

## Charter Application Review Process

### Overview

At two points during the charter school application process – once before the interview and once after the interview – the third party evaluator will construct a review of each charter applicant for the Department.

Each review consists of two documents:

- A detailed feedback form, and
- An Executive Summary that summarizes the evaluator’s recommendation to the Department.

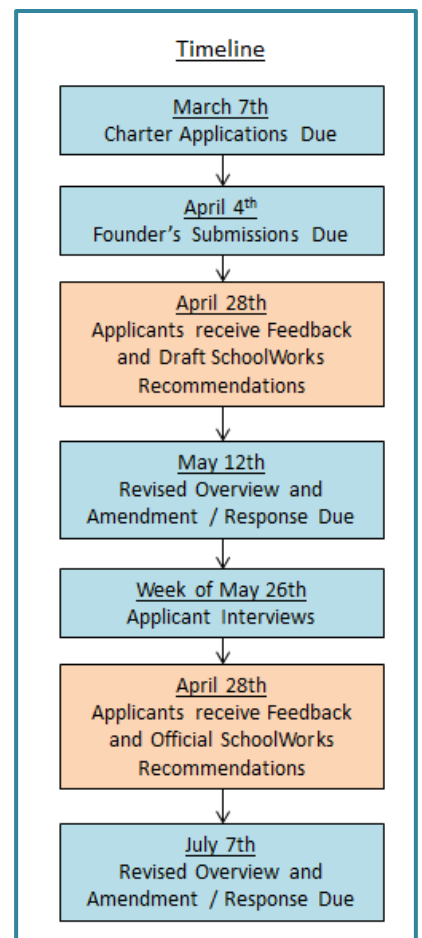
After the first review the Department will provide the review documents to applicants so that applicants may use them to prepare for the interview. The evaluator’s recommendation in this review will be considered only a draft recommendation, subject to change based on an applicant’s performance in the interview.

After the second review the Department will again provide both review documents to applicants. The Executive Summary from the evaluator will include the evaluator’s official recommendation to the Department.

The evaluator’s official recommendation will inform the Department’s decision on whether to recommend that BESE authorize the charter schools proposed by each charter applicant.

On the following pages you will find two documents:

- (1) The first document, beginning on page 2, is the detailed feedback form that the evaluator will complete while reviewing all of your written submissions and then update after the interview.
- (2) The second document, beginning on page 12, is the Executive Summary template that the evaluator will complete twice – once to communicate their draft recommendation and once to communicate their official recommendation to the Department.



## Feedback Form

For each applicant, evaluators will complete a new operator or experienced operator feedback form. Both forms can be found on the following pages.

Evaluators will assess applicant submissions according to three sets of criteria:

- (1) **Capacity.** Evaluators will assess whether the assembled team has the knowledge and skills to continuously assess, revise, and execute the plans put forth in the application.
- (2) **Planning.** Evaluators will assess whether you address all relevant features of your school (principles, plans, programs, strategies, etc...) in each section of the application, and whether you describe how these features will be integrated by showing how they will play out in daily life at the school.
- (3) **Alignment.** Evaluators will assess whether the mindsets and abilities of your school's leaders and the plans you present in each section are consistent with each other and with the mission you have set forth to guide all of your actions and decisions.

In addition, applicants should be mindful of:

- **Clarity.** Evaluators may not be able to assess capacity, plans, or alignment if an applicant's response lacks relevant information, includes inconsistent information, or is difficult to decipher.
- **Evidence.** In cases where an applicant refers to evidence or a research-based practice, evaluators will not consider the evidence to be valid unless a citation is provided.

The completed feedback form will not include any sort of rating of applicant's standing in each section. Evaluators will use the completed feedback form to complete the Executive Summary template found on page 12.

Weight will be given in the Executive Summary to four particular themes:

- Overall mission alignment across the application,
- Capacity of the school leader and founding board members,
- Clarity and comprehensiveness of the educational model articulated in the theory of change section, and
- Concerns about the proposed school's ability to operate based on (a) the capacity or plans in any section or (b) lack of alignment in any section.

## New Operator Feedback Form

Section	Capacity	Plans	Alignment
Mission and Vision	<p>Evaluator feedback will discuss the extent to which the leadership team possesses the ability to:</p> <ul style="list-style-type: none"> <li>• Make the mission and vision relevant to key stakeholders and sufficient staff to operate a school, and</li> <li>• Execute a rational and reasonable strategy for determining when to release a staff member who is not mission-aligned.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the mission includes:</p> <ul style="list-style-type: none"> <li>• Purpose – opportunities and needs your school exists to address</li> <li>• Business – why a school is the best approach to meet these needs and opportunities</li> <li>• Values – the social good that your school will produce for Louisiana</li> </ul>	<p>Evaluator feedback will discuss the extent to which the founding team:</p> <ul style="list-style-type: none"> <li>• Clearly describes how the school will be able to demonstrate that it has achieved its vision when it's charter contract is up for renewal after five years of operation, and</li> <li>• Presents a sound argument that confirms that working towards the mission will allow the school to reach its vision.</li> </ul>
Community Needs	<p>Evaluator feedback will discuss the extent to which the leadership team possesses the ability to:</p> <ul style="list-style-type: none"> <li>• Revise the school's recruitment strategy to ensure sufficient demand if the demographics of the school's community change, and</li> <li>• Assess whether partnerships with community organizations need to be modified or discontinued by developing clear expectations and a process for evaluation.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Clearly defines the demographic characteristics of the target student population to be served,</li> <li>• Demonstrates that there is sufficient demand from families for seats at the school, and</li> <li>• Lists community organizations that have formally committed to supporting the school and the ways in which they will provide support.</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• Making gains with every student included in the target student population would help the school achieve its mission, and</li> <li>• The school forms mission-aligned partnerships with community support organizations.</li> </ul>
Goals and Performance Targets	<p>Evaluator feedback will discuss the extent to which the leadership team possess the ability to:</p> <ul style="list-style-type: none"> <li>• Model data-driven decision-</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Describes curricular offerings that will prepare students to succeed</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• The application provides a comprehensive set of goals that</li> </ul>

	<p>making for staff,</p> <ul style="list-style-type: none"> <li>• Provide frequent opportunities and appropriate coaching for staff to use data to learn and adapt</li> <li>• Reward successful staff members with opportunities to assume additional responsibilities, and</li> <li>• Challenge staff to find innovative ways to guide the hardest to serve students to reach their full potential.</li> </ul>	<p>on PARCC tests,</p> <ul style="list-style-type: none"> <li>• Articulates clear goals for annual performance, including but not limited to goals on PARCC,</li> <li>• Provides a convincing rationale for why goals are ambitious but attainable for all students, and</li> <li>• Lists data that will be collected on a routine basis to ensure that the school is on track to achieve goals.</li> </ul>	<p>the school can use to fully assess whether it is on track to achieve its mission and vision.</p>
Theory of Change <sup>1</sup>	<p>Evaluator feedback will discuss the extent to which the leadership team possesses the ability to:</p> <ul style="list-style-type: none"> <li>• Ensure staff investment in the educational model by hiring staff members who believe in the model,</li> <li>• Continuously assess to ensure that staff are invested in the model, and</li> <li>• Make adjustments if they become disinvested.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Describes the essential programs, principles, and structures that will lead to student success,</li> <li>• Articulates the positive academic and behavioral effects that these programs, principles, and structures will have on students on a daily basis, and</li> <li>• Provides evidence that these programs, principles, and structures can be effective.</li> </ul>	<p>Evaluator feedback will discuss the extent to which essential programs, principles, and structures:</p> <ul style="list-style-type: none"> <li>• Do not conflict with each other, and</li> <li>• Align with the mission.</li> </ul>
Risks and Associated Contingency Plans	<p>Evaluator feedback will discuss the extent to which the leadership team possesses the ability to:</p> <ul style="list-style-type: none"> <li>• Develop and follow a protocol for regularly and thoroughly</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Acknowledges the greatest risks to the success of the school, and</li> <li>• Directly addresses each risk by</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• Risks described in the application threaten the ability of the school to achieve its mission, and</li> </ul>

<sup>1</sup> A theory of change synthesizes all of your conclusions about the best way to operate a school – from reading, research, or observation – into one statement. All of the fundamental pieces of your educational model should align directly with your theory of change.

	<p>scrutinizing the organization for vulnerabilities, and</p> <ul style="list-style-type: none"> <li>• Seeks organizational improvement by encouraging staff to point out vulnerabilities and welcoming solutions that address them.</li> </ul>	<p>including a contingency plan that minimizes the likelihood - to the best of the leadership team's ability - that the risk will come to fruition.</p>	<ul style="list-style-type: none"> <li>• Contingency plans would minimize the damage done towards achieving the mission.</li> </ul>
Leadership Track Record	<p>Evaluator feedback will discuss the extent to which the leadership team:</p> <ul style="list-style-type: none"> <li>• Takes responsibility for school performance by consistently identifying the causes to problems as a result of their own behaviors, and</li> <li>• Establishes a culture of trust between administrators, teachers, parents, and students.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Presents a leader who has led a similar school to outperform other schools available to its students (if applicable).</li> </ul>	<p>Evaluator feedback will discuss the extent to which the leader:</p> <ul style="list-style-type: none"> <li>• Can clearly articulate the school's mission,</li> <li>• Uses the mission to make decisions, and</li> <li>• Empowers staff to use the mission as a decision-making tool by setting an example through his or her own decisions.</li> </ul>
Board Capacity	<p>Evaluator feedback will discuss the extent to which board leadership:</p> <ul style="list-style-type: none"> <li>• Can clearly articulate a personal stake in ensuring that the school achieves its mission, and</li> <li>• Makes decisions based on facts regardless of how decisions might affect relationships with school leaders.</li> </ul>	N/A	<p>Evaluator feedback will discuss the extent to which the board leaders:</p> <ul style="list-style-type: none"> <li>• Can clearly articulate the school's mission, and</li> <li>• Uses the mission to make critical decisions.</li> </ul>
Financial Readiness	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• A board member can clearly articulate how the board's financial reporting structure is set up to ensure that the school</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• Control systems ensure that only allowable expenses are made and that they are coded appropriately, and</li> </ul>	<p>Evaluator feedback will discuss the extent to which school leadership:</p> <ul style="list-style-type: none"> <li>• Protects mission-critical expenses when faced with budget cuts.</li> </ul>

	<p>remains solvent, and</p> <ul style="list-style-type: none"> <li>• A school leadership team member - who can cogently articulate the rationale behind the systems of control - takes ownership for ensuring proper accounting.</li> </ul>	<ul style="list-style-type: none"> <li>• Risk of financial mismanagement is reduced by appropriate checks and balances.</li> </ul>	
Special Populations	<p>Evaluator feedback will discuss the extent to which the school leader possesses the ability to:</p> <ul style="list-style-type: none"> <li>• Hold staff accountable for employing consequences that minimize the loss of learning time, and</li> <li>• Create a culture of high expectations for all students, including special education students and English Language Learners.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Includes appropriate, feasible, equitable, and adequately resourced plans for recruiting, identifying, and serving all special education and English Language Learner students</li> <li>• Includes explicit roles for parents and guardians in legal and special education decisions,</li> <li>• Includes appropriate, feasible, fair, and legal plans for issuing consequences, and</li> <li>• Describes recruitment, admissions, and enrollment practices that ensure that all students will have access to the school.</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• Opportunities for special education and English Language Learner students are aligned to the mission, and</li> <li>• The school's approach to discipline aligns with the mission.</li> </ul>
Financial Plan	N/A	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• Projections are based on accurate, conservative, and legally compliant assumptions,</li> <li>• The financial plan includes evidence that funds from external</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• The budget prioritizes mission-aligned expenses, and</li> <li>• The facilities plan articulated in the budget describes a facility with functionality aligned to the</li> </ul>

		<p>sources are guaranteed,</p> <ul style="list-style-type: none"> <li>• The financial plan adequately and appropriately funds all essential services,</li> <li>• The fund balance is in alignment with expectations described on page 12 of the <a href="#">Charter School Performance Compact</a>,</li> <li>• The debt-to-asset ratio is less than 0.9,</li> <li>• Financial statements demonstrate a plan for solvency,</li> <li>• Cash-flow projections describe an achievable plan to stay liquid at all times, and</li> <li>• There are no material findings in the non-profits most recent audited financial statements (if applicable).</li> </ul>	<p>school's mission.</p>
<p>Founder's Submission</p>	<p>Evaluator feedback will discuss the extent to which the founder:</p> <ul style="list-style-type: none"> <li>• Is able to enlist new team members before the charter application is approved, and</li> <li>• Empowers new team members to take ownership of the school by giving them ownership over elements of the work that they find meaningful</li> </ul>	<p>Evaluator feedback will discuss the extent to which the founder:</p> <ul style="list-style-type: none"> <li>• Presents personal qualifications that demonstrate credibility to found the type of charter school being proposed, and</li> <li>• Made specific revisions to the school model based on formal, detailed feedback</li> </ul>	<p>Evaluator feedback will discuss the extent to which the founder:</p> <ul style="list-style-type: none"> <li>• Presents personal experiences that inform the school's mission</li> </ul>

## Experienced Operator Feedback Form

Section	Capacity	Plans	Mission Alignment
Growth Plan	<p>Evaluator feedback will discuss the extent to which the organization’s leadership:</p> <ul style="list-style-type: none"> <li>• Will adapt to meet changing community needs for any school opening later than the first year in the growth plan by conducting a new needs assessment.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Clearly defines the demographic characteristics of the target student population to be served in all communities, and</li> <li>• Demonstrates that there is sufficient demand from families for seats at the school.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Clearly articulates the charter organization’s mission, and</li> <li>• Articulates how achieving the organization’s five-year growth plan in Louisiana fully aligns with the organization’s mission.</li> </ul>
Past School Performance	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• The organization can describe a cohesive and systematic strategy for acknowledging and learning from performance deficiencies rather than trying to downplay failures.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Demonstrates that the operator can successfully educate students who are demographically similar to the students they would serve in Louisiana, and</li> <li>• Provides assurance that the causes for any litigation, audit findings, or authorizer intervention would not harm future schools in Louisiana.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Demonstrates that the operator can successfully educate students in schools that use the same model(s) that the operator will employ in Louisiana.</li> </ul>
Theory of Change	<p>Evaluator feedback will discuss the extent to which the leadership team possesses the ability to:</p> <ul style="list-style-type: none"> <li>• Ensure staff investment in the educational model by hiring staff members who believe in the model,</li> <li>• Continuously assess to ensure that</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Describes the essential programs, principles, and structures that will lead to student success,</li> <li>• Articulates how these programs, principles, and structures will affect students academically and</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• Essential programs, principles, and structures do not conflict with each other, and</li> <li>• Essential programs align with the mission.</li> </ul>



	<p>staff are invested in the model, and</p> <ul style="list-style-type: none"> <li>• Make adjustments if they become disinvested.</li> </ul>	<p>behaviorally on a daily basis, and</p> <ul style="list-style-type: none"> <li>• Provides evidence that these programs, principles, and structures can be effective.</li> </ul>	
Scale Strategy	<p>Evaluator feedback will discuss the extent to which the central office:</p> <ul style="list-style-type: none"> <li>• Uses meaningful and accurate feedback to adjust the support provided to local implementers.</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• The central office provides sufficient financial and human capital resources to support the successful launch of new schools, and</li> <li>• The application clearly lists and differentiates between the responsibilities of the central office and local implementers</li> </ul>	N/A
Risks and Associated Contingency Plans	<p>Evaluator feedback will discuss the extent to which the leadership team:</p> <ul style="list-style-type: none"> <li>• Follows a protocol for regularly and thoroughly scrutinizing the organization for vulnerabilities, and</li> <li>• Seeks organizational improvement by encouraging staff to point out vulnerabilities and welcoming solutions that address them.</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Describes a process for regularly and thoroughly scrutinizing the organization for vulnerabilities.</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• Risks described in the application threaten the ability of the organization to achieve its mission, and</li> <li>• Contingency plans would minimize the damage done towards achieving the mission.</li> </ul>
Leadership Track Record	<p>Evaluator feedback will discuss the extent to which the leadership team:</p> <ul style="list-style-type: none"> <li>• Takes responsibility for school performance by consistently identifying the causes to problems as a result of their own behaviors,</li> </ul>	<p>Evaluator feedback will discuss the extent to which the application:</p> <ul style="list-style-type: none"> <li>• Presents a leader who has led a similar school to outperform other schools available to its students (if applicable).</li> </ul>	<p>Evaluator feedback will discuss the extent to which the leader:</p> <ul style="list-style-type: none"> <li>• Can clearly articulate the school's mission,</li> <li>• Uses the mission to make decisions, and</li> </ul>

	<p>and</p> <ul style="list-style-type: none"> <li>Establishes a culture of trust between administrators, teachers, parents, and students.</li> </ul>		<ul style="list-style-type: none"> <li>Empowers staff to use the mission as a decision-making tool by setting an example through his or her own decisions.</li> </ul>
Board Capacity	<p>Evaluator feedback will discuss the extent to which board leadership:</p> <ul style="list-style-type: none"> <li>Can clearly articulate a personal stake in ensuring that the school achieve its mission, and</li> <li>Makes decisions based on facts regardless of how decisions might affect relationships with school leaders.</li> </ul>	N/A	<p>Evaluator feedback will discuss the extent to which the board leaders:</p> <ul style="list-style-type: none"> <li>Can clearly articulate the school's mission, and</li> <li>Uses the mission to make critical decisions.</li> </ul>
Financial Plan	N/A	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>Projections are based on accurate, conservative, and legally compliant assumptions,</li> <li>Includes evidence that funds from external sources are guaranteed,</li> <li>Adequately and appropriately funds all essential services,</li> <li>Fund balance in alignment with expectations described on page 12 of the <a href="#">Charter School Performance Compact</a></li> <li>Debt-to-asset ratio is less than 0.9,</li> <li>Financial statements demonstrate a plan for solvency,</li> <li>Cash-flow projections describe an achievable plan to stay liquid at all</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>The budget prioritizes mission-aligned expenses, and</li> <li>The facilities plan articulated in the budget describes a facility with functionality aligned to the school's mission.</li> </ul>

		<p>times, and</p> <ul style="list-style-type: none"> <li>• There are no material findings in the non-profits most recent audited financial statements (if applicable).</li> </ul>	
<b>For Applicants with an Educational Service Provider</b>			
Educational Service Provider Contract	<p>Evaluator feedback will discuss the extent to which board leadership:</p> <ul style="list-style-type: none"> <li>• Maintains independence from the ESP by articulating strong accountability provisions and avoiding opportunities for the ESP to gain leverage over the board.</li> </ul>	<p>Evaluator feedback will discuss the extent to which:</p> <ul style="list-style-type: none"> <li>• The ESP cannot control board membership, and</li> <li>• The contract does not allow for any form of leverage – including but not limited to severance fees and facilities ownership – by which the ESP can ensure renewal of their contract.</li> </ul>	N/A

## New Operator Executive Summary Template

Name of Non-Profit – Draft / Official Recommendation to the Department

Recommendation	
<i>Approve / Deny the application submitted by [Name of Non-Profit].</i>	

Non-Profit Information			
Non-Profit:	<i>Non-Profit Name</i>		
Origin:	<i>Local / National</i>	Experience Level:	<i>New / Experienced</i>

School Information			
School:	<i>School Name</i>	Home District:	<i>District where located</i>
Types:	<i>1, 2, 3, and / or 5</i>	Districts Served / Specific School:	
Model:	<i>Blended, Montessori, etc...</i>	Year Opening:	
Grade Configuration at Start:	<i>Grades</i>	Grade Configuration at Scale:	<i>Grades</i>
Enrollment at Start:	<i>#</i>	Enrollment at Scale:	<i>#</i>

Additional Features of the Application
<ul style="list-style-type: none"> <li>• <i>Ex. 1: Applicant proposes a blended learning school supplemented by comprehensive wrap-around services for students and additional social services for parents and community members.</i></li> <li>• <i>Ex. 2: The applicant is guided by the philosophy that the school must target the first-order effects of poverty – joblessness and hopelessness among the adults in the community.</i></li> </ul>

Strengths of Application
<ul style="list-style-type: none"> <li>• <i>Ex. 1: Applicant states a very clear mission – “The mission of our school is to prepare students for middle school by ensuring that each student has the academic and social skills to contribute to an academically productive and socially healthy middle school.</i></li> <li>• <i>Ex. 2: Applicant’s budget provides detailed, clear assumptions and conservative but realistic projections.</i></li> </ul>

Recommendation Drivers
<ul style="list-style-type: none"> <li>• <i>Address mission alignment across the application</i></li> <li>• <i>Address capacity of school leader and board members</i></li> <li>• <i>Address robustness of the educational model</i></li> <li>• <i>Address concerns about the integrity of the application based on any other plans or capacity</i></li> </ul>

## Experienced Operator Executive Summary Template

Name of Non-Profit – Draft / Official Recommendation to the Department

Recommendation
<i>Approve / Deny the application submitted by [Name of Non-Profit].</i>

Non-Profit Information			
Non-Profit:	<i>Non-Profit Name</i>		
Origin:	<i>Local / National</i>	Experience Level:	<i>New / Experienced</i>

School Information			
School:	<i>School Name</i>	Growth Plan	<i>Number of schools in each year in each district.</i>
Types:	<i>1, 2, 3, and / or 5</i>		
Model:	<i>Blended, Montessori, etc...</i>		
Grade Configuration at Start:	<i>Grades</i>	Grade Configuration at Scale:	<i>Grades</i>
Enrollment at Start:	<i>#</i>	Enrollment at Scale:	<i>#</i>

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