THOMAS B. FORDHAM FOUNDATION

Office of Charter School Sponsorship

New School Application Evaluation Rubric

Standard Pathway

Fall 2026 Application Cycle
For Reviewer Use

Reviewer Expectations and Process

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.

Reviewers should read the application in full before scoring any section. Reviewers should also have read the Instructional Excellence Framework (IEF), which is the substantive standard against which the Instructional Plan section of the application is evaluated.

Application Process

A team of evaluators will review applications and interview applicants. Interviews will take place at the Fordham Dayton office and will include the school developer and/or school leadership, governing authority, and financial representative.

Conflict of Interest and Confidentiality

All reviewers, internal and external, must complete the Fordham Foundation's Conflict of Interest Disclosure and Confidentiality Statement. Submit by email to Theda Sampson (tsampson@fordhamfoundation.org). Notify Theda as soon as possible if a conflict or the appearance of a conflict arises.

Public Records

Notes, communication, and other materials related to the application review may constitute public documents and may be subject to Ohio's open records laws.

Rating Scale and Cut Score

Reviewers use a four-band rating scale to evaluate each rubric section. Each section's page contains anchor descriptions of what Meets the Standard and Does Not Meet the Standard look like for that specific section. Reviewers should use those section-specific anchors, together with the section's evaluation criteria, to determine the appropriate rating.

> **Meets the Standard.** The response reflects a thorough understanding of the section's substantive expectations. It addresses the criteria with specific, accurate, operationally detailed information; presents a clear, realistic picture of how the school will operate; and inspires confidence in the applicant's capacity to deliver on the plan described.
>
> **Approaches the Standard.** The response meets the criteria in many respects but lacks specificity, operational detail, or evidence in one or more areas. The applicant's intent is clear, but execution capacity is not yet fully demonstrated.
>
> **Partially Meets the Standard.** The response addresses the criteria in some respects but has substantial gaps. Key operational systems, evidence, or required attachments are missing or under-developed.
>
> **Does Not Meet the Standard.** The response is sorely under-developed, incomplete, or absent. It demonstrates a lack of preparation, or raises substantial concerns about the viability of the plan or the applicant's capacity to execute it.

Cut Score

Applicants must receive a cut score of 75% of the total possible score to be considered for board approval. The full Evaluation Team must also agree to recommend the application be advanced to the Fordham Board's Ohio Committee. Both conditions are required.

Scoring Mechanics

Each rubric section is scored on a 3-2-1-0 scale corresponding to Meets / Approaches / Partially Meets / Does Not Meet. There are eight rubric sections (Section 1 through Section 7, with the Educational Plan split across two rubric pages — Instructional Plan and Educational Plan: Other). Maximum total score is 24. The 75% cut score requires a minimum of 18 points.

Compliance and Required Attachments

Compliance and Conditional Sections (Section 8 of the application) and Assurances and Certification (Section 10) are not separately scored in this rubric. Compliance gaps, if any, should be flagged in the summary narrative. Required Attachments (Section 9) are evaluated as part of the relevant content section — the Section 9 checklist is a verification tool, not a scoring instrument.

Section 1 — School Identity and Demand

Application Sections: 1.1 Mission and Vision · 1.2 Market Research and Student Population

WHAT MEETS THE STANDARD LOOKS LIKE

The mission is clear, cogent, and operationally specific — it names the school's distinctive identity, the population it intends to serve, and the academic outcomes it will hold itself accountable to. Market research demonstrates genuine demand grounded in data, not assertion. The applicant has identified a real gap in the local educational landscape and shows credible evidence that families will choose this school.

WHAT DOES NOT MEET THE STANDARD LOOKS LIKE

The mission is generic, aspirational, or interchangeable with any other charter school. Market research is thin or absent — no demographic data, no analysis of existing capacity, no evidence of community demand. The case for opening this school in this community is not effectively made.

EVALUATION CRITERIA

- ☐ Mission and vision are specific to this school and this community, not boilerplate.
- ☐ Target student population is clearly defined with demographic specificity.
- ☐ Market research includes verifiable data: demographic trends, school performance data, existing school capacity, and demonstrated demand.
- ☐ Letters of support from community members and organizations are present and reflect genuine engagement.

ARTIFACTS TO REVIEW

- Market research data (demographic data sources, school performance data, community-level analysis)
- Letters of support from community members and organizations

REVIEWER NARRATIVE

Strengths
Concerns

RATING

Meets the Standard	Approaches	Partially Meets	Does Not Meet
☐	☐	☐	☐

Section 2.1 — Instructional Plan

Application Subsections: 2.1.A Vision and Observable Practice · 2.1.B Curriculum and Implementation · 2.1.C Classroom Practice · 2.1.D Data Systems and Promotion · 2.1.E Professional Learning and Instructional Leadership · 2.1.F Tiered Support and Intervention

> **EVALUATED AGAINST THE IEF.** *The Instructional Plan is the substantive core of the application. It is evaluated against the Instructional Excellence Framework (IEF), which describes what teaching and learning are expected to look like in a Fordham-sponsored school. Reviewers should have read the IEF in full and use its definitions of strong practice — knowledge-rich curriculum, explicit instruction grounded in cognitive science, structured culture, sustained attention, high cognitive lift, responsive checking for understanding, durable practice and consolidation, and disciplined tiered support — when scoring this section.*

WHAT MEETS THE STANDARD LOOKS LIKE

The applicant describes an instructional model that visibly produces what the IEF requires. Curriculum is named by title, meets the HQIM standard or carries substantive evidentiary justification, and includes science of reading alignment in ELA. Classroom practice descriptions are concrete and observable. Data systems are framed as engines of instructional response, not just measurement. Professional learning addresses both pedagogy and subject-matter knowledge. Required artifacts are present and operationally specific — they could be handed to a teacher tomorrow.

WHAT DOES NOT MEET THE STANDARD LOOKS LIKE

The instructional model is described in generic language without operational specificity. Curriculum selections are not named, not rated, or not defensible. Classroom practice is described in IEF vocabulary without evidence the applicant understands how to produce it. Required artifacts are missing, generic, or restate the IEF rather than show the school's own design. Data systems are framed as measurement, not response.

EVALUATION CRITERIA

- ☐ Instructional vision is specific, observable, and coherent with IEF principles — without restating the IEF verbatim.
- ☐ Curriculum is named by title for every subject and grade band, with EdReports/WWC/ODEW ratings provided or substantive evidentiary basis for unrated subjects.
- ☐ Science of reading alignment is confirmed in ELA with specific features identified.
- ☐ Knowledge-building across subjects (including science, social studies, civics) is addressed.
- ☐ Classroom practice descriptions are concrete: techniques are named, participation is engineered, scaffolding-up is the response to struggle, whole-class checking is structured.
- ☐ Data systems produce instructional response — a named data-to-reteach cycle is described, with cadence, participants, and artifacts.
- ☐ Professional learning includes intellectual preparation time, observation and coaching, and ongoing development of teacher subject-matter knowledge.
- ☐ Tiered support and intervention are integrated with Tier 1 instruction and aligned to Ohio MTSS guidance.

ARTIFACTS TO REVIEW

- Instructional artifacts (instructional vision document and/or instructional playbook)
- Complete curriculum list with EdReports/WWC/ODEW ratings
- Sample lessons from two different grade levels
- Classroom observation tool and rubrics or look-fors
- Data meeting protocol
- Sample data analysis cycle
- Professional development schedule
- Observation and coaching protocol

REVIEWER NARRATIVE

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RATING

Meets the Standard	Approaches	Partially Meets	Does Not Meet
☐	☐	☐	☐

Section 2 — Educational Plan: Calendar, Special Populations, Climate, Goals

Application Subsections: 2.2 Calendar, Schedule, and Structure · 2.3 Special Populations · 2.4 School Climate and Student Supports · 2.5 Performance Goals

WHAT MEETS THE STANDARD LOOKS LIKE

Calendar and schedule align to the instructional model, with protected instructional time and a credible rationale for any extended-day or extended-year design choices. Plans for students with disabilities, English learners, and gifted students are compliant with federal and state law and reflect a coherent instructional philosophy — not just procedural compliance. School climate and discipline systems are structured, developmentally appropriate, and integrated with attendance and behavior supports. Performance goals are SMART, mission-aligned, and include both academic and non-academic metrics.

WHAT DOES NOT MEET THE STANDARD LOOKS LIKE

Calendar and schedule are generic or disconnected from the instructional plan. Special populations are addressed only as compliance items, without an instructional philosophy or evidence that staff are prepared. Discipline policies are punitive or insufficiently developed; attendance is treated as secondary. Performance goals are vague, easily achieved, or disconnected from the school's mission.

EVALUATION CRITERIA

- ☐ Calendar and daily/weekly schedule align with the instructional model and protect instructional time.
- ☐ Plans for students with disabilities address IDEA and Section 504 compliance and articulate an instructional approach.
- ☐ Plans for English learners comply with Title VI and Title III and address language development across content areas.
- ☐ Gifted student identification, programming, and Written Education Plans (WEPs) are described.
- ☐ School climate and discipline policies are research-informed, developmentally appropriate, and include due process.
- ☐ Attendance plan includes Tier 1, 2, and 3 strategies aligned to AttendanceWorks-style frameworks.
- ☐ Academic and non-academic performance goals are SMART and aligned to school mission.

ARTIFACTS TO REVIEW

- Proposed school calendar and sample daily/weekly schedule
- Draft Special Education Procedures Manual (or detailed outline)
- Student culture and climate artifacts
- Draft Student and Family Handbook

REVIEWER NARRATIVE

Strengths
Concerns

RATING

Meets the Standard	Approaches	Partially Meets	Does Not Meet
☐	☐	☐	☐

Section 3 — Leadership and Founding Team Capacity

Application Subsections: 3.1 Prior Success in Raising Student Achievement · 3.2 Founding Team Capacity, Roles, and Time Commitment · 3.3 Leadership Recruitment and Succession Planning · 3.4 Replication Capacity

WHAT MEETS THE STANDARD LOOKS LIKE

The founding team has documented prior success raising student achievement with similar student populations, ideally using a similar instructional model. Each team member's role, time commitment, and qualifications are specified. School leadership is identified (or a credible recruitment plan exists), with succession planning addressed. For replication applicants, the relationship with the parent network is clearly defined and supported by current network performance data.

WHAT DOES NOT MEET THE STANDARD LOOKS LIKE

Prior success is asserted but not documented with verifiable data, or the cited success is irrelevant to the proposed school's population or model. The founding team is under-credentialed, over-extended, or lacks the operational/instructional/financial expertise needed. Leadership is unidentified with no credible recruitment plan. For replications, the parent network's performance is weak or undocumented.

EVALUATION CRITERIA

- ☐ Documented prior success raising student outcomes with similar populations and instructional models.
- ☐ Founding team roles, time commitments, and qualifications are specified.
- ☐ Instructional, operational, governance, and financial capacity are all represented on the team.
- ☐ School leader is identified or a credible recruitment and selection plan is in place.
- ☐ Succession planning addresses leadership continuity beyond the founding leader.
- ☐ If replication: current network performance is strong, with state report cards or comparable accountability data.
- ☐ If replication: the replication relationship is documented (management agreement, services agreement, or MOU).

ARTIFACTS TO REVIEW

- Verifiable academic outcome data for any cited school or setting
- Founding team member resumes and signed time commitment statements
- If replication: state report cards for existing network schools, most recent three years
- If replication: documentation of replication relationship

REVIEWER NARRATIVE

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RATING

Meets the Standard	Approaches	Partially Meets	Does Not Meet
☐	☐	☐	☐

Section 4 — Governance

Application Subsections: 4.1 Governing Body Structure and Authority · 4.2 Board Composition and Capacity · 4.3 Board Training and Self-Assessment · 4.4 Conflict of Interest and Ethics · 4.5 Decision-Making Authority and the Board–CMO Relationship

WHAT MEETS THE STANDARD LOOKS LIKE

The governing board has the independent authority, expertise, and composition necessary to oversee a charter school in Ohio. Board members bring relevant experience across instruction, finance, governance, and community engagement. A board training plan is in place. Conflict of interest policies are documented and enforced. For schools with a management organization, the board demonstrates clear independent authority — including the power to terminate the management relationship if necessary.

WHAT DOES NOT MEET THE STANDARD LOOKS LIKE

The board lacks independent authority, is captured by the management organization, or lacks the expertise to perform fiduciary and oversight functions. Board composition is thin in critical domains. Conflict of interest policies are weak or unenforced. The Board–CMO decision-making boundary is unclear or improperly delegates non-delegable authority.

EVALUATION CRITERIA

- ☐ Governing body has independent authority and is properly constituted under Ohio law.
- ☐ Board composition reflects the range of expertise needed: instruction, finance, governance, legal, community.
- ☐ Board training plan addresses fiduciary duties, charter school oversight, and academic accountability.
- ☐ Conflict of interest and ethics policies are documented and operationally enforceable.
- ☐ Decision-making authority is clearly mapped between the board and any management organization.
- ☐ Board self-assessment cadence and process are described.
- ☐ If CMO-managed: documentary evidence of the board's independent authority to dismiss the management organization.

ARTIFACTS TO REVIEW

- Draft bylaws of the governing body
- Draft policies governing board composition, committee structure, meeting procedures
- Founding board member resumes and signed conflict of interest disclosures
- Draft conflict of interest policy and code of ethics
- Decision-making matrix in tabular form

- If applicable: draft management agreement, services agreement, or term sheet

REVIEWER NARRATIVE

Strengths
Concerns

RATING

Meets the Standard	Approaches	Partially Meets	Does Not Meet
☐	☐	☐	☐

Section 5 — Operations and Staffing

Application Subsections: 5.1 Organizational Structure and Management · 5.2 Staffing Plan and Recruitment · 5.3 Staff Evaluation and Performance Management · 5.4 Student Enrollment and Recruitment

WHAT MEETS THE STANDARD LOOKS LIKE

The organizational structure supports the instructional model — roles are named, reporting lines are clear, and instructional leadership has protected time. The staffing plan is realistic for the budget and recruitment timeline; teacher recruitment strategies are specified. Staff evaluation systems are coherent with the school's instructional vision and tied to observable practice. Enrollment policies are compliant, equitable, and operationally credible.

WHAT DOES NOT MEET THE STANDARD LOOKS LIKE

Organizational charts are generic or inconsistent with the instructional model described in Section 2.1. Staffing assumptions are unrealistic for the budget. Teacher recruitment is asserted without strategy. Staff evaluation is procedural rather than instructional. Enrollment policies are non-compliant or lack operational detail.

EVALUATION CRITERIA

- ☐ Organizational structure supports the instructional model and protects instructional leadership time.
- ☐ Staffing plan is realistic for the budget, with credible recruitment strategy.
- ☐ Teacher recruitment strategies address how the school will attract candidates with relevant content knowledge.
- ☐ Staff evaluation system is tied to observable practice and the school's instructional vision.
- ☐ Performance management, succession, and turnover are addressed.
- ☐ Enrollment policy is compliant with Ohio law and does not discriminate.
- ☐ Lottery procedures are documented and operationally clear.

ARTIFACTS TO REVIEW

- Organizational charts for Year 1 and at full enrollment
- Draft enrollment policy and lottery procedures

REVIEWER NARRATIVE

Strengths
Concerns

RATING

Meets the Standard	Approaches	Partially Meets	Does Not Meet
☐	☐	☐	☐

Section 6 — Financial Plan

Application Subsections: 6.1 Budget and Financial Projections · 6.2 Financial Management and Internal Controls · 6.3 Cash Flow and Pre-Opening Funding · 6.4 Pre-Opening Plan

WHAT MEETS THE STANDARD LOOKS LIKE

The five-year budget is internally consistent with the staffing plan, instructional plan, and facilities plan. Revenue and expense assumptions are documented and conservative. The school will be financially viable from Year 1 through full enrollment with appropriate fund balances. Internal controls and fiscal policies are documented. Cash flow projections for the critical July–November pre-opening window are realistic, and binding commitment documentation is present for any pre-opening funding sources.

WHAT DOES NOT MEET THE STANDARD LOOKS LIKE

Budget assumptions are unrealistic, undocumented, or inconsistent with other parts of the application. The school is financially unsustainable in early years or at full enrollment. Internal controls are weak or undefined. Pre-opening cash flow lacks binding commitment documentation — letters of intent only, no signed agreements.

EVALUATION CRITERIA

- ☐ Five-year budget is internally consistent with staffing, instructional, and facilities plans.
- ☐ Revenue and expense assumptions are documented and conservative.
- ☐ End-of-year fund balances are sufficient to ensure ongoing financial viability.
- ☐ Fiscal policies and procedures are documented; internal controls are appropriate.
- ☐ Month-by-month cash flow projection for Year 1 is realistic and credible.
- ☐ Binding commitment documentation for July–November cash flow is present (signed term sheets, grant agreements, loan agreements, or advance agreements — not letters of intent).
- ☐ Pre-opening timeline and budget are present and operationally credible.

ARTIFACTS TO REVIEW

- Five-year budget in spreadsheet form with revenue and expense detail
- Budget narrative explaining all major assumptions
- Draft fiscal policies and procedures manual
- Month-by-month cash flow projection for Year 1
- Binding commitment documentation for July–November cash flow funding
- Pre-opening timeline and budget

REVIEWER NARRATIVE

Strengths
Concerns

RATING

Meets the Standard	Approaches	Partially Meets	Does Not Meet
☐	☐	☐	☐

Section 7 — Facilities

Application Subsection: 7.1 Facilities Plan

WHAT MEETS THE STANDARD LOOKS LIKE

The facilities plan identifies a specific facility or a credible plan to obtain one consistent with the school's opening timeline. The facility supports the instructional model and serves the projected enrollment. Costs are integrated with the budget. Any required improvements are scoped, budgeted, and credible.

WHAT DOES NOT MEET THE STANDARD LOOKS LIKE

No facility is identified and the plan to obtain one is vague. Facility size or configuration is inconsistent with enrollment or the instructional model. Facility costs are undocumented or inconsistent with the budget. Required improvements lack scope, budget, or timeline.

EVALUATION CRITERIA

- ☐ Specific facility identified or credible plan to obtain one within the opening timeline.
- ☐ Facility size and configuration support the instructional model and projected enrollment.
- ☐ Facility costs are documented and integrated with the budget.
- ☐ Any required improvements are scoped, budgeted, and on credible timeline.
- ☐ Ownership/lease structure is described.

ARTIFACTS TO REVIEW

- Lease, letter of intent, or facilities agreement (if available)
- Facilities improvement plan and budget

REVIEWER NARRATIVE

Strengths
Concerns

RATING

Meets the Standard	Approaches	Partially Meets	Does Not Meet
☐	☐	☐	☐

Summary Scoring and Recommendation

Scoring Table

Enter the rating for each rubric section. Each row corresponds to one rubric page in this document. Point values: Meets = 3, Approaches = 2, Partially = 1, Does Not Meet = 0.

Rubric Section	Meets	Approaches	Partially	Does Not Meet
Section 1 — School Identity and Demand	☐	☐	☐	☐
Section 2.1 — Instructional Plan	☐	☐	☐	☐
Section 2 — Educational Plan: Other (2.2–2.5)	☐	☐	☐	☐
Section 3 — Leadership and Founding Team	☐	☐	☐	☐
Section 4 — Governance	☐	☐	☐	☐
Section 5 — Operations and Staffing	☐	☐	☐	☐
Section 6 — Financial Plan	☐	☐	☐	☐
Section 7 — Facilities	☐	☐	☐	☐

Total Score and Cut Score

Total Score: _____ / 24

Cut Score (75% = 18 points) Met: ☐ Yes ☐ No

Team Recommendation

The Evaluation Team must agree on the recommendation.

☐ Approve — Recommend the application be advanced to the Fordham Board's Ohio Committee.

☐ Approve with Conditions — Recommend approval contingent on the applicant satisfying specified conditions prior to opening.

☐ Decline — Recommend the application be denied.

Rationale and Compliance Notes

Final Recommendation Rationale
Compliance and Conditional Sections — Flags or Concerns (if any)

Team Lead Signature: _____ Date: _____