Presentation Outline

- Eligibility
- Applicant Pathways
- Geographic Boundaries
- Parts of the Application
- Instructions & Guidance Document
- Responses & Attachments Document
- Evaluation Process
- Assembling the Application
- Submitting the Application
- Timeline
- Award Process
- Conclusion
INSTITUTIONS OF HIGHER LEARNING

Any public technical institute, public junior college, public senior college or university, medical or dental unit, public state college, or other agency of higher education

TAX EXEMPT ORG. 501(C)(3)

Non-profit organization that has federal income tax exemption under the Internal Revenue Code.

GOVERNMENT ENTITIES

See Texas Government Code 2252.001(2)
Ineligible
WHO CANNOT APPLY?

FAITH BASED ORGANIZATIONS
Organizations motivated by religious faith or affiliated with a religious institution.

RELIGIOUS INSTITUTIONS
Institutions that exist to support and manage the practice of a specific set of religious beliefs.

SECTARIAN GROUPS
Group of individuals or members with a particular set of interests.
Pathways

NEW OPERATORS

EXPERIENCED OPERATORS

SUBCHAPTER E
Sponsoring entities that have never operated a charter school, regardless of individual charter school experience among the Board or proposed leadership.

The vast majority of applicants are new operators,
Sponsoring entities that currently operate a charter school in another state outside of Texas.

This pathway no longer distinguishes between proven and unproven.
SUBCHAPTER E
REDEFINING THE JOURNEY

PUBLIC SENIOR COLLEGE
A general academic teaching institution as defined by Texas Education Code 61.003(3)

PUBLIC UNIVERSITY
A general academic teaching institution as defined by Texas Education Code 61.003(3)

PUBLIC JUNIOR COLLEGE
Any public junior college certified by the Texas Higher Education Coordinating Board.
Geographic Boundaries

ENROLLMENT STRUCTURES

Traditional Independent School Districts define a charter school’s enrollment boundary.

Students that are not residents within those ISD districts are not eligible to attend the charter school.
STAFF’S CHILDREN
"We hired a teacher but they live outside of our boundary. They accepted the position under the presumption that their child can attend. Can we enroll their child?"

YES

CAMPUS LOCATION
"We had a campus location in mind but we found a different location at the edge of our geographic boundary. Can we add more districts to accommodate the change?"

NO

MISSED DISTRICTS
"Our application does not account for district X! We forgot to send them a statement of impact. Can we still add that district to our boundary?"

NO
THE APPLICATION PACKAGE

Parts of the Application

INSTRUCTIONS & GUIDANCE DOCUMENT
RESPONSES & ATTACHMENTS DOCUMENT
CHARTER MANAGEMENT ORGANIZATION
LETTER OF SPECIAL ASSURANCES
Instructions & Guidance Document

REVIEWING, COMPLETING, SUBMITTING

Can't remember something? Look in the Instructions & Guidance about...

TIMELINE
ELIGIBILITY
ASSEMBLY
PRINTING
SUBMISSION
NARRATIVE PROMPTS
EVALUATION AND SCORING
CAPACITY INTERVIEWS
APPROVAL PROCESS
Responses & Attachments Document

ARTICULATING THE PLAN

Application Coversheet
School Overview
School Design
Leadership & Governance
Talent Management & Development
Operational and Financial Plan
Attachments
Do NOT make material changes, alterations, or edits to the Responses & Attachments Document.

Inserting Responses & Attachments
ORIGINAL WORK

The representation of the words or ideas of another as one’s own in an application.

PRIOR APPLICATIONS

Returning applicants must cite their prior applications if the applicant team has substantially changed.

CUTTING AND PASTING

Citations are irrelevant if whole sections of text are cut and pasted into the application.

CITATION FORMAT

No specific format is required; however, citations must include the author, year of publication, and the source of work.

Plagiarism
YOUR PROPOSAL AT A GLANCE

- Contact Information
- Enrollment & Geographic Footprint
- Governance & Leadership
- Applicant Team
- Support Services
"At-Capacity is the maximum number of students that the charter school will enroll during its first five years of operation."

Enrollment & Geographic Footprint

WHAT DOES AT-CAPACITY MEAN?
Applicant Team & Support Services

SUBSTANTIAL ROLES
Applicant team refers to only individuals/entities that make substantial contributions to the application process.

PAID SERVICES
Individuals/Entities that receive payment or in-kind services in connection with the application process.

PROCESS SUPPORT
Individuals/Entities that will shepherd an applicant throughout the application process (application, interviews, start-up etc.).
School Overview Section

Executive Summary
Targeted Community
Anticipated Student Population
Geographic Boundaries
Enrollment Projections
Demographic Projections
Community Engagement
Executive Summary

Proposed Community

Educational Philosophy

Educational philosophy of the applicant team and an explanation of how that philosophy aligns with the school's mission, key design elements, and innovative design.

Board Capacity

Capacity of the proposed board and superintendent to successfully open and operate a high-quality charter school.

Effectiveness

How the model will effectively serve students in the proposed community.

Generation 25 | 2019-2020
Demographic Projections

...FOR CAMPUS ONE

CITE PROJECTED DEMOGRAPHICS FOR:

- African American/Black
- Hispanic
- White
- American Indian/Native
- Asian
- Pacific Islander
- Two or More Races
- Economically Disadvantaged
- English Learners
- At-Risk
- Gifted/Talented
- Special Education
Common Questions from Reviewers/Stakeholders

Why are the projected demographics different than the occupying/contiguous districts?

Why is the Board not representative of the projected demographic?

Has the network demonstrated success with similar demographics throughout their network? [Experienced Operators]
Community Engagement

REQUIRED STEPS

PUBLIC MEETING(S)
Must hold at least one public meeting within the proposed geographic boundary to discuss the application for open-enrollment charter.

NOTIFY ABOUT MEETING
Must notify, by their government email, all members of the SBOE and Texas legislature who represent the geographic area to be served.

Carbon Copy (CC) charterapplication@tea.texas.gov in the CC line.

STATEMENT OF IMPACT
Must send Statements of Impact forms to each Superintendent and President of the Board of Trustees; Texas Legislators, and SBOE members who represent the geographic areas to be served by the charter school.

COMPLETE PROMPTS
Describe how the applicant team has assessed and built parent and community demand for the proposed school.

How parents and community members have played a role in developing the proposed school.
THIS SECTION EXPLORES...

Mission, Vision, and Overview of School Design
Curriculum and Instruction
Strategies for Assessment of Learning and Data-Driven Instruction
Supports for Special Populations
School Culture and Safety
Promotion and Graduation Requirements
Family and Community Engagement
Portfolio Performance [Experienced Operators Only]
Page Structure

NOTES AND DEFINITIONS

RELATED RESOURCES

QUESTIONS/PROMPTS

EVALUATION CRITERIA
Portfolio Management
FOR EXPERIENCED OPERATORS ONLY

CURRENT PORTFOLIO
Establishing the network's presence within/between its operating states.

PERFORMANCE HISTORY
Present performance data to support current high-quality educational services.

LEGAL DISPUTES
Cite current and past legal disputes that involve the charter operator.
BEYOND TARGET POPULATIONS
Legal responsibility for special populations begin with one student, regardless if that student is within the school’s target demographic. A failure to plan (for) and successfully serve all potential students (and their associated educational needs) is not an excuse.

GIFTED & TALENTED
Gifted and talented students are often overlooked in the planning of a charter school. Do not assume that historically under-served communities will not have gifted & talented students.

FINANCIAL PLANNING
Failure to adequately plan to fund special accommodations, staff certifications (and more) is not an excuse. There are serious consequences for the neglect of federal/state laws regarding special populations.

Special Populations
COMMONLY OVERLOOKED ISSUES
Family & Community Engagement

DIFFERENCES BETWEEN...

NEW OPERATORS

Referring to engagement and outreach that will be conducted after the charter is awarded.

EXPERIENCED OPERATORS

Referring to engagement and outreach that have already been conducted at other schools within the network.
Governance & Leadership Section

BOARD STRUCTURE & QUALIFICATIONS
PROPOSED SUPERINTENDENT QUALIFICATIONS
PROPOSED INSTRUCTIONAL LEADERSHIP TEAM
PROPOSED FINANCIAL & OPERATIONS LEADERSHIP TEAM
PERFORMANCE MANAGEMENT
REPRESNTATION

How does the makeup of the Board reflect the community?

QUALIFICATIONS

Do Board members bring qualifications for success, not just a passion to serve students?

STRATEGIC SELECTION

Have Board members been selected to facilitate a specific function or contribution?

COMMUNITY ENGAGEMENT

Is there a clear and consistent plan to engage with stakeholders?

LEADERSHIP SUPPORT

Is there a measurable continuum of meaningful support from Board to Leadership?

EVALUATING PROGRESS

Is there a clear and published plan to evaluate progress of the Board and Leadership?
"The Board cannot simply be a reflection of one person's brain child."
Leadership Teams

FINANCE
- Budget Development
- Financial Management
- Accounting & Internal Controls
- Fundraising & Development

INSTRUCTIONAL
- School Leadership
- Curriculum, Instruction, and Assessment
- Data Driven Decision Making
- Special Populations
- Professional Development
- Performance Management
- Experience & Knowledge of the Target Community
- Parent & Community Engagement

OPERATIONS
- General Operations
- Facilities Acquisition & Management
- Talent Management (Recruitment, Hiring, Staff Management)
- Policy Development & Implementation
- Contract Management
- Student Recruitment & Enrollment
- School Safety
- PEIMS Reporting
Charter schools receive funding that is based on attendance data submitted through PEIMS. Incorrect submissions can either short-change (OR) cause financial recapture from the State.

This is often considered the most important role in the entire school.
Talent Management & Development Section

Talent Management
Professional Development & Evaluation
Retention
Finance & Operations Section

SCHOOL CALENDER & SCHEDULE
STUDENT RECRUITMENT & ENROLLMENT
FACILITY AQUISITION
TRANSPORTATION
START-UP PLAN
FINANCIAL PLANNING
REQUIRED MINUTES FOR FULL-FUNDING

75,600
Facility Acquisition

There are two options

Known (or) Unknown

Complete either Facility [Known] or Facility [Unknown]. Do NOT complete both sections.
<table>
<thead>
<tr>
<th>ENROLLMENT VIABILITY</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will the enrollment projections sustain any facility plans/needs etc?</td>
<td>Does the chosen/desired location provide realistic access to the projected demographic?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>REPAYMENT TERMS</th>
<th>CONTINGENCY PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has the applicant sufficiently outlined the financing plan to pay for the chosen/desired facility?</td>
<td>Does facility acquisition include a realistic contingency plan in the event that the chosen/desired facility falls through?</td>
</tr>
</tbody>
</table>
Charter schools must provide and fund transportation services for any student if their IEP requires it. There are no excuses.
YEAR ZERO
The planning year lasting from September 2020 to August 2021.

No students are served during this time.

The **Prompt Section** is meant for narrative responses.

The **Attachment Section** is meant for a highly detailed start-up plan.
Paid Services

THE DIFFERENCES BETWEEN...

CONTRACTED SERVICES
Referring to services such as, but not limited to:
- Back Office Services
- Food Services
- Transportation
- Janitorial & Grounds

CHARTER MANAGEMENT ORGANIZATIONS
Referring to a person or entity, other than the charter holder, who will manage significant aspects of charter operations.
**Nepotism**

A proposed contracted service provider would violate nepotism laws. They can be innocent mistakes but it can taint the integrity of the proposal.

**Scope of Services**

The scope of services exceeds simple contracted services and should be considered as a charter management organization.

**Over Reliance**

The plan does not offer a convincing contingency plan in the event that a specific CMO or contractor terminates services.
Attachments

**FORMATTING**

**SINGLE SIDED SHEETS**

**STANDARD 8.5 X 11 INCH SIZE SHEETS**

This includes legal documents that were originally printed on legal size paper.

**SINGLE SPACED**
Letter of Determination
The IRS Letter of Determination for 501(c)(3) Status is due no later than May 15, 2020 as Attachment 2.

Registration Form
Submit your stamped registration form from the Application Information Session as Attachment 3.

Mail Receipt/Signature Card(s)
May include either U.S Postal Service Certified Mail Receipt OR Certified Mail (Green) Signature Card as Attachment 5.

Public Meeting Notice
Submit a copy of the Public Notice advertisement as Attachment 6.
DOWNLOAD AND COMPLETE

Must complete and submit as the Excel format provided.

Use the parameters provided in the workbook.

Electronic submissions- submit as separate email attachment.

Paper submissions- only include a printed copy of the tab Financial Plan Workbook Summary.
Evaluation Process

SCORING AND DETERMINATION
TEA does not score applications. That is the job of the external reviewers.
Process Overview

- Completion Check
- External Review
- Additional Review
- Internal Analysis
- Capacity Interview
Independent Review
The Agency provides training to all external reviewers but does not effect their scoring.

Five Reads
Each application is independently reviewed by five randomly assigned reviewers.

Scores are Weighted
Each section (of each review) is weighted and averaged to derive a final cumulative score.

Additional Reviews
Final cumulative scores that are within 80% will receive one additional review. The review counts as a sixth read, not a replacement score.
Weighted Scores

<table>
<thead>
<tr>
<th>Category</th>
<th>Experienced Operators</th>
<th>New Operators</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Overview</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>School Design</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Leadership Governance</td>
<td>30</td>
<td>25</td>
</tr>
<tr>
<td>Talent Management</td>
<td>20</td>
<td>10</td>
</tr>
<tr>
<td>Operations &amp; Finance</td>
<td>15</td>
<td>25</td>
</tr>
<tr>
<td>Internal Coherence</td>
<td>5</td>
<td>5</td>
</tr>
</tbody>
</table>
Priority Points

For Experienced Operators Only

Up to five (5) additional points.

Completely optional.

Must provide sufficient data to support claims on prompts.

Do not provide data without a prompt response.
Assembling the Application
...step by step

Finalize Responses & Attachments Document.

Print loose attachments (bylaws, HR form, Financial Plan Workbook Summary etc).

Adjust Table of Contents to reflect attachment inserts.

Print final Responses & Attachments Document with correct page numbers. Insert loose attachments.

Print CMO [if applicable] and Letter of Special Assurances.

Indicate page numbers on unpaginated inserts.

Scan full document (totally paginated).

Use this scanned copy as the electronic submission.

Print this scanned copy for the hard-copy submission.
Submitting the Application

Applicants must submit BOTH an electronic copy and a hard-copy.
MUST SUBMIT THROUGH SHAREFILE

Use hyperlink that is provided in the Instructions and & Guidance Document - Page 16.

Provide name, email, and sponsoring entity (company).

Drag and drop the Final Application (Pdf) and Financial Plan Workbook (Excel).

The Agency automatically gets notification of when it is uploaded. This is the official time stamp. Applicants may also option to receive a confirmation email.
One Original Copy
Submit an original copy that is hand signed in blue ink.

Five Identical Copies
Submit five (5) additional copies of the final application.

Unbound
Do not bind with clips or other mechanical devices. Applicants may use rubberbands.

No Early Hand Deliveries
Do not hand-deliver applications prior to January 21, 2019. They will not be accepted for consideration.

Postage Deliveries
Courier delivered applications are only measured by the receipt date and not the post-mark date.
HAND DELIVERY

Education Service Center-Region 13
5701 SpringDale Road
Austin TX, 78723

POSTAGE DELIVERY

Texas Education Agency-Division of Charter School Administration
Attention: John Garland
1701 North Congress Avenue
Austin TX, 78701
No representative of an applicant may initiate contact with any TEA staff or State Board of Education member regarding the content of the application from the time the application is submitted until 90 days after the commissioner proposes the Generation Twenty-Five Open-Enrollment charters for award.
The Timeline

Generation 25
RFA is released and Application Information Sessions are conducted

OCT.

JAN.
Generation 25 Applications are due by January 21, 2020 5pm CST.

Completion Checks
Remedy Period.

FEB.
Applications are scored by external reviewers from late February into the middle of May, 2020.

MAY
Deterrmination Letters are sent to applicants.

JUNE
Extra reviews are conducted.
Deterrmination Letters are sent to applicants.

JULY
Capacity Interviews with Agency staff and the State Board of Education during the week of July 27, 2020. A governing board member must attend.
The State Board of Education will vote to take no-action or veto proposed charter schools.

Commissioner of Education proposes charters for awarded.

The Timeline

August 2021: Charter School Opens August 2021
Commissioner of Education deliberates and proposes charter schools.

State Board of Education has statutory authority to veto any proposed charter school within 90 days.

State Board of Education does NOT have statutory authority to resurrect applicants that were removed.
Questions?

OUR CONTACT DETAILS

JOHN GARLAND
Division of Charter School Administration

PHONE NUMBER
512-463-3533

EMAIL ADDRESS
john.garland@tea.texas.gov