority to terminate the agreement, the grounds for termination, the notice required, and the process for transition if the agreement is terminated.

(5) Describe the local board's independence from the management organization and how it will exercise oversight — including how board members are recruited and removed, the proportion of board members nominated by or affiliated with the management organization, how the board will receive financial and academic information independent of the management organization, how the board will evaluate the management organization's performance, and how the board will respond if performance does not meet expectations.

REQUIRED ATTACHMENT: Draft management agreement, services agreement, or term sheet — whichever document will govern the relationship between the school and the management organization.

QUESTION 4.5.3 (CMO/Management Organization Applicants Only)

Describe any financial dependencies between the school and the management organization.

(1) Identify any financial advances, loans, lines of credit, working capital, or other financial support that the management organization will provide to the school — either during start-up or on an ongoing basis — and describe how those financial relationships affect the local board's independence and its capacity to terminate the management agreement if performance does not meet expectations.

(2) Cross-reference any management organization financial support that addresses the start-up or operational cash flow gap to the corresponding entry in Section 6.3.

SECTION 5

Operations and Staffing

This section describes how the school will be staffed, how staff will be evaluated, how students will be recruited and enrolled, and how the school's organizational structure will support its mission and instructional model.

5.1 Organizational Structure and Management

QUESTION 5.1.1

Describe the school's organizational structure.

(1) Provide organizational charts for Year 1 and for the school at full enrollment, identifying every position by title.

(2) Describe how the organizational structure supports the instructional model described in Section 2.1 — including any non-traditional roles (deans of instruction, content directors, intervention coordinators) and the rationale for them.

> REQUIRED ATTACHMENT: Organizational charts for Year 1 and for the school at full enrollment.

5.2 Staffing Plan and Recruitment

QUESTION 5.2.1

Describe the staffing plan for the school.

(1) Provide a year-by-year staffing plan from Year 1 through full enrollment, including all instructional, leadership, operational, and support positions.

(2) Identify the qualifications required for each instructional role, including any certifications, licenses, or experience requirements.

(3) Describe the school's teacher recruitment plan — including the channels through which the school will recruit, the timeline, and the school's strategy for recruiting teachers who will excel in the school's instructional model.

5.3 Staff Evaluation and Performance Management

QUESTION 5.3.1

Describe how staff will be evaluated and held accountable for performance.

(1) Describe the teacher evaluation system — including the components of the evaluation, the cadence, and the connection between evaluation and the school's instructional vision.

(2) Describe the school's approach to compensation, including the salary structure and any performance-based components.

(3) Describe the school's approach to staff retention — including how the school will identify and address turnover, particularly among high-performing teachers.

5.4 Student Recruitment, Enrollment, and Retention

QUESTION 5.4.1

Describe the school's student recruitment and enrollment plan.

(1) Describe the recruitment timeline and strategy — including outreach to families, the channels the school will use, and the school's plan for recruiting families who reflect the target population described in Section 1.2.

(2) Describe the enrollment process, including the application window, lottery procedures, and waitlist management.

(3) Describe the school's plan for student retention across grade transitions and grade-level expansions.

> **REQUIRED ATTACHMENT:** Draft enrollment policy and lottery procedures.

SECTION 6

Financial Plan

Charter schools fail more often for financial reasons than for academic ones. The financial plan must be more than a budget — it must demonstrate that the founding team understands the financial realities of operating a community school in Ohio, has built a plan that works under realistic assumptions, has identified the people responsible for financial stewardship, and has planned for the cash flow realities of public school funding cycles.

6.1 Five-Year Budget and Revenue Assumptions

QUESTION 6.1.1

Provide a five-year budget for the school.

(1) Provide a complete five-year budget covering all revenue sources, all expense categories, and end-of-year fund balances for each year.

(2) Describe and justify all revenue assumptions — including per-pupil funding rates, anticipated enrollment, anticipated student demographics affecting funding (special education, English learner, economically disadvantaged), federal funding sources, and any anticipated philanthropic revenue.

(3) Describe and justify all major expense assumptions — including staff compensation and benefits, occupancy costs, instructional expenses, and any management fees.

(4) Identify the most significant risks to the budget and the school's plan for managing them.

> REQUIRED ATTACHMENT: Five-year budget in spreadsheet form, with revenue and expense detail and end-of-year fund balances.
>
> REQUIRED ATTACHMENT: Budget narrative explaining all major assumptions.

6.2 Financial Management, Internal Controls, Audit, and Treasurer

Strong financial management depends on the right people, the right structures, and the right oversight. Fordham looks for clear accountability for financial stewardship and meaningful separation of duties — not financial management concentrated in one person without checks.

QUESTION 6.2.1

Identify the Treasurer of the governing body and describe the Treasurer's qualifications.

(1) Identify, by name, the proposed Treasurer of the school's governing body. If a Treasurer has not yet been identified, describe the recruitment timeline and the qualifications the school is seeking.

(2) Describe the Treasurer's qualifications — including financial training, prior board treasurer experience, and any professional credentials in finance, accounting, or fiscal management.

(3) Describe the specific responsibilities of the Treasurer, the cadence of financial reporting from the Treasurer to the full board, and the Treasurer's role in audit oversight.

QUESTION 6.2.2

Describe the school's financial management structure and the segregation of duties.

(1) Identify, by role, who has authority over financial transactions, financial reporting, and budget management within the school. If the school will contract with an external fiscal services provider (treasurer-of-record service, accounting firm, or other), identify that provider and describe their scope of services.

(2) Describe the segregation of duties between the Treasurer (board), the school leader, the business manager or fiscal officer (school staff), and any external fiscal services provider — with clear identification of who initiates, approves, records, and reconciles transactions across purchasing, payroll, accounts payable, accounts receivable, cash receipts, and bank reconciliations.

QUESTION 6.2.3

Describe the school's internal control environment, audit practices, and financial reporting cadence.

(1) Describe the school's internal controls — including signature authority, dual-signature thresholds, expense approval procedures, and credit card or purchase card policies.

(2) Describe the school's audit plan — including the planned timing of the first audit, the auditor selection process, and the board's audit oversight responsibilities.

(3) Describe the cadence of financial reporting to the full board — including monthly financial statements, budget-to-actual variance reports, and any additional reporting tied to the board's fiscal oversight responsibilities.

> **REQUIRED ATTACHMENT:** Draft fiscal policies and procedures manual.

6.3 Cash Flow and Start-Up Capitalization

Ohio community schools face a structural cash flow challenge. School operations begin in July, but the first state foundation payment does not arrive until November. New schools must therefore have committed funding in place to cover the four-to-five-month gap between the start of operations and the start of state funding — covering staff salaries, occupancy costs, supplies, and start-up costs during the most expensive months

of the school year. This is not a hypothetical risk. Charter schools that have not adequately planned for this gap have failed before opening.

QUESTION 6.3.1

Provide a month-by-month cash flow projection for the first fiscal year.

(1) Provide a month-by-month cash flow projection covering July through June of the first fiscal year, showing all anticipated cash receipts (state foundation payments by month, federal funding, philanthropic revenue, lines of credit, advances, and any other cash sources) and all anticipated cash disbursements (payroll, occupancy, instructional expenses, and other operating costs).

(2) Identify the months in which the school will be in a deficit cash position absent bridging funding, the magnitude of the cash gap in those months, the highest single-month cash outflow during the first year, and the cumulative cash position at the end of each month.

> REQUIRED ATTACHMENT: Month-by-month cash flow projection for the first fiscal year, with all assumptions documented.

QUESTION 6.3.2

Identify the funding source(s) that will close the July–November gap and provide binding commitment evidence.

(1) Identify the funding source or sources that will cover the cash flow gap between the start of operations (July) and the receipt of state foundation payments (November). Acceptable sources include lines of credit from financial institutions, philanthropic bridge funding, advances from a CMO or management organization, or founder loans.

(2) For each funding source, describe the repayment terms, the interest or fee structure (if any), and the impact of repayment on the operating budget.

(3) If the cash flow gap is being closed by an advance from a CMO or management organization, cross-reference Section 4.5.3 and describe how this financial dependency affects board independence and the local board's authority to terminate the management agreement.

> REQUIRED ATTACHMENT: Documentation for every funding source identified — signed term sheets, grant agreements, loan agreements, or advance agreements.

6.4 Pre-Opening Plan and Timeline

QUESTION 6.4.1

Provide a pre-opening plan and timeline.

(1) Provide a month-by-month pre-opening timeline from contract execution through the first day of school, with all major milestones identified and a person responsible for each.

(2) Provide a pre-opening budget detailing all expenses and the funding sources for those expenses.

(3) Identify the key risks to the pre-opening timeline and the school's plan for managing them.

> **REQUIRED ATTACHMENT:** Pre-opening timeline and budget.

6.5 Insurance and Risk Management

QUESTION 6.5.1

Describe the school's insurance coverage and risk management plan.

Identify all insurance policies the school will carry, with coverage limits and providers. Describe the school's approach to risk management, including any risk transfer or risk mitigation strategies beyond insurance.

6.6 Contingency Planning

QUESTION 6.6.1

Describe the school's contingency plans for the most common sources of community school financial distress.

(1) Describe the school's plan if first-year enrollment falls 10 percent below projection. What expenses will be reduced, in what order, and on what timeline?

(2) Describe the school's plan if first-year enrollment falls 20 percent below projection. What changes to staffing, programming, or operations will be required to maintain financial viability?

(3) Describe the school's plan in the event of an unexpected leadership transition during the first three years — including the financial implications of leader recruitment, interim leadership, and any continuity costs.

(4) Describe the school's plan if a major funding source identified in Section 6.3 is withdrawn or delayed.

SECTION 7

Facilities

Facilities are one of the most common sources of delay, cost overrun, and operational distress in new schools. This section asks you to demonstrate that the school has a viable facilities plan and that the team responsible for executing it has the capacity to do so.

7.1 Facility Identification and Status

QUESTION 7.1.1

Describe the proposed facility for Year 1 of the school.

(1) Identify the proposed facility (address, square footage, configuration), or, if a facility has not yet been secured, describe the facilities search process and timeline.

(2) Describe the legal structure of the school's occupancy — lease, purchase, ownership, or other arrangement — and the financial terms.

(3) Describe how the facility supports the instructional model and the staffing model described in Sections 2 and 5 — including classroom configuration, intervention spaces, and any specialized spaces required by the model.

QUESTION 7.1.2

Describe the facilities readiness plan.

Identify all required improvements, renovations, or build-out needed to bring the facility to operational readiness, the timeline for completion, and the funding source for those improvements. If the school is in a multi-year facilities ramp — with additional grades requiring additional space over time — describe the long-term facilities plan.

> **REQUIRED ATTACHMENT:** Lease, letter of intent, or facilities agreement (if available).
>
> **REQUIRED ATTACHMENT:** Facilities improvement plan and budget.

SECTION 8

Compliance and Conditional Sections

This section captures additional plans required of all applicants and conditional sections that apply only to certain applicants.

8.1 Transportation

QUESTION 8.1.1

Describe the school's transportation plan.

Describe how the school will provide transportation to students who require it under Ohio law, the school's relationship with the local school district for transportation services, and any school-provided transportation arrangements.

8.2 Food Service

QUESTION 8.2.1

Describe the school's food service plan.

Describe the school's plan for providing breakfast and lunch (and any other meals), including participation in the National School Lunch Program and any partnerships with food service vendors.

8.3 Community Partnerships

QUESTION 8.3.1

Describe the school's plans for community engagement and partnerships.

Describe how the school will engage families and community members in the school's ongoing work, and any community partnerships that will support the school's mission, instructional model, or student supports.

8.4 Blended or Virtual Learning (if applicable)

QUESTION 8.4.1

If the school will use blended or virtual learning components, describe the model in detail.

(1) Describe the proportion of student instructional time that will be delivered through digital, online, or blended formats.

(2) Describe the digital instructional resources the school will use, the research base for those resources, and the role of the teacher when students are working in digital environments.

(3) Describe how the school will ensure that blended or virtual learning components meet the same standard for cognitive demand, student thinking, and progress monitoring described in Section 2.1.

(4) Describe the school's technology infrastructure plan, including devices, internet access, and technical support.

SECTION 9

Required Attachments Checklist

Use this checklist to verify that every required attachment is included in your application. Applications submitted without all required attachments will be considered incomplete.

Required Attachments Checklist

Use this checklist to verify that every required attachment is included in your application. Applications submitted without all required attachments will be considered incomplete.

☐ 1. Articles of Incorporation (or draft, with filing timeline) (Cover Sheet)

☐ 2. IRS 501(c)(3) determination letter (or evidence of application) (Cover Sheet)

☐ 3. Market research data — demographic data sources, school performance data, and community-level analysis (Section 1.2)

☐ 4. Letters of support from community members and organizations (Section 1.2)

☐ 5. Instructional artifacts (instructional vision document and/or instructional playbook) (Section 2.1.A)

☐ 6. Complete list of curriculum for ELA, math, history, civics, and science for every grade level, including supplemental materials, with EdReports or What Works Clearinghouse ratings (Section 2.1.B)

☐ 7. Sample lessons from two different grade levels illustrating implementation of the curriculum consistent with the school's instructional model (Section 2.1.B)

☐ 8. The school's classroom observation tool and any rubrics or look-fors used during observations (Section 2.1.C)

☐ 9. The school's data meeting protocol, including cadence, participants, artifacts reviewed, and outputs produced (Section 2.1.D)

☐ 10. A sample data analysis cycle showing how student work or assessment data is reviewed, analyzed, and converted into instructional response (Section 2.1.D)

☐ 11. Schedule for professional development showing structure, frequency, and focus across the school year (Section 2.1.E)

☐ 12. The school's observation and coaching protocol, including cadence, feedback structure, action-step format, and follow-up mechanism (Section 2.1.E)

☐ 13. Proposed school calendar and sample daily/weekly schedule for the lowest and highest grades served in Year 1 (Section 2.2)

☐ 14. Draft Special Education Procedures Manual or detailed outline of policies (Section 2.3)

☐ 15. Student culture and climate artifacts (culture vision, culture playbook, behavior management system, discipline policies, escalation protocols, attendance policy and intervention protocol, SEL curriculum or framework, and others as available) (Section 2.4)

☐ 16. Draft Student and Family Handbook, including discipline policy and procedures (Section 2.4)

☐ 17. Verifiable academic outcome data for any school or setting cited as evidence of prior success (Section 3.1)

☐ 18. Founding team member resumes and signed time commitment statements (Section 3.2)

☐ 19. If replication: state report cards or comparable accountability data for all existing schools in the network for the most recent three years (Section 3.4)

☐ 20. If replication: documentation of the replication relationship (management agreement, services agreement, or MOU) (Section 3.4)

☐ 21. Draft bylaws of the governing body (Section 4.1)

☐ 22. Draft policies governing board composition, committee structure, and meeting procedures (Section 4.1)

☐ 23. Founding board member resumes and signed conflict of interest disclosures (Section 4.2)

☐ 24. Draft conflict of interest policy and code of ethics (Section 4.4)

☐ 25. Decision-making matrix in tabular form (Section 4.5)

☐ 26. Draft management agreement, services agreement, or term sheet (CMO/management organization applicants only) (Section 4.5)

☐ 27. Organizational charts for Year 1 and for the school at full enrollment (Section 5.1)

☐ 28. Draft enrollment policy and lottery procedures (Section 5.4)

☐ 29. Five-year budget in spreadsheet form, with revenue and expense detail and end-of-year fund balances (Section 6.1)

☐ 30. Budget narrative explaining all major assumptions (Section 6.1)

☐ 31. Draft fiscal policies and procedures manual (Section 6.2)

☐ 32. Month-by-month cash flow projection for Year 1, with all assumptions documented (Section 6.3)

☐ 33. Binding commitment documentation for July–November cash flow funding (signed term sheets, grant agreements, loan agreements, or advance agreements). Letters of intent are not acceptable. (Section 6.3)

☐ 34. Pre-opening timeline and budget (Section 6.4)

☐ 35. Lease, letter of intent, or facilities agreement (if available) (Section 7.1)

☐ 36. Facilities improvement plan and budget (Section 7.1)

SECTION 10

Assurances and Certification

By submitting this application, the applicant certifies that all information contained herein is accurate and complete to the best of their knowledge, and that the applicant agrees to comply with all applicable federal, state, and local laws and regulations governing public community schools in Ohio.

The applicant assures Fordham that:

- The school will operate as a non-profit corporation governed by an independent board of directors.
- The school will comply with all applicable provisions of Ohio Revised Code Chapter 3314 and other applicable laws.
- The school will be open to all eligible students and will conduct admissions through a lottery if applications exceed capacity.
- The school will comply with all federal civil rights laws, including Section 504 of the Rehabilitation Act, the Individuals with Disabilities Education Act, Title VI of the Civil Rights Act, Title IX of the Education Amendments, and the Americans with Disabilities Act.
- The school will participate in all required state assessments and will comply with all state accountability and reporting requirements.
- The school will comply with all sponsorship requirements of the Thomas B. Fordham Foundation, including site visits, reporting, and corrective action processes.

Certification

I certify that I am authorized to submit this application on behalf of the applicant entity, and that the information contained in this application is accurate and complete to the best of my knowledge.

Signature of Authorized Representative

Printed Name and Title

Date