# Table of Contents

- Introduction .......................................................................................................................... 5
- Eligibility ................................................................................................................................. 6
- Generation 25 Timeline ......................................................................................................... 7
- Approval and Award Process ................................................................................................. 12
- Application Package ............................................................................................................. 13
- Printing and Submission ......................................................................................................... 16
- Application Response Guidance .......................................................................................... 19
- Applicant Cover Sheet ........................................................................................................... 20
- School Overview .................................................................................................................... 21
  - Executive Summary ............................................................................................................ 21
  - Targeted Community and Anticipated Student Population ............................................ 22
  - Community Engagement .................................................................................................. 24
- School Design ......................................................................................................................... 26
  - Mission, Vision, and Overview of School Design ............................................................. 26
  - Curriculum and Instruction .............................................................................................. 27
  - Strategies for Assessment of Learning and Data-Driven Instruction ................................ 30
  - Supports for Special Populations ....................................................................................... 32
  - School Culture and Safety ................................................................................................. 35
  - Promotion and Graduation Requirements ......................................................................... 38
  - Family and Community Engagement ............................................................................... 40
- Leadership and Governance .................................................................................................... 42
  - Board Structure and Qualifications .................................................................................. 42
  - Proposed Superintendent Qualifications ......................................................................... 45
  - Proposed Instructional Leadership Team ......................................................................... 46
  - Proposed Financial and Operations Leadership Teams ................................................... 49
  - Performance Management ................................................................................................. 52
- Talent Management and Development ................................................................................ 54
  - Talent Management ......................................................................................................... 54
  - Professional Development and Evaluation ....................................................................... 56

Generation 25 Application Instructions & Guidance
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retention</td>
<td>58</td>
</tr>
<tr>
<td>Operational and Financial Plans</td>
<td>59</td>
</tr>
<tr>
<td>School Calendar and Schedule</td>
<td>59</td>
</tr>
<tr>
<td>Student Recruitment and Enrollment</td>
<td>61</td>
</tr>
<tr>
<td>Facility Acquisition</td>
<td>63</td>
</tr>
<tr>
<td>Facility Identified</td>
<td>63</td>
</tr>
<tr>
<td>Facility Not Identified</td>
<td>65</td>
</tr>
<tr>
<td>Transportation</td>
<td>67</td>
</tr>
<tr>
<td>Start-up Plan</td>
<td>69</td>
</tr>
<tr>
<td>Financial planning</td>
<td>71</td>
</tr>
</tbody>
</table>
Introduction

The Texas Education Agency (TEA) welcomes applications for high-quality charter schools seeking to open in August 2021. Applicants are strongly encouraged to read through the Application Instructions & Guidance document and the corresponding Charter Request for Application (RFA 701-19-113) before developing any application content.

The Commissioner of Education (the commissioner) is actively committed to attracting high-quality charter applicants who are capable of operating charter schools that provide innovative, high-quality learning opportunities for all students. The information requested through the application will inform the commissioner’s decision to propose awards for Generation 25 charters in August 2020.

On May 30, 1995, the Texas Legislature created the Public Charter School Program to maintain a portfolio of secular, tuition-free, public charter schools that:
- improve student learning;
- increase the choice of learning opportunities within the public-school system;
- create professional opportunities that attract new teachers to the public-school system;
- establish a new form of accountability for public schools; and
- encourage different and innovative learning methods.

The commissioner has vested authority to award Subchapter D Open-Enrollment charters and Subchapter E College/University charters (Texas Education Code [TEC] §§12.101 and 12.152, respectively). Pursuant to statute, the commissioner must adopt an annual open-enrollment charter application form, procedures, and evaluation criteria to be used in determining whether to award a charter. Collectively, the Charter Request for Application, Application Instructions & Guidance, and Evaluation Criteria documents fulfill this requirement.

During the application process, the eligible entity applying for a charter shall be referred to as the “sponsoring entity” or “applicant” or “charter applicant.” The term “charter holder” is exclusively reserved for applicants who are awarded a charter. The charter holder is the entity to which public education funds are paid, if the application is approved by the commissioner and a contract is signed.

Prior to the submission of an application, TEA staff members are limited to fielding general inquiries that are associated with timelines and the overall application process. TEA staff members may not speak to application content or provide assistance that could shape the proposed model.

The commissioner will give priority to applications that propose to operate an open-enrollment charter school within the boundaries of the attendance zone of a campus assigned an unacceptable performance rating for the past two years, pursuant to TEC §39.054.
Eligibility

Operators of open-enrollment charter schools within the state of Texas must qualify as an *Eligible Entity* as defined in TEC §12.101. The State may grant open-enrollment charters to the following entities:

- an institution of higher education as defined under TEC, §61.003(8);
- a private or independent institution of higher education as defined under TEC §61.003(15);
- an organization that is exempt from taxation under Section 501(c)(3), Internal Revenue Code of 1986 [26 U.S.C.S. Section 501(c)(3)]; or
- a governmental entity.

**NOTE:** The TEA will make determinations on eligibility during the completion check process. Applications that are deemed to be ineligible will be removed from any further consideration during the Generation 25 application cycle.

Churches and other faith-based organizations exempt from taxation under Section 501(c)(3) of the Internal Revenue Code are not considered eligible entities.

The commissioner may not award a charter to an entity that has, within the preceding 10 years, had a charter revoked, non-renewed, or surrendered. The commissioner will not consider an application submitted by an individual that is substantially related to an entity that, within the preceding 10 years, had a charter that was revoked, non-renewed, returned or surrendered its charter under a settlement agreement.
Generation 25 Timeline

Key dates from the Generation 25 application timeline are highlighted in the table below. More detail about the application process is provided in the sections that follow the table.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Application published</td>
<td>October 4, 2019</td>
</tr>
<tr>
<td>Information session #1</td>
<td>October 18, 2019</td>
</tr>
<tr>
<td>Information session #2</td>
<td>November 1, 2019</td>
</tr>
<tr>
<td><strong>Application submission deadline</strong></td>
<td><strong>January 21, 2020</strong></td>
</tr>
<tr>
<td>Completion check</td>
<td>January 21 – February 11, 2020</td>
</tr>
<tr>
<td>Remedy period</td>
<td>February 11-18, 2020</td>
</tr>
<tr>
<td><em>Determination Notifications sent to applicants:</em></td>
<td><em>Determination of advancement to external review</em></td>
</tr>
<tr>
<td><em>Determination Notifications sent to applicants:</em></td>
<td><em>Determination of advancement to capacity interview</em></td>
</tr>
<tr>
<td>External review of complete applications</td>
<td>February 28 – May 15, 2020</td>
</tr>
<tr>
<td>Additional read window (automatic)</td>
<td>May 20 – June 3, 2020</td>
</tr>
<tr>
<td><em>Capacity interviews with representatives from the Texas Education Agency and the State Board of Education</em></td>
<td><em>Week of July 27, 2020</em></td>
</tr>
<tr>
<td>Commissioner proposes awards</td>
<td>August 17, 2020</td>
</tr>
<tr>
<td>State Board of Education meeting</td>
<td>September 8-11, 2020</td>
</tr>
</tbody>
</table>

Key Dates for Applicants

REQUEST FOR APPLICATION (RFA) PUBLISHED... October 4, 2019
Notification of the RFA publication is posted in the Texas Register, on the TEA Charter School Division website, and subscribers are notified via the TEA GovDelivery System.

APPLICANT INFORMATION SESSIONS ... October 18, 2019 and November 1, 2019
Two information sessions will be held at Education Service Center Region 13, which is located at 5701 Springdale Road, Austin, Texas 78723. The October 18th session will be held in the room called State Capitol and the November 1st session will be held in the room called Treaty Oak. These sessions are held to provide additional information to applicants about procedures and general considerations for the application process. Please note that at least one governing board member is required to attend one of the information sessions for an application to be deemed complete. Applicants must submit, as part of the Application Package, an Applicant Information

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1 The Applicant Information Sessions and Application Submission has been relocated for the Generation 25 application cycle due to ongoing construction near the William B. Travis building.

Generation 25 Application Instructions & Guidance
Session Registration Form signed by the participating board member and TEA staff as proof of attendance.

APPLICATION SUBMISSION DEADLINE… January 21, 2020
Applications must be submitted electronically AND in hard copy by 5:00 p.m. Central Standard Time. Hard copies must be delivered to Education Service Center Region 13, which is located at 5701 Springdale Road in Austin.

NOTE: NO CONTACT PERIOD
Applicants may contact TEA staff for clarifications regarding required fields in the application, and for assembly procedures; however, an applicant must not initiate contact with any TEA staff or SBOE member regarding the content of the application from the time the application is submitted until 90 days after the commissioner proposes the Generation 25 open-enrollment charter(s) for award.

Applications that are removed from consideration (for lack of eligibility, lack of completion, failure to make the required cut score, plagiarism etc.) are still subject to the no-contact provision.

Evaluation Process
An overview of the charter application review process is provided below.

COMPLETION CHECK… January 21 – February 11, 2020
TEA staff members conduct the initial application review, checking for statutory eligibility, completeness, and plagiarism violations. Applications that pass the completion check will proceed to the external review stage.

NOTE: Any application found to contain plagiarized content shall be removed from the application process and will be excluded from further review during the Generation 25 application cycle.

For an application to be deemed complete, applicants must:

- Submit a completed Application Package electronically by the application deadline;
- Ensure that the TEA receives one original and five hard copies (six total) of the Application Package by the application deadline;
- Address all required questions and attachments in the Application Instructions & Guidance and related documents;
- Not include prohibited materials pursuant to the Public Disclosure Policy;
- Prepare the Application Package in compliance with all instructions provided; and
- Ensure completeness in both form and assembly.
EXTERNAL REVIEW PERIOD… February 28 – May 15, 2020

All eligible applications that have successfully passed the completion check are assigned to five independent parties for external review and scoring. Each application will be reviewed on its own merits and scored in accordance with the Evaluation Criteria published by the TEA.

Evaluation criteria appear at the end of each application section in this document. External reviewers will score every criterion. Those scores will be totaled within each section of the application (summarized in the table below) and divided by the total number of points possible in that section. Then, that score (indicated as “X” in the table below) will be multiplied by the weight for that section to arrive at the weighted score (indicated as “Y” in the table below). In addition, five percent of the total score evaluates the internal coherence of the document and the extent to which all of the sections are consistent and collectively propose a comprehensive plan that will lead to a successful school. The average of all five reviews must be equal to or greater than 85% for the applicant to advance to the capacity interview.

<table>
<thead>
<tr>
<th>Section</th>
<th>Score</th>
<th>Weight</th>
<th>Weighted score</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Overview</td>
<td>X</td>
<td>10%</td>
<td>Y</td>
</tr>
<tr>
<td>School Design</td>
<td>X</td>
<td>25%</td>
<td>Y</td>
</tr>
<tr>
<td>Leadership and Governance</td>
<td>X</td>
<td>25%</td>
<td>Y</td>
</tr>
<tr>
<td>Talent Management</td>
<td>X</td>
<td>10%</td>
<td>Y</td>
</tr>
<tr>
<td>Operations and Finance</td>
<td>X</td>
<td>25%</td>
<td>Y</td>
</tr>
<tr>
<td>Internal Coherence</td>
<td>X</td>
<td>5%</td>
<td>Y</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>100%</td>
<td>Total</td>
</tr>
</tbody>
</table>

NOTE: If not included in the application submitted on January 21, 2020, TEA staff must receive Attachment 2, the 501(c)(3) IRS Determination Letter no later than 5pm CST on Friday, May 15, 2020. Failure to submit the determination letter in a timely manner will result in the application’s removal from the application process without the opportunity to participate in a capacity interview.

ADDITIONAL REVIEW PERIOD … May 20 – June 3, 2020

Applicants that fall within five percentage points of the 85% threshold to advance (i.e., between 80 and 84.9%) will receive one additional external review during the additional review period. If the final adjusted score (incorporating the score from the sixth review) exceeds 85%, the application will advance to the capacity interview stage.

CAPACITY INTERVIEWS… July 27-31, 2020

Qualifying applicants (i.e., those meeting the 85% threshold to advance) are invited to participate in a formal in-person interview with TEA staff and State Board of Education (SBOE) members. During the interview, applicants will have the opportunity to field questions and demonstrate their capacity to open and operate a high-quality charter school.

NOTE: Interview days and times are provided by TEA staff and are not subject to negotiation. As such, applicants should reserve the week of July 27, 2020 for a potential interview.
NOTE: All applicants that hold 501(c)(3) Nonprofit Corporation status MUST have both: (1) the president of the governing board of the sponsoring entity; and (2) the superintendent (if identified) in attendance at the capacity interview. Applicants that qualify as Institutions of Higher Education MUST have: (1) at least one member who currently holds a position on the governing board of the institution of higher education/governmental entity; and (2) the superintendent (if identified) of the proposed charter school in attendance at the capacity interview.

CHARTER AWARDS PROPOSED… August 17, 2020
The commissioner reviews all relevant application information and proposes awards. In order to be proposed for award, an applicant must attain a score of 85% or better on the application AND demonstrate sufficient capability during the capacity interview.

SBOE ACTION ON CHARTERS PROPOSED… September 8-11, 2020
The SBOE may veto any charter proposed within 90 days of the commissioner’s proposal. Charter applicants proposed for award are required to attend the September 2020 Friday meeting of the full SBOE Board in Austin, Texas. Charter applicants may also be invited to attend the September 2020 Thursday meeting of the SBOE Committee on School Initiatives.

Charters will be awarded if the SBOE does not veto the commissioner’s proposed awards. All determinations of the commissioner related to charter awards are final and carry no right of appeal. Applicants that are not awarded a charter during the Generation 25 cycle are welcome to reapply during future application cycles.

CONTINGENCY PERIOD… September 11 – October 12, 2020
Following SBOE’s action (or inaction) on the commissioner’s proposed charter awards, the proposed charter applicants must work with TEA staff to resolve any issues that were identified during the application review or capacity interview process. All contingencies must be satisfactorily addressed by October 12, 2020. A charter will not be awarded—and a contract will not be drafted—unless all issues are resolved by this date. After all contingencies are addressed, contracts will be issued and county-district numbers will be assigned.
OPEN-ENROLLMENT CHARTER SCHOOL CONTRACT

A contract for an open-enrollment charter school between the charter holder and the commissioner of education must incorporate the following:

- all applicable state and federal laws, rules, and regulations;
- the RFA issued by the TEA and the charter holder’s completed application (response) to RFA 701-19-113;
- any condition, amendment, modification, revision, or other change to the charter adopted or ratified by the commissioner; and
- all statements, assurances, commitments, and representations (written or oral) made by the charter holder within the totality of the submitted charter application and subsequent interview.

The execution of a contract constitutes an assurance by the charter applicant that no false information was submitted to the TEA or the commissioner by the charter applicant, its agents, or its employees in support of its application for an open-enrollment charter. Any action(s) that are inconsistent with the terms and requirements of the charter shall constitute a material violation of the charter contract.

The initial term of the charter shall be five (5) years. After a contract is executed, the receipt of funding is conditioned on the following:

- TEA must issue a county-district number (CDN) and
- the charter holder must execute a depository contract with a bank that:
  - meets the requirements in TEC §45.201;
  - uses the EIN/FEI assigned by the IRS to the charter holder;
  - holds an account in the name of the charter holder; and
  - the charter holder must file a copy of the depository contract with TEA’s Division of Financial Compliance.

The commissioner will periodically evaluate each open-enrollment charter school. The commissioner may revise, revoke, modify the governance of, or deny renewal of the charter if the commissioner determines that the charter holder has failed to satisfy any of the student, financial, compliance, and/or health and safety performance standards set out in 19 Texas Administrative Code (TAC) §§100.1021-100.1035. The procedures for commissioner action and intervention are outlined in TEC §12.116 and 19 TAC §§100.1021-100.1035. In addition to the adverse actions described above, a charter school is also subject to the sanctions and interventions authorized by TEC Chapters 39 and 39A.
Approval and Award Process

CRITERIA

At the conclusion of all applicant interviews, the commissioner will formally propose awards for open-enrollment charters to applicants who have demonstrated the capacity to open and operate high-quality charter schools.

In addition to the overall quality, completeness of the Application Package, and presentation during the interview, the commissioner will consider demonstrations of the following:

- indicators that will improve student performance;
- displays of innovative thought and practice;
- recruitment and retention strategies, no later than the beginning of the third year of operation, that will achieve:
  - a minimum of 50% of enrolled students in at least one grade that is tested for state accountability purposes (i.e., grades 3 through 11); or
  - at least 50% of students have been enrolled in the school for three sequential years;
- impact statements from any school district whose enrollment is likely to be affected by the proposed charter school, including information relating to any financial difficulty that a loss in enrollment may have on a district;
- evidence of parental and community support for the proposed charter school;
- qualifications and backgrounds of all individuals who will be involved in the management and educational leadership of the proposed charter school;
- history of the charter applicant of the proposed charter school, if applicable;
- evidence that the proposed governance structure will establish and maintain sound fiscal management and administrative practices;
- strength of the proposed financial plan;
- plans to ensure services will begin on the date proposed in the application; and
- indications that the proposed charter school will expand the variety of charter schools in the following ways:
  - types of innovative programs,
  - instructional settings,
  - diverse student populations and programs,
  - diverse geographic regions,
  - representation in urban, suburban, and rural communities, and
  - types of eligible entities.
Application Package

APPLICANT PATHS

Generation 25 Subchapter D applicants may submit either an application to be a new operator or complete the application for existing operators.

Most applicants will fall into the new operator category. New operators are applicants who have not previously been awarded a charter or operated an open-enrollment charter school in Texas.

This document outlines the requirements for new operators.

APPLICATION PACKAGE COMPONENTS

Application and Attachments

New operators must complete and submit the following:

• Application checklist;
• Application response for new operators
  - Refer to the Application Instructions & Guidance document for information related to each section, including: questions that must be answered in the narrative; notes and definitions; legal citations; related resources; and the evaluation criteria;
• All required attachments; and
• Letter of Special Assurances. The board chair of the charter applicant must initial all assurances. **Failure to provide all assurances will render the application incomplete.**

Charter Management Organization Addendum

All applications that propose, budget, or reference the employed service of a Charter Management Organization (CMO) must submit a completed CMO addendum. For the purposes of this application, a CMO constitutes any third-party entity, whether non-profit or for-profit, that provides comprehensive and contractual education management services to educational providers. The addendum can be accessed on the Subchapter D Application Page.

Applicants must complete the narrative response boxes provided for each section. Once completed, all associated addendum pages should contain lower center pagination [digital or hand-written forms are both acceptable]. The page numbers should follow the paging order as carried over from the attachment section. *Ex. Attachment Section pg. 30-130, Addendum Section 131-140.*
APPLICATION PACKAGE REQUIREMENTS

Application submission requirements

- Limit the proposal narrative to **100 pages** (not including the executive summary, attachments, or the assurances).
- Use the Application Response Document to draft the response. Refer to the Application Instructions & Guidance documents for the prompts that guide the response and for relevant information about each section.
- Use Times New Roman 12-point font and one-inch margins on all sides.
- Use the headings provided in the Application response document for each section.
- The name of the proposed charter school and the page number must appear in the footer on every page of the application.
- Number every page of the application, beginning with the application checklist.
- Neither printed nor electronic versions of applications may have watermarks.

Application Package components

- To confirm that the application has been reviewed for completeness before submission, the Application Checklist (included in the Application response) must be included in the Application Package.
- There are no page limits for the attachments section.
- Include all applicable attachments referenced throughout the Application Instructions & Guidance document. Attachments are noted in bold text.
- Submit only the attachments that are referenced in the Application Instructions & Guidance document. Additional material beyond the narrative and attachments referenced in the application will not be evaluated.
- Specific directions for each attachment appear on its respective Attachment Coversheet (within the Application response document).
- Completed attachments must be placed behind each attachment’s corresponding coversheet and should contain lower center pagination [digital or hand-written forms are both acceptable]. The page numbers should continue over from the application narrative.
- Note that some attachments must be completed using the templates referenced on the Attachment Coversheet.

Disclosure

Where requested in this application, and to the extent permitted by law, all applicants must provide full and complete disclosure. Applications found to omit any required disclosure, in-full or in-part, will be removed from the application cycle with no further review. This decision cannot be appealed.

Plagiarism

The TEA defines plagiarism as the representation of the words or ideas of another as one’s own in an application. The TEA is cognizant that to discuss an existing curriculum, instructional framework, or educational model with fidelity (e.g. Montessori, arts integration, project-based learning, blended learning, etc.), key concepts must be discussed. However, it is not acceptable to copy and paste a description from another source. An applicant team with the capacity to execute a plan must be able to thoughtfully explain how they intend to educate children in their own
words. To avoid plagiarism, every direct quotation must be identified by quotation marks or by appropriate indentation, and must be cited properly. Acknowledgement is also required when material from any source is paraphrased or summarized in whole or in part.

If, at any time during the evaluation process, TEA staff find that an application contains plagiarized content, it will be removed from the application process and excluded from further review during the Generation 25 application cycle. This decision cannot be appealed.
Printing and Submission

PRINTING AND ASSEMBLY
The Application Package must be assembled in the order outlined on the applicant checklist. All documents must be printed on single-sided, standard 8½ x 11 white paper.

Notes on Assembly
✓ Ensure that all documents have been correctly ordered and that page numbers appear on every page of the completed Application Package.
✓ Ensure that signatures (or initials), where required, are completed using blue ink.
✓ Scan the completed stack of documents as a PDF and save the document as the name of the proposed charter school.

SUBMISSION
Applicants are required to submit BOTH an electronic copy AND six hard copies of the completed Application Package (one original and five hard copies), which includes all of the components outlined on the applicant checklist.

NOTE: An overview and demonstration of the submission process will be conducted during the required Applicant Information Session.

Electronic Submission
Charter application files are generally too large to send from standard email service providers. For this reason, applicants are requested to submit the charter application via Sharefile. This service is a web-based interface that allows for the sharing of large files in a secure environment.

- Click HERE
- The first screen will require the following:
  - Email- use the email that was provided for the applicant’s main contact;
  - First/Last Name- use the main contact that was listed in the applicant’s proposal;
  - Company- use the name of the sponsoring entity
- The submission should include TWO attachments. The first attachment will be the completed application package that was saved as a pdf [include- application response, all attachments, addendum (if applicable), and letter of special assurances. The second attachment will be the completed Excel version of the Financial Plan Workbook [attachment 31].
- Click the upload button in the lower left corner.

2 URL link is https://tea.sharefile.com/r-r1ec1947e82e4d3d9
• Once the submission has been made, the application is considered electronically delivered and final. Applicants will not be able to make additional submissions or revisions to the original application unless contacted by the TEA and directed to do so.
• All submissions have timestamps and will constitute the official date and time of submission. File size and transmission issues could cause severe delays between the sending and receipt of the application package. For this reason, the time stamp included in the submission email (received by the Division of Charter School Administration) will be considered the official date and time of submission.

**Hard Copy Submission**

Applicants must submit six copies of the application:
1. ONE original hard copy of the completed application (with all signatures and initials in blue ink); and
2. FIVE identical photocopies.

**DO NOT BIND THE ORIGINAL OR COPIED DOCUMENTS.** Rubber band(s) are acceptable.

Hard-copy submissions must be received by the TEA Division of Charter School Administration by 5:00 p.m. CST on **Tuesday, January 21, 2020**.

**HAND DELIVERY:** On January 21, 2020, submissions may be hand delivered in person to the following address:

Education Service Center Region 13  
5701 Springdale Road  
Austin, TX 78723

Due to construction in the capital complex, early hand delivery of submissions will not be accepted on any other date.

**CARRIER DELIVERY:** Submissions may be sent via U.S. Mail or via other carrier to the following address:

Texas Education Agency  
Division of Charter School Administration  
Attention: John Garland  
1701 North Congress Avenue  
Austin, TX 78701
NOTES:

- TEA will **not** accept a USPS postmark and/or round validation, stamp, mail receipt with the date of mailing stamped by the USPS, a dated shipping label, invoice or receipts from a commercial carrier, or any other external documentation as proof of receipt of an application.
- TEA unconditionally assumes no responsibility for the receipt of an application after the time-of-receipt deadline and date established in the document.
- Applications that are mistakenly delivered to another department at TEA will not be considered as having been received by the Division of Charter School Administration.
- Applications or portions of applications received after the deadline will not be considered, regardless of when they were posted/shipped.
- All costs incurred in the preparation and submission of applications are the responsibility of the applicant.
Application Response Guidance
Applicant Cover Sheet

Complete the Applicant Cover Sheet in the Generation 25 Application Response document.

Also complete associated attachments, including:

Attachment 1 - Articles of Incorporation;
Attachment 2 - 501(c)3 Determination Letter; and
Attachment 3 - Applicant Information Session.

If a third-party service provider (CMO) will manage the educational program and operations of the proposed school, complete the CMO Addendum, which can be found on the Subchapter D Application Page.
School Overview

Executive Summary

In no more than two pages, provide a descriptive summary of the key features of the proposed plan for the school that covers the following:

- Proposed community;
- 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;
- Capacity of the proposed board and superintendent to successfully open and operate a high-quality charter school; and an
- Explanation of how the model will effectively serve students in the proposed community.
Targeted Community and Anticipated Student Population

Notes and definitions

- The term Occupied District refers to the traditional school district in which the first proposed charter campus will be located. Districts 2 and 3 must be contiguous to the school district in which the first proposed charter campus will be located.
- All cited academic performance data, at the time of submission, must be limited to data sources and reports approved or generated by the Texas Education Agency.
- Student demographic data can be found by school district on the TEA Texas Academic Performance Reports website.
- One additional point will be provided to the applicant if the location of the proposed charter school campus falls within the boundaries of the attendance zone of a campus assigned an unacceptable performance rating for the past two years.

Legal citations

- TEC §12.110(e): Priority for proposed schools located in the attendance zone of a campus assigned an unacceptable performance rating for the past two years.
- TEC §12.111(a)(13): Describe geographic area proposed schools will serve.

Prompts


3. How many campuses are proposed? Describe the rationale. If requesting more than one campus, describe the process used to determine the number of campuses requested. If proposing only one campus, explain why.

4. Describe the rationale for the estimated student enrollment in each grade level served in Year 1 and the basis for the growth plan outlined in the Enrollment Summary Table.


6. Provide a rationale for selecting the proposed geographic location. Describe the anticipated student population, students’ anticipated educational needs, and non-academic challenges the school is likely to encounter.

7. Explain why this approach will serve the targeted population more effectively than existing schools within the proposed geographic boundary.
8. Where demographic projections deviate significantly from the surrounding districts, explain the proposed demographic assumption(s).

**Evaluation criteria**

| ✓ Provide a compelling rationale for the geographic location selected that references the applicant’s ability to serve the community in that location and describes the applicant’s current connections to the community. |
| ✓ Explain how the proposed model will provide students and families with an innovative, high-quality option that is not currently available within the proposed geographic boundaries. |
| ✓ List a proposed location within the boundaries of the attendance zone of a campus assigned an unacceptable performance rating for the past two years (FOR ONE PRIORITY POINT). |
| ✓ Offer realistic attendance boundaries. |
| ✓ Demonstrate an understanding of the student population in the proposed community, including realistic demographic projections and a description of the needs of students in that community. If demographic projections deviate significantly from the surrounding districts, a compelling rationale for the proposed projection must be provided. |
| ✓ Explain the rationale for the proposed enrollment projection in Year 1 and the basis for the proposed growth plan. Enrollment projections for the first year of operation must be realistic. |
| ✓ Enrollment projections are congruent with the financial workbook. |
| ✓ Provide a clear rationale for the number of campuses requested. |
Community Engagement

Notes and definitions

- Review the specific requirements for each attachment in this section on the application response.
- Applicants must prepare a Meeting Agenda and a Meeting Question Protocol for all public meetings. A question protocol is a document, script, or outline of topics, questions, and/or solicited community input that will be explored in each meeting. An applicant should carefully consider specific area(s) of stakeholder input that will help inform the development of the proposal. Applicants must also notify, via their government email, all members of the Texas State Board of Education (SBOE) and the Texas state legislature who represent the geographic area to be served by the proposed school. See Attachment 6 published notice of public meetings for more information.
- Applicants must send out Statements of Impact to the superintendent and board president of each school district located within the proposed geographic boundaries for the school. Submitting a Statement of Impact is the formal opportunity for boards of trustees and/or superintendents of school districts to document any adverse impact the proposed school might have. While applicants are required to distribute these documents according to the instructions provided by the TEA (and to document the distribution appropriately) they are not responsible for ensuring that superintendents return the Statement of Impact forms to the TEA. The TEA will take any applicable Statement of Impact under consideration in its evaluation of each application.

Legal citations

- TEC §12.1101: Notification of charter application or establishment of campus

Prompts

1. Describe how the applicant team has assessed and built parent and community demand for the proposed school. Discuss specific outreach strategies that were and will be used. Include:
   a. Board member input related to community engagement;
   b. Selection process/rationale for all strategies used for community outreach/advertisement; and
   c. Considerations for any barriers to engagement for parents and families.
   Include as Attachment 4 evidence of community demand for the proposed school.

2. Explain how parents and community members have played a role in developing the proposed school.

3. Identify any individual(s) or organization(s) that are partners in planning and establishing the school, along with a brief description of their current and planned role and any resources they have contributed or plan to contribute to the school’s development.
4. Describe any communication to date about the proposed school with Texas State Board of Education (SBOE) members, school district leaders, and/or members of the Texas legislature. Include as Attachment 5, evidence that the applicant team has notified, via certified mail, members of the SBOE and the Texas state legislature who represent the geographic area to be served by the proposed school and the superintendent and board president from each school district located within the school’s proposed geographic boundaries.

5. List and describe all public meetings held to date to discuss the proposed charter school. Include as Attachment 6, evidence of a published notice of at least one public meeting. Explain any strategies that increased attendance at the meeting(s) or factors that contributed to lower attendance rates. Include:
   a. Date and location of each meeting;
   b. The number of attendees at each meeting, including a count of those residing within five, ten, and twenty or more miles of the meeting location;
   c. Outreach efforts to promote each meeting; and
   d. Board member(s) in attendance at each meeting.

Attachments

- 4: Evidence of Community Demand
- 5: Certified Mail Receipt Cards
- 6: Published Notice(s) of Public Meetings

Evaluation criteria

A strong response will:

- Provide evidence of meaningful support from community members and parents of potential students. Describe their role in developing the proposed school.
- Present a clear rationale for all outreach strategies that were employed.
- Demonstrate significant board involvement with the planning and implementation of outreach activities.
School Design

Mission, Vision, and Overview of School Design

Notes and definitions

- This section should articulate the school’s mission, provide a concise summary of the key design elements, and make a compelling case to explain how the model will effectively serve the targeted population in the proposed community.
- The mission is a statement of the fundamental purpose of the school.
- The vision statement describes what the school will achieve over the long term.
- Key design elements are essential components of the school’s overall design that are innovative or unique, directly linked to the school’s mission, and/or are critical to the school’s success.
- The mission, vision, and key design elements should be infused throughout the entire proposal.

Related resources for more information

- Learn more about TEA’s Effective Schools Framework, particularly lever 3, essential action 1.

Prompts

1. State the mission and vision of the proposed school.

2. Describe the process by which the mission and vision were established. Identify the key stakeholders who contributed to the development of the school’s mission and vision.

3. Provide an overview of the proposed model that includes a concise description of the key design elements. Explain what will differentiate this school from existing public-school options.

Evaluation criteria

A strong response will:

- Articulate the mission and vision clearly and concisely.
- Describe how stakeholders, particularly board members, have been engaged—and will continue to be engaged—in creating and iteratively refining the school’s mission, vision, and values.
- Outline the key design elements of the proposed model.
- Make a compelling case to explain how the proposed model will provide a high-quality option, which does not currently exist, and that will effectively serve students in the proposed community.
Curriculum and Instruction

Legal citations
- TEC §12.111(a)(1): Required curriculum must be offered in charter schools.
- TEC §28.002: Required curriculum
- 19 TAC §74: Curriculum requirements

Related resources for more information
- Learn more about state standards, including the Texas Essential Knowledge and Skills and Texas English Language Proficiency Standards (ELPS).
- Review requirements associated with House Bill 3, including: implementation of a K-3 phonics curriculum; attendance at literacy achievement academies; and required full-day pre-K for all eligible 4-year olds (if pre-K is offered).
- View resources related to required curriculum and curriculum programs on TEA’s Curriculum Division website.
- Learn more about TEA’s Effective Schools Framework, particularly:
  - Lever 3, essential action 3
  - Lever 4, essential action 1
  - Lever 5, essential actions 1-2

Prompts

1. Provide an overview of the planned curriculum, including the courses to be offered at each grade level, learning goals for each course, and expectations for student success. Explain how students will develop critical thinking skills across the curriculum. Address the following topics in your response:
   a. Describe how the proposed curriculum will align with the Texas Essential Knowledge and Skills (TEKS) standards (including the ELPS). Provide, as Attachment 7, a sample scope and sequence for one course in an assessed core content area that will be taught during the school’s first year.
   b. Explain how the curriculum will be differentiated for English learners (Els), students with disabilities, and other student groups.
   c. Describe the instructional materials that will be used (e.g., textbooks, novels, online programs, etc.) for each subject and the rationale for the selections. Explain why these instructional materials will be appropriate and effective for the targeted student population.

2. Explain what high-quality instruction will look like at the proposed school. What classroom routines and instructional strategies will teachers be expected to use? Explain why these strategies will be effective for the anticipated student population. How will teachers differentiate instruction to meet the needs of English learners, students with disabilities, and other student groups?
3. Describe how the proposed school will incorporate social and emotional learning into its model (if applicable), including a discussion of programs or strategies that will address students’ mental, emotional, and social development.

4. Outline how board members or school leaders plan to evaluate the proposed curriculum and instructional strategies to determine if the educational program is effective. Explain how these leaders will decide if the curriculum should be updated. If updates are required, describe the process that will be used to modify the curriculum and instructional strategies over time.

**Attachments**

- 7: Sample Course Scope and Sequence
Evaluation criteria

A strong response will:

✓ Present a framework for a rigorous, comprehensive, quality curriculum that is aligned to the *Texas Essential Knowledge and Skills* (TEKS) standards, aligned horizontally, (across content areas within a grade level), and aligned vertically (across grade levels for core content area). Include courses to be offered at each grade level, learning goals for each course, and expectations for student success.

✓ Explain how the curriculum will be differentiated for English learners, students with disabilities, and other student groups.

✓ Detail the specific instructional materials that will be used to implement the school’s proposed curriculum with fidelity. Provide evidence that these resources will be appropriate and effective for the targeted students.

✓ Present a fully developed sample course scope and sequence that is aligned with the TEKS and includes learning goals, assessments, instructional materials, units that will be covered in sequence, the time allotted to each unit, and differentiation strategies.

✓ Outline sound instructional methods that will be used to deliver the curriculum and explain why they are well suited for the targeted student population. Describe how teachers will use classroom routines and instructional strategies to maximize instructional time, provide rigorous high-quality learning experiences, promote critical thinking, and effectively differentiate instruction to meet the needs of all students, including English learners, students with disabilities, and other student groups.

✓ Describe how the proposed school will incorporate social and emotional learning into its model (if applicable) to facilitate students’ mental, emotional, and social development.

✓ Outline a robust process to continuously develop, improve, and refine the curriculum. Explain how the school will evaluate the effectiveness of the proposed curriculum and instructional strategies and make changes to iteratively improve the school’s curriculum and instruction.

✓ Reflect any program costs related to the curriculum and instructional materials in the financial workbook.
Strategies for Assessment of Learning and Data-Driven Instruction

Notes and definitions

- Charter schools must enroll and serve students in at least one state-tested grade level by the beginning of the third year of operation, so that the charter school receives an accountability rating at the end of its third year. Also, the charter school must enroll and serve at least fifty (50) percent of its students in a state-tested grade level by the beginning of the fifth year of operation.
- As of June 19, 2017, specific Early Childhood Education progress monitoring tools have been approved for the period from 2017-2021. Learn more about the Commissioner's List of Approved Prekindergarten Progress Monitoring Instruments.

Legal citations

- Read more about the laws and regulations related to Texas assessments.
- 19 TAC §100.1015(b)(3)(G): Charter schools must serve at least fifty (50) percent of their students in a state-tested grade level by the fifth year of operation.

Related resources for more information

- View resources related to a variety of Texas assessments on TEA’s Student Assessment Division website, including the State of Texas Assessments of Academic Readiness (STAAR) and the Texas English Language Proficiency Assessment System (TELPAS).
- Learn more about TEA’s Effective Schools Framework, particularly:
  - Lever 4, essential action 1
  - Lever 5, essential actions 3-4

Prompts

1. Explain how the school will measure and evaluate students’ academic progress. Address the following topics in the response:
   a. List the TEA-required assessments that will be administered.
   b. Identify other summative and formative assessments the school will use to assess student progress and achievement throughout the year.
   c. Provide the assessment schedule for all major formative and summative assessments.
   d. Explain how these assessments align with the school’s curriculum, performance goals, and Texas state standards (TEKS).

2. Describe how data related to student’s academic progress will be collected and analyzed. Explain how school leaders and teachers will use this data to inform instruction and improve student learning.

3. Explain how the school will identify and meet the learning needs of students who are performing below grade level. Specify the programs, strategies, and supports the school
will provide for these students, how student progress will be monitored, and what additional steps will be taken if the selected interventions were not successful.

**Evaluation criteria**

<table>
<thead>
<tr>
<th>A strong response will:</th>
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<tbody>
<tr>
<td>✓ Identify valid, reliable, grade-level appropriate assessments (including baseline, formative, interim, and summative assessments) the school will use to measure and evaluate students’ academic progress.</td>
</tr>
<tr>
<td>✓ Provide a clear rationale for the selection of these assessments, including how they are aligned with state standards and the school’s mission, educational program, and performance goals.</td>
</tr>
<tr>
<td>✓ Detail specific assessment schedules for administration of the selected assessments.</td>
</tr>
<tr>
<td>✓ Describe how the school will collect, analyze, and utilize data from these assessments to refine and improve instruction.</td>
</tr>
<tr>
<td>✓ Outline procedures for taking corrective action if student performance falls below described goals, how student progress will be monitored, and what additional steps will be taken if the selected interventions were not successful.</td>
</tr>
<tr>
<td>✓ Reflect any program costs related to the assessment program in the financial workbook.</td>
</tr>
</tbody>
</table>
Supports for Special Populations

Notes and definitions
The TEA expects all applicants to demonstrate that they have knowledge and capacity to serve all students well. This includes having specialized expertise in effectively serving English learners, students with disabilities, and other student groups. Evidence of the applicant’s knowledge and capacity should be integrated throughout the application.

The purpose of this “supports for special populations” section is to outline district-level structures and processes related to identifying students for special programs, developing a range of programs that will meet students’ needs, monitoring students’ progress over time, and evaluating the success of those programs. However, the needs of these students must also be explicitly addressed in sections of the application related to curriculum and instruction, assessment, family engagement, talent management, and financial planning, among others. It may be appropriate to briefly describe a program in this section and refer to a more detailed description in another section of the application.

Legal citations
- TEC Chapter 29: Including Subchapter A (special education programs), Subchapter B (bilingual and special language programs), and Subchapter D (educational programs for gifted and talented students)
- Key federal statutes include:
  - Title VI of the Civil Rights Act of 1964 and Title IX of the Education Amendments of 1972, which prohibit discrimination on the basis of race, color, sex, and national origin.
  - Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act of 1990, which prohibit discrimination on the basis of disability.
  - Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974 (EEOA), which collectively require that all public schools ensure English learners can participate meaningfully and equally in educational programs.
  - The Individuals with Disabilities Education Act (IDEA), which requires that all children with disabilities who need special education and related services are identified, located, and evaluated (Child Find). Once identified, those students must be provided with a free appropriate public education (FAPE) that meets their unique needs in the least restrictive environment (LRE).

Related resources for more information
- View TEA’s Bilingual Education and English as a Second Language website and resources related to program implementation.
- View the English learner tool kit published by the National Clearinghouse for English Language Acquisition (NCELA).
- View TEA’s Special Education website.
• Visit the TEA webpage that summarizes the rules and regulations related to special education.
• Visit the National Center for Special Education in Charter Schools.
• View TEA’s Gifted and Talented website.

Prompt

1. Identify the special populations and at-risk groups that the school expects to serve. Summarize the school’s overall plan to serve students with diverse strengths and needs, including but not limited to students with disabilities, ELs, students identified as gifted/talented, and students at risk of academic failure or dropping out.

2. Explain more specifically how the school will identify and meet the learning needs of students with mild, moderate, and severe disabilities, including the following:
   a. Methods for identifying, evaluating, and appropriately placing students with disabilities (and for avoiding misidentification)
   b. Structures that will be implemented to ensure that research-based instructional programs, practices, and strategies are developed and delivered to provide a continuum of services for students with disabilities
   c. Plans to ensure students with disabilities have access to a free appropriate public education (FAPE) that meets their unique needs in the least restrictive environment (LRE)
   d. Plans for monitoring and evaluating the progress and success of student with mild, moderate, and severe disabilities to ensure the attainment of each student’s goals as set forth in their Individualized Education Program (IEP)
   e. Plans related to graduation and transition for students with disabilities (high school only)
   f. Plans to have qualified staffing adequate for the anticipated population (if not fully addressed in the Talent Management section)

3. Explain how the school will identify and meet the needs of ELs, including the following:
   a. Methods for identifying and appropriately placing ELs
   b. Structures that will be implemented to ensure that research-based instructional programs, practices, and strategies are developed and delivered to allow ELs to master grade-level academic content and develop their language proficiency in English and the home language (if implementing bilingual programs)
   c. Process to ensure that ELs have equitable access to all curricular and extracurricular programs
   d. Plans for monitoring and evaluating the progress and success of ELs, including students who have exited the program, and providing additional supports if students are not successful
   e. Plans to evaluate the effectiveness of the school’s programs for ELs
4. Explain how the school will identify and meet the needs of gifted/talented students, including the following:
   a. Strategies to identify gifted/talented students;
   b. Structures that will be implemented to ensure that research-based instructional programs, practices, and strategies are developed and delivered to meet the needs of gifted/talented students; and
   c. Plans for monitoring and evaluating the progress and success of gifted/talented students and programs.

If the school will not be providing specific services for gifted/talented students, explain why not.

**Evaluation criteria**

A strong response will:

- Present a sound explanation for the projections of special populations and at-risk groups that the school expects to serve.
- Demonstrate understanding of—and capacity to fulfill—state and federal obligations and requirements pertaining to students with disabilities, students identified as gifted/talented, and ELs.
- Outline a comprehensive and compelling plan to identify and serve students with disabilities that includes plans to ensure students with disabilities have access to a FAPE that meets their unique needs in the LRE, high school students have well-developed transition plans, all students with disabilities receive required and appropriate support services as outlined in their Individual Education Plans and 504 plans, and all students have access to schoolwide educational, extra-curricular, and culture-building activities.
- Outline a comprehensive and compelling plan to identify and serve ELs, including methods for appropriate identification of ELs, specific programs, practices, and strategies the school will employ to ensure ELs have equitable access to grade-level academic content, plans for monitoring student progress (in both academic content areas and in language proficiency), plans for exiting ELs from services, and plans for ensuring ELs have equitable access to schoolwide educational, extra-curricular, and culture-building activities.
- Detail plans to identify and serve gifted/talented students or provide a clear rationale for the exclusion of such services.
- Describe systematic district-level plans to develop a range of programs that will meet all students’ needs, monitor students’ progress over time, and evaluate the success of programs designed for students with disabilities, ELs, and gifted/talented students.
School Culture and Safety

Notes and definitions

- Charter schools are not subject to the majority of Chapter 37 in the Texas Education Code, related to school discipline, but exceptions are outlined below.
- TEC §12.131 requires charter schools to adopt a code of conduct that outlines prohibited behaviors and possible consequences. The code of conduct must also outline the school’s due process procedures with respect to expulsion.

Legal citations

- TEC §12.131: Removal of students to disciplinary alternative education programs; expulsion of students
- TEC §12.104(b)(2)(P): TEC §37.0832 applies to charters, related to bullying prevention policies and procedures.
- TEC §12.104(b)(2)(Q): TEC §37.0052 applies to charters, related to the placement or expulsion of students who have engaged in certain bullying behavior.
- TEC §37.007: Expulsion for serious offences
- TEC §37.008: Disciplinary alternative education programs
- TEC §37.015: Reports to local law enforcement
- TEC §37.011(a-4)(a-5): Juvenile justice alternative education program
- TEC §37.022: Notice of disciplinary action

Related resources for more information

- Learn more about TEA’s Effective Schools Framework, particularly Lever 3, actions 2-3.

Prompts

1. Describe the planned culture for the school, including the shared values, goals, expectations, and/or practices that will characterize the school’s culture. Discuss the systems and structures that will support implementation of the school’s culture. Explain how the school’s culture will be communicated to students, teachers, administrators, and parents and implemented consistently, beginning on the first day of school.

2. Explain in detail the school’s approach to student behavior, including student discipline practices that foster safe, supportive, inclusive, and productive learning environments. Provide as Attachment 8 the school’s proposed discipline policy. The policy must comply with Texas law. The description of the school’s approach and the policy should address each of the following:
   a. Practices the school will use to promote good discipline, including incentives for positive behavior;
b. A list and definitions of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended or expelled, respectively;
c. An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings; and
d. Procedures for due process when a student is suspended or expelled as a result of a code of conduct violation, including a description of the appeal process that the school will employ for students facing expulsion and a plan for providing services to students who are expelled or out of school for more than ten days.

3. Discuss how students, teachers, and parents will be informed of the school’s discipline policy.

4. Describe any required dress code or uniform policy.

5. Outline the plan to ensure that students, the facility, and school property are safe and secure. Explain the types of security personnel, technology, equipment, and policies that the school will employ.

Attachments

- 8: Proposed Discipline Policy
Evaluation criteria

A strong response will:
- Present a clear plan for establishing and maintaining a school culture that is aligned with the school’s mission, promotes high expectations, and communicates shared values and expectations for all students, including English learners, students with disabilities, and students at risk of academic failure. The school culture described is clearly designed to promote a positive, rigorous, and inclusive academic environment and positive social and emotional development for students.
- Explain the systems and structures that will support implementation of the school culture, including proactive and responsive support services (e.g., counseling, mentoring, external service referrals) that address students’ needs.
- Outline legally sound policies for student discipline that include: incentives for positive behavior; clear definitions of offenses for which students may or must be suspended or expelled; procedures for due process; and appropriate processes for students with disabilities.
- Describe discipline structures and systems that align with the school’s proposed culture. Explain how the school’s discipline policy will be implemented consistently to foster a safe, supportive, inclusive, and productive learning environment for all students, including how discipline referrals and interventions will be tracked and how that data will inform adaptations to practice or policy.
- Describe an appropriate plan for disseminating the discipline policy to teachers, parents, and students.
- Discuss the required dress code or uniform policy (if applicable).
- Outline a clear and comprehensive safety and security plan.
Promotion and Graduation Requirements

Legal citations

- TEC §12.104(b)(2)(e) notes that Texas high school graduation requirements apply to charter schools (as described in §28.025).
- TEC §12.111(b) encourages charter schools to consider requiring personal graduation plans, as described under §28.0212 and §28.02121.
- TEC §28.025: High School Diploma and Certificate; Academic Achievement Record
- TEC §28.0212: Junior High or Middle School Personal Graduation Plan
- TEC §28.02121: High School Personal Graduation Plan
- 19 TAC §74.11: High School Graduation Requirements

Related resources for more information

- Read more about Texas State Graduation Requirements on TEA’s website.

Prompts

1. For all proposed grades, describe the charter school’s policies and standards for promoting students from one grade to the next and exiting students who complete the educational program.
   a. Describe what students in the last grade served will know and be able to do.
   b. Include a description of the policies and procedures related to promotion and graduation for students with disabilities.
   c. Discuss how and when promotion and graduation criteria will be communicated to parents and students.

2. If a high school is being proposed, describe the school’s graduation requirements and address the following topics.
   a. Explain how the school will meet Texas high school graduation requirements (including endorsements).
   b. Describe how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered.
   c. Explain how the graduation requirements will ensure that students are prepared for success in college or other postsecondary opportunities.

3. Describe the systems, structures, and supports the school will put into place for students who are at risk of dropping out and/or of not meeting the proposed promotion or graduation requirements.
## Evaluation criteria

A strong response will:

- Outline clear, rigorous promotion and exit policies and standards.
- Discuss promotion and graduation standards for students with disabilities.
- Describe how and when promotion and graduation criteria will be communicated to parents and students.
- Present a sound plan for meeting Texas high school graduation requirements (including credits, GPA calculation, transcripts, electives, etc.).
- Explain how the school’s graduation requirements will ensure that students are prepared for college or other postsecondary opportunities.
- Describe effective systems, structures, and supports for students at risk of dropping out or of not meeting promotion or graduation requirements.
Family and Community Engagement

Legal citations

- TEC §12.1111(a)(9): Requirement for charter schools to disseminate information to parents about staff qualifications.

Related resources for more information

- Read more about TEA’s Effective Schools Framework, particularly Lever 3, Action 4.

Prompts

1. Describe how school leaders and staff will engage parents and community members from the time that the application is approved through the opening of the school.

2. Once the school opens, explain how school leaders will engage parents in the school (in addition to any proposed governance roles described in the Board Structure and Qualifications section) and solicit their feedback. Outline specific strategies that will be employed to build family-school partnerships that strengthen support for learning and encourage parental involvement. Specify how the school will engage and communicate with families if they speak a language other than English.

3. How does the school plan to share information about students’ academic progress with students and families? Explain how the school will distribute information to parents that summarizes the professional qualifications of the staff, as required by TEC §12.1111(a)(9).

4. Discuss any community resources that will be available to students and parents. Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich learning opportunities for students. Include, as Attachment 9, existing evidence of support from intended community partners such as letters of intent/commitment, memoranda of understanding, and/or contracts.

Attachments

- 9: Evidence of Community Support
Evaluation criteria

A strong response will:

✓ Outline a clear and comprehensive plan to create a welcoming and inclusive environment that will engage parents and community members in the school and build family-school partnerships that strengthen student learning.
✓ Specify how parents who speak a language other than English will be engaged in the school and how staff will communicate with them in a language they understand.
✓ Describe how parent satisfaction and community engagement data will be solicited on a regular basis, analyzed, and used to adapt plans if goals were not met.
✓ Highlight community resources that will be used to support the school’s education program and to provide services for students and families.
✓ Address the statutory requirement to distribute information to parents that summarizes the professional qualifications of the school’s staff.
Leadership and Governance

Board Structure and Qualifications

Notes and definitions

- It is recommended that the proposed governing board of the charter school should have no fewer than five identified individuals in order to provide effective oversight of the school and to participate in the considerable amount of work required to open a charter school.
- Family members who are related within the third degree of consanguinity or third degree of affinity are prohibited from serving on a charter school governing board. In addition, no family member within the third degree of consanguinity or third degree of affinity of any charter holder board member, charter school board member, or school officer shall receive compensation in any form from the charter school, charter holder, or any management company that operates the charter school unless exempted by TEC §12.1054(a)(2).

Legal citations

- TEC §12.111(a)(7-8): Requires applicants to describe the governing structure of the board and the powers and duties of the governing body.
- TEC §12.1051: Applicability of public meetings and public information laws
- TEC §12.1054: Applicability of laws related to conflict of interest
- TEC §12.1055: Applicability of nepotism laws
- Texas Government Code §573.021-573.025: Relationships by consanguinity or affinity
- 19 TAC §100.1113: Relationships by consanguinity or affinity

Prompts

1. Describe the governance structure of the proposed school, including the role of the board, how it will interact with the superintendent, and how the board will engage key stakeholders. Explain how this governance structure will facilitate the charter school’s educational and operational success. Address the following topics:
   a. What kinds of orientation or training will new board members receive, and what kinds of ongoing development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.
   b. Submit the board’s bylaws in Attachment 10 to describe how the board will function, how often it will meet, and how board members will be selected. Describe plans for any committee structure.
   c. Describe the board’s ethical standards and procedures for identifying and addressing conflicts of interest. Provide, as Attachment 11 the board’s proposed Code of Ethics and Conflict of Interest policy.
d. Explain the process that the school will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure, or practice at the school.

e. Discuss the process, tools, and metrics that will be used to assess and promote board effectiveness.

2. Describe the ideal size and composition of the governing board, including the number of proposed board members and the number who reside in Texas. Provide, as Attachment 12, résumés and biographical affidavits for each proposed board member.

Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Complete the table in the Board Structure and Qualifications section of the Generation 25 application response to describe how each current or proposed board member will contribute to effective governance of the proposed school. Areas of members’ expertise might include, among others: education, finance, law, facilities, management, marketing, human resources, fundraising, community service, or parent involvement.

3. Submit, as Attachment 13, two organizational charts that show the school’s governance, management, and staffing structures in: 1) Year 1; and 2) at full capacity. The organizational charts should clearly delineate the lines of authority and reporting among the governing board, staff, and any external organizations that will play a role in managing the school. The organization charts should also document clear lines of authority and reporting within the charter school.

4. Explain how the superintendent will be supported, developed, and evaluated each school year. Outline performance expectations for the superintendent and specific metrics that the board will use to evaluate her/his performance. Provide, in Attachment 14, any leadership evaluation tool(s) that have been developed. Metrics must be provided to measure performance in the following areas:

   a. Governance and board relations;
   b. Community relations;
   c. Staff management;
   d. Academic performance;
   e. Finance and operations; and
   f. Instructional leadership.

Attachments

- 10: Board’s Bylaws
- 11: Code of Ethics and Conflict of Interest Policy
- 12: Board Members’ Résumés and Biographical Affidavits
- 13: Organizational Charts for Year 1 and Full Capacity
- 14: Tool(s)/Process to Evaluate Superintendent

Generation 25 Application Instructions & Guidance
Evaluation criteria

A strong response will:

- Provide a detailed description of the board’s structure and primary responsibilities that demonstrates a thorough understanding of the differences between the roles and responsibilities of the board versus the school leader and that is consistent with state law.
- Provide comprehensive bylaws that define the officers, the length of board terms, and term limits. The bylaws should outline a clear process and timeline for recruiting and appointing board members. Further, the bylaws should describe how the board will function, including the frequency of meetings and the committee structure.
- Describe a fair, accessible grievance process that specifies the role of the board when a staff member or a parent has a grievance and clearly articulates goals in terms of monitoring and resolving staff and parent complaints.
- Outline a process that will be used to regularly evaluate board function and strengthen board practices.
- Describe how the proposed size and composition of the board will effectively support the academic and operational success of the school.
- Identify a diverse roster of proposed board members who have a range of skill sets in areas such as: education, finance, law, facilities, management, marketing, human resources, fundraising, community service, or parent involvement. As documented through résumés and biographical affidavits, proposed board members should have: the experience and qualifications necessary to implement the proposed educational program; the capacity to found and sustain an excellent charter school; the ability to manage public funds effectively and responsibly; and tangible ties to, and broad and diverse representation from the communities the school will serve.
- Provide two organizational charts: (1) for Year 1 of operation; and (2) at full capacity that include well-defined roles for all employees of the proposed school and the board. The organizational charts should clearly describe lines of authority and communication between the board and the superintendent and between school leaders and staff at the proposed school. The charts should note any core operations that will be outsourced to third parties, consultants, or to the school’s third-party service provider.
- Outline a sound plan for supporting, developing, and evaluating the superintendent. Provide well-developed examples of tools that will be used to evaluate the performance of the superintendent. Metrics on which the superintendent is evaluated should include: governance and board relations; community relations; staff management; academic performance; finance and operations; and instructional leadership. Evaluation tools should be aligned with the school’s mission and goals and with the measurable performance expectations that were described.
Proposed Superintendent Qualifications

Notes and definitions

• The next two sections should focus on the capacity of the leadership team to implement the educational program described in this proposal. Although there may be some references to the larger leadership/management team in this section, the emphasis should be on instructional leadership provided by the superintendent and school leaders.

• The superintendent must reside in Texas at the time of employment.

• Open-enrollment charter schools may not compensate an individual in excess of the fair market value of the services rendered. The fair market value of the services rendered is based on the individual’s education, experience, prior salary history, job duties actually performed, and what a typical person with similar skills, experience, and job duties would earn.

Legal citations

• 19 TAC §100.1022 (c)(1)(A)(i): Payment in excess of fair market value.

Prompts

1. Identify the candidate for superintendent and explain why this individual is qualified to lead the proposed school in achieving its mission. Summarize the proposed leader’s academic and organizational leadership record. Provide specific evidence that demonstrates her/his capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that s/he has completed or in which s/he is currently participating. Describe evidence of the leader’s ability to effectively serve the anticipated population. Also provide, as Attachment 15, the qualifications, résumé, and professional biography for this individual.

2. If no candidate for superintendent has been identified, provide as Attachment 16 the job description, qualifications, and performance expectations for the position. Discuss the timeline, criteria, and recruiting and selection process for hiring the superintendent.

3. State the starting salary of the superintendent and explain how this figure was determined.

4. Outline the school’s leadership succession plan. Describe the school’s plans to develop and maintain a leadership pipeline.

Attachments

• 15: Résumé and Qualifications for Proposed Superintendent OR
• 16: Job Description or Qualifications for Superintendent
Evaluation criteria

A strong response will:

✓ Provide compelling evidence to demonstrate that the proposed superintendent (documented by a résumé/professional biography) has the skills, experience, and capacity to design, launch, and lead a high-quality school that effectively serves the targeted population OR outline a clear process (including timelines and criteria) to recruit, select, and hire an effective superintendent.

✓ Propose a starting salary range that is reasonable with respect to estimated student enrollment.

✓ Present a proactive leadership succession plan to ensure consistency in implementing the mission and vision of the school. Describe how a leadership pipeline will be developed and maintained, including both internal candidate development and external partnerships for leadership development.

✓ Reference budget amount(s) that are congruent with the financial plan workbook.
Proposed Instructional Leadership Team

Related resources for more information

- Learn more about TEA’s Effective Schools Framework, particularly **lever 1**, essential action 1.

**Prompts**

1. Describe the roles, responsibilities, and qualifications of the school’s instructional leadership team beyond the superintendent. If known, identify the individuals who will fill these positions and provide, as **Attachment 17**, the qualifications, résumés, and professional biographies for these individuals. Describe the team’s individual and collective qualifications to implement the educational program successfully, including capacity in areas such as:
   a. School leadership, administration, and governance;
   b. Curriculum, instruction, and assessment;
   c. Data-driven decision making;
   d. Special populations (including, but not limited to English learners and students with disabilities);
   e. Professional development;
   f. Performance management;
   g. Experience in or knowledge of the target community; and
   h. Parent and community engagement.

2. If candidates for positions on the school’s instructional leadership team have not been identified, provide as **Attachment 18** the job descriptions, qualifications, and performance expectations for these positions. Discuss the timeline, criteria, and recruiting and selection process for hiring members of the school’s instructional leadership team.

3. Explain how school leaders will be supported, developed, and evaluated each school year. Provide, in **Attachment 19** any leadership evaluation tool(s) that have been developed.

**Attachments**

- 17: Résumés and Qualifications for Proposed Instructional Leadership Team AND/OR
- 18: Job Descriptions or Qualifications for School’s Instructional Leadership Team
- 19: Tool(s)/Process to Evaluate Members of the School’s Instructional Leadership Team
Evaluation criteria

A strong response will:

✓ Provide compelling evidence to demonstrate that the school’s instructional leadership team has the collective qualifications (documented by résumés or job descriptions for all members) to implement the proposed model successfully, including skills, experience, and capacities in areas such as school leadership, administration, and governance; curriculum, instruction, and assessment; data-driven decision making; special populations (including, but not limited to English learners and students with disabilities); professional development; performance management; experience in or knowledge of the target community; and parent and community engagement OR outline a clear process (including timelines and criteria) to recruit, select, and hire an effective team.

✓ Outline a sound plan for supporting, developing, and evaluating school leaders. Provide well-developed examples of tools that will be used to evaluate the performance of school leaders. These tools should be aligned with the school’s mission and goals and with the measurable performance expectations that were described for each role.

✓ Reference budget amount(s) that are congruent with the financial plan workbook.
Proposed Financial and Operations Leadership Teams

Notes and definitions

- In this section, the applicant team should demonstrate that they have the capacity to run the business side of the charter school operation, to manage the charter school’s day-to-day operations, and to effectively implement the financial and operational plans that are outlined in this proposal.
- The narrative response in this section—and the supporting résumés/qualifications—should focus on the teams that will be led by the chief financial officer (CFO) and the chief operating officer (COO).
- The Public Education Information Management System (PEIMS) encompasses all data requested and received by TEA related to student demographics, academic performance, finances, operations, and personnel. More importantly, open-enrollment charter schools receive their Foundational School Program (FSP) funds based on average student daily attendance, which is collected, approved, and submitted directly by the charter school superintendent. A failure on the part of the charter school to report accurate data may result in the recapture of FSP funds.

Legal citations

- TEC §12.104(b)(2)(A) requires charter schools to report data through PEIMS.
- TEC §7.010 requires charter schools to use an electronic student records system that satisfies standards approved by the commissioner of education.

Related resources for more information

- Review the Texas Education Data Standards for more information about the Texas Student Data System and PEIMS data collections.

Prompts

1. Describe the applicant team’s individual and collective qualifications for implementing the financial plan successfully, including capacity in areas such as the following:
   - Budget development;
   - Financial management;
   - Accounting and internal controls; and
   - Fundraising/development.

Provide, as Attachment 20, résumés for proposed members of the financial team. If candidates for key positions have not been identified, provide the job descriptions or qualifications for those positions.
2. Outline the applicant team’s individual and collective qualifications for implementing the operations plan successfully, including capacity in areas such as the following:
   • General operations;
   • Facilities acquisition and management (including build-out and/or renovations, as applicable);
   • Talent management (including recruiting, hiring, and managing staff);
   • Policy development and implementation;
   • Contract management;
   • Reporting data in PEIMS;
   • Student recruitment and enrollment; and
   • School safety.

Provide, as Attachment 21, résumés and qualifications for proposed members of the operations team. If candidates for key positions have not been identified, provide the job descriptions or qualifications for those positions.

3. Specifically address plans for hiring a PEIMS coordinator.
   • If a PEIMS coordinator will be employed, specify the year of the first charter term in which the PEIMS coordinator will join the school’s staff. As part of Attachment 21, specify the starting salary range for the position as well as the education and experience requirements for the PEIMS coordinator.
   • If a PEIMS coordinator will not be employed, outline which position(s) on the organizational chart will be responsible for all applicable duties associated with PEIMS collection and reporting and describe the rationale for this decision.
   • Describe plans to train the PEIMS coordinator or individuals charged with PEIMS-related duties, including timelines and budgeted funds.

Attachments

• 20: Résumé(s) and/or Qualifications for Proposed Financial Team
• 21: Résumé and Qualifications for Proposed Operations Team
Evaluation criteria

A strong response will:

✓ Provide compelling evidence of the applicant team’s capacity to effectively implement the financial plan.

✓ Demonstrate that the financial team has (or will be required to have) sufficient experience and expertise in the following areas: budget development; financial management; accounting and internal controls; and fundraising/development.

✓ Demonstrate that the operations team has (or will be required to have) sufficient experience and expertise in the following areas: general operations; facilities acquisition and management; talent management (including recruiting, hiring, and managing staff); policy development and implementation; contract management; reporting data in PEIMS; student recruitment and enrollment; and school safety.

✓ Describe a comprehensive plan to train any individuals who will fulfill PEIMS-related duties.
Performance Management

Notes and definitions

The TEA evaluates the academic, financial, and operational performance of every charter school annually. The Charter School Performance Frameworks (CSPF) outline the standards and indicators that are used to conduct this evaluation. Academic performance indicators include overall academic accountability ratings, accountability ratings for each of the charter school’s campuses, the academic performance of subgroups, and English learners’ progress on measures of English language proficiency. Financial performance indicators consider overall performance on Charter FIRST and critical solvency measures. Operational indicators are primarily related to compliance with federal and state laws and regulations.

Legal citations

- TEC §12.1111(a)(3): Charter school applicants must specify the academic, operational, and financial performance expectations that will be used to evaluate the proposed charter school.
- TEC §12.1181: Performance frameworks; annual evaluations
- 19 TAC §100.1010: Performance frameworks

Related resources for more information

- Learn more about TEA’s Effective Schools Framework, particularly Lever 1, Action 2.

Prompts

1. Describe how the board and the school leadership team plan to set goals and periodically track the charter school’s performance throughout the school year, at the end of each academic year, and by the end of the term of the charter contract. Include the following:
   a. Academic, financial, and operational performance indicators included in the Charter School Performance Framework (CSPF);
   b. Other indicators and metrics that will be monitored;
   c. How often each indicator will be assessed; and
   d. Thresholds that will determine success or failure.

2. How will the board and the school leadership team use the information it gathers to continuously improve the performance of the charter school? Describe the corrective actions the school will take if it falls short of expectations for academic, financial, and operational performance. Explain what would trigger such corrective actions and who would be responsible for implementing them.
3. List the board member(s) who have the expertise and capacity to lead a review of each of the performance indicators described above and explain how her/his experience is related to the specific indicator that was identified.

**Evaluation criteria**

A strong response will:

- Present meaningful and measurable indicators and performance targets that will be used to evaluate the school’s academic, financial, and operational performance during the school year, at the end of the school year, and at the end of the first charter term.
- Describe the roles of school leaders, staff, and board members in the collection, analysis, and use of data.
- Outline how data will be used to identify areas for growth and to inform decisions about changes that will be made to improve the school’s academic, financial, or operational performance.
- Identify board members who have the capacity to assess specific areas of academic, financial, and operational performance.
Talent Management and Development

Talent Management

Notes and definitions
- Talent management refers to a comprehensive, coherent system for recruiting, hiring, placing, and retaining high-quality staff.
- All principals and teachers must hold a baccalaureate degree. Special education teachers, bilingual teachers, teachers of English as a second language, and prekindergarten teachers must also be certified in the fields they are assigned to teach, as required by state law.

Legal citations
- TEC §12.129: Minimum qualifications for principals and teachers
- TEC §12.104(b)(2)(F-H): Rules and requirements for special education programs, bilingual education programs, and prekindergarten programs apply to charter schools.
- TEC §29.061: Bilingual Education and Special Language Program Teachers
- TEC §29.167: Prekindergarten: High-quality Curriculum and Teacher Requirements

Related resources
- Learn more about TEA’s Effective Schools Framework, particularly lever 2, essential action 1.

Prompts
1. Describe the strategy, plans, and timeline to recruit, hire, and place both instructional staff and individuals who will support the operation of the proposed school (e.g., paraprofessionals, office staff, custodial and food service staff, etc.). Discuss plans to recruit and hire staff who will effectively serve English learners, students with disabilities, and other student groups. Explain how the school will evaluate the effectiveness of its talent management plan and adapt policies or processes if targets are not met.

2. Outline the school’s procedures for hiring and dismissing school personnel, including conducting criminal background checks.

3. Discuss strategies that will be utilized in the event of unforeseen staff shortages.

 Provide, as Attachment 22, a complete staffing chart for the school. The staffing chart should follow the template provided in Attachment 22. It should identify administrative, instructional, and non-instructional positions that will be staffed in Year 1, as well as positions to be added in future years. In the final row of the staffing chart template, the teacher-student ratio should be calculated for each year of operation. Supplemental human resources information forms for each position on the staffing chart should be included in Attachment 23.
Attachments

- 22: Staffing Chart
- 23: Supplemental Human Resources Information Forms for Each Position on the Staffing Chart

Evaluation criteria

A strong response will:

- Outline a comprehensive, well-developed talent management plan—including strategies, timelines, and responsible individuals—that is likely to result in the school attracting, recruiting, hiring, and placing high-quality staff who will effectively serve all students.
- Describe an ongoing and proactive recruitment campaign that includes many sources for high-quality candidates with desired areas of expertise.
- Address any foreseeable obstacles to successfully recruiting quality staff and provide clear strategies to overcome those obstacles.
- Outline specific, sound strategies to address unforeseen staff shortages.
- Describe a strategic approach to placing teachers that is based on student needs and teacher strengths.
- Explain how the school will evaluate the effectiveness of its talent management plan—including specific strategies, metrics, targets, and schedules—and adapt existing policies or processes if targets are not met.
- Outline clear procedures for hiring and dismissing school personnel, including how criminal background checks will be conducted.
- Provide a staffing chart, supporting documents, and a talent management plan that are consistent with the budget, organizational charts, student enrollment projections, and staffing levels described in other sections of the proposal.
- Present a staffing chart and supporting documents that are viable and adequate for the effective implementation of the proposed educational program. The staffing chart should reflect a sensible allocation of staff—for each year—to central office, administrative, instructional, and non-instructional positions. The instructional positions should include adequate numbers of bilingual/ESL teachers, special education teachers, paraprofessionals, and specialty teachers.
Professional Development and Evaluation

Related resources for more information

- Read more about Texas Lesson Study.
- Learn more about TEA’s Effective Schools Framework, particularly:
  - Lever 2, essential action 2
  - Lever 4, essential action 1
  - Lever 5, essential actions 1-3

Prompts

1. Discuss the core components of the professional development plan and how these components will support effective implementation of the educational program. Discuss the extent to which professional development will be conducted internally or externally and whether it will be individualized or uniform.

2. Provide a schedule for professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be trained to deliver any unique or particularly challenging aspects of the educational program. Describe how teachers will be compensated for their time during the induction period.

3. Outline the expected number of days/hours for professional development throughout the school year, and explain how the school’s calendar, daily schedule, and staffing structure will accommodate this plan. Include time scheduled for common planning or collaboration and describe how such time will typically be used.

4. Explain how teachers will be supported, developed, and evaluated each school year. Provide, in Attachment 24, any teacher evaluation tool(s) that already exist for the school. Explain how the school intends to handle unsatisfactory teacher performance.

Attachments

- 24: Teacher evaluation tool(s)
Evaluation criteria

A strong response will:

✓ Describe the proposed professional development plan and discuss how the components of that plan are aligned with the school’s mission, goals, and proposed educational program.

✓ Outline a clear schedule for professional development that will occur both before the school opens and during the school year. Demonstrate that the professional development offered will be sufficient to support teachers in implementing the complete educational program with fidelity.

✓ Explain how the school will provide high-quality induction opportunities for newly hired educators.

✓ Describe, in the professional development plan, an induction program that will prepare all teachers to deliver any unique or particularly challenging aspects of the educational program.

✓ Describe how the professional development plan allocates time for teacher collaboration, planning, and data analysis.

✓ Explain how professional development content is informed and differentiated by data on student performance, teacher evaluations/coaching cycles, and teacher needs and interests.

✓ Describe how teachers will be trained to support the unique needs of all students, including English learners and students with disabilities.

✓ Outline the plan for providing teachers with formative and summative feedback that can inform their practice, including tools and processes that will be used to evaluate teachers throughout the school year. Explain how school leaders will address unsatisfactory teacher performance.

✓ Present a professional development plan that is aligned with the school’s proposed calendar, daily schedule, staffing plan, and financial workbook.
Retention

Related resources
- Learn more about TEA’s Effective Schools Framework, particularly lever 2, essential action 1.

Prompts
1. Describe the strategy, plans, and timeline to retain both instructional staff and individuals who will support the operation of the proposed school.

2. Outline the proposed school’s salary ranges and employment benefits for all employees, as well as any incentives or reward structures that may be part of the compensation system.

3. Explain the school’s strategy for retaining high-performing teachers.

Evaluation criteria

A strong response will:
- Outline a comprehensive, well-developed talent management plan—including strategies, timelines, and responsible individuals—that is likely to result in the school retaining high-quality staff.
- Describe compensation packages that are likely to attract and retain high-quality staff.
- Explain how school leaders will employ targeted and personalized strategies to support and retain staff, particularly high-performing teachers.
Operational and Financial Plans

School Calendar and Schedule

Notes and definitions

To receive full funding, a charter school must offer 75,600 minutes of instruction (including intermissions and recess) minus any minutes waived by the TEA in writing.

Legal citations

• TEC §25.081: Operation of Schools
• 19 TAC §129.1025: Adoption by Reference: Student Attendance Accounting Handbook

Related resources for more information

• View resources, such as the Student Attendance Accounting Handbook, and related documents in the Additional Resources section of TEA’s student attendance webpage.

Prompts

1. Describe the proposed annual school calendar and explain how it aligns with the proposed educational program. In Attachment 25, provide the proposed calendar for the first year of operation, including the first and last day of school, any planned breaks, and the total number of minutes of instruction.

2. Describe the structure of the school day and week and explain how it aligns with the proposed educational program. Provide, as Attachment 26, a sample daily and weekly schedule for a student and for a teacher. Include:
   a. Length of the school day, including start time, dismissal time, and any variations by grade level;
   b. Minimum number of minutes per day and per week that the school will devote to academic instruction in each grade; and
   c. Number of instructional minutes in a day for core subjects such as language arts, mathematics, science, and social studies.

Attachments

• 25: Proposed School Calendar (Annual)
• 26: Proposed School Schedule for Day and Week: Teacher and Student Versions
Evaluation criteria

A strong response will:

- Present an annual school calendar that meets or exceeds state requirements (at least 75,600 minutes of instruction) and aligns with the proposed educational program.
- Present clear examples of daily and weekly schedules for a teacher and a student that meet state requirements for instructional minutes and are consistent with the proposed educational program.
- Provide a compelling rationale to explain how the school schedules and annual calendar will optimize student learning.
Student Recruitment and Enrollment

Notes and definitions

• Review the specific requirements for Attachment 27 on the application response.
• Open-enrollment charter schools must explicitly prohibit discrimination in their admission policies (TEC §12.111(a)(5)). There are two exceptions to this requirement. First, charter schools that specialize in the performing arts may require students to audition as part of the admission process. Second, charter schools may exclude students who have a documented history of a criminal offense, a juvenile court adjudication, or discipline problems.
• To ensure financial viability, open-enrollment charter schools must commit to serving a minimum of 100 students at all times (19 TAC §100.1015(b)(1)(D)).
• Open-enrollment charter schools must explicitly specify any enrollment criteria that will be used (TEC §12.111(a)(14)).
• Senate Bill 2293, passed in 2019, will require that open-enrollment charter schools use a common admission application form.

Legal citations

• TEC §12.111(a)(5) and (a)(14): Admissions and enrollment requirements
• TEC §12.117: Admission requirements
• TEC §12.1171: Admission to open-enrollment charter schools specializing in performing arts
• 19 TAC §100.1015(b)(1)(D): Requirement to serve a minimum of 100 students

Prompts

1. Explain the plan—along with the projected timelines—for student recruitment and marketing efforts. Identify any student populations that will be targeted for recruitment. Discuss recruitment strategies that will be used to reach out to the targeted populations and to ensure that all interested students and families have equitable access. Specifically describe the plan for outreach to low-income families, English learners, academically low-achieving students, students with disabilities, and other youth at risk of academic failure.

2. Provide metric(s) that will be used to evaluate the effectiveness of recruitment strategies in Year 0 (start-up year) and Year 1. Explain how the board and the leadership team will adjust recruitment strategies if enrollment numbers are lower than expected.

3. Provide, as Attachment 27, the school’s admission and enrollment policy, which should include the elements outlined on the Attachment 27 cover page in the Generation 25 application response.
Evaluation criteria

A strong response will:

- Outline a detailed marketing and recruitment plan, including strategies, timelines, responsible parties, costs, and benchmarks. Explain how the plan will lead to attainment of the school’s enrollment targets in Year 0 (start-up) and Year 1.
- Identify any groups to be targeted for student recruitment and describe why these groups will be well served by the school’s proposed educational program.
- Describe differentiated outreach strategies that will be used to ensure all students and families have equitable access to the school, including: low-income families; English learners; academically low-achieving students; students with disabilities; and other youth at risk of academic failure.
- Present metrics that will measure the effectiveness of the recruitment plan in Year 0 and Year 1.
- Outline contingency plans that will be implemented if enrollment numbers are lower than expected.
- Present costs associated with recruitment and marketing efforts that are congruent with the financial workbook.
- Provide a draft of the school’s admission and enrollment policy that includes tentative start and end dates for the application window and the enrollment period; enrollment deadlines and procedures; policies and procedures for student waiting lists and lotteries; policies and procedures for withdrawals, re-enrollment, and transfers; and an explanation of the purpose of any pre-admission activities for students or parents. The policy should:
  - Present an application period and application process that clearly supports fair and equitable opportunity for all students.
  - Describe a fair and equitable selection process in the event of oversubscription.
  - Demonstrate alignment with admission and enrollment requirements described in Texas statutes and rules.
  - Include a non-discrimination statement that meets the requirements of TEC §12.111(a)(5).
Facility Acquisition

Notes and definitions

- There are two scenarios in this section: “Facility Identified” and “Facility Not Identified.” Complete only the section that is relevant. If the applicant has a physical address for at least one proposed campus, complete the “Facility Identified” section. If the applicant does not have a physical address for at least one campus, complete the “Facility Not Identified” section.
- If the “Facility Not Identified” section is completed, mark “Not Applicable” on the cover pages for Attachments 28 and 29.
- Prior to opening and serving students, all charter holders must provide the TEA with a Certificate of Occupancy with an “E” or Education rating for the facility. The certificate must be issued by the appropriate local authority. In addition, the facility must comply with all applicable federal, state, and local health and safety requirements.

Legal citations

- TEC §12.111(a)(12): Applicants must describe the facilities to be used.
- TEC §12.1054: Applicability of laws relating to conflict of interest
- TEC §12.1053: Applicability of laws relating to public purchasing and contracting
- 19 TAC §100.1006: Optional Open-Enrollment Charter Provisions for Contracting and Purchasing
- Texas Government Code, Title 10, Subtitle F, Chapter 2252, Subchapter D: Real property held in trust
- Texas Local Government Code, Title 8, Subtitle C, Chapter 271, Subchapter B: Competitive bidding on certain public works contracts

Related resources for more information

- Learn more about Facilities Funding and Standards/Bonds Guarantees.

Prompts

Complete the table in the “Facility Acquisition” section of the Generation 25 application response. If a facility has been identified, complete the “Facility Identified” section. If a facility has NOT been identified, complete the “Facility Not Identified” section.

Facility Identified

1. Complete the tables in the “Facility Identified” section of the Generation 25 application response. If the applicant has a certificate of occupancy for the facility, provide a copy as Attachment 28.

2. Describe the facility, including location, amenities, and the number and size of classrooms, common areas, and recreational space(s). Explain how the facility aligns with the proposed charter school’s mission, vision, educational program, operational plan, and enrollment growth projections.
3. Describe the process used to identify and secure the proposed facility. Identify individuals/organizations that played a significant role in the selection and/or procurement process.

4. If applicable, detail any plans for construction and/or renovation that will be needed to bring the facility into compliance with local building codes (E rating) and the Americans with Disabilities Act (ADA).

5. If the applicant currently owns the facility, has a lease, or has an MOU or other proof of intent to secure a specific facility, provide proof of the commitment as Attachment 29. If Attachment 29 does not outline the terms of the proposed acquisition process, describe the planned acquisition process, including projected timeline(s) and projected cost(s). If leasing, explicitly state that the applicant will NOT be within the third degree of consanguinity or affinity to the lessor.

Attachments

- 28: Certificate of Occupancy for Facility
- 29: Evidence that Facility has been Secured

Evaluation criteria: Facility identified

A strong response will:

- Provide a detailed description of the facility, including location, amenities, and the number and size of classrooms, common areas, and recreational space(s).
- Explain how the facility aligns to the proposed school’s mission, vision, educational program, operational plan, and enrollment growth projections.
- Review the process that was used to identify and secure the proposed facility (together with the requisite financing), including market research, selection criteria, timelines, and relevant individuals/organizations that played a significant role in the procurement process.
- If applicable, outline a sound renovation/construction plan—including timelines and costs—that will bring the facility into compliance with local building codes and the Americans with Disabilities Act.
- Provide evidence of the commitment to secure the facility, or describe the plan to purchase or lease the facility, which includes timelines and costs.
- Affirm that the applicant, if leasing, will NOT be within the third degree of consanguinity or affinity to the lessor.
- Present budget costs and financing arrangements that are congruent with the financial workbook.
Facility Not Identified


2. Describe the ideal facility, including location, amenities, and the number and size of classrooms, common areas, and recreational space(s). Explain how the ideal facility will align with the proposed charter school’s mission, vision, educational program, operational plan, and enrollment growth projections.

3. Describe the facility’s minimum needs, including location, amenities, and the number and size of classrooms, common areas, and recreational space(s) that are required to accomplish the proposed charter school’s mission, vision, educational program, operational plan, and enrollment growth projections.

4. Describe plans for identifying and securing a facility. Include:
   a. Market research and analysis;
   b. Selection criteria;
   c. Plans to secure financing;
   d. Timelines;
   e. Costs;
   f. Plans to renovate the selected facility to bring it into compliance with local building codes (E rating) and the Americans with Disabilities Act (ADA);
   g. Relevant individuals/organizations that will play a significant role in the facility selection and/or procurement process, including any organizations that might be contracted for facility build-out, renovation, etc.; and
   h. If leasing, explicitly state that the applicant will NOT be within the third degree of consanguinity or affinity to the lessor.
**Evaluation criteria: Facility not identified**

A strong response will:

- Provide a detailed description of the ideal facility, including location, amenities, and the number and size of classrooms, common areas, and recreational space(s).
- Explain how the ideal facility will align to the proposed school’s mission, vision, educational program, operational plan, and enrollment growth projections.
- Identify minimum facility needs that are required to accomplish the proposed charter school’s mission, vision, educational program, operational plan, and enrollment growth projections.
- Outline a sound plan to identify and secure a facility (together with the requisite financing), including market research, selection criteria, timelines, and costs.
- Identify the relevant individuals/organizations that will play significant roles in the facility selection and procurement process, including their qualifications and/or experience.
- If applicable, outline a sound renovation/construction plan—including timelines and costs—that will bring the selected facility into compliance with local building codes and the Americans with Disabilities Act.
- Affirm that the applicant, if leasing, will **NOT** be within the third degree of consanguinity or affinity to the lessor.
- Present budget costs and financing arrangements that are congruent with the financial workbook.
Transportation

Notes and definitions
- All references to “daily bus transportation” should reflect any transportation services (provided by the school) that will facilitate student pick-up and drop-off.
- Charter schools must provide transportation services to individual students, if such services are included in their Individualized Education Program (IEP).

Legal citations
- TEC §12.109: Transportation
- Texas Education Code, Chapter 34: Transportation

Related resources for more information
- View TEA’s School Transportation Funding webpage for more information about the transportation allotment.
- Read the School Transportation Allotment Handbook to learn more about students who are eligible for transportation, types of route services, and reporting requirements.

Prompts
1. If student transportation will not be offered, describe the rationale for that decision. If the school will provide transportation, describe the transportation arrangements for prospective students, including:
   a. Whether daily bus transportation will be offered to all students;
   b. Whether the school will provide public transportation vouchers (e.g., bus passes); and
   c. When bus services will begin (during which year of the charter term).

2. Explain how transportation will be provided for students if their Individualized Education Program (IEP) requires transportation.

3. Describe how the school plans to meet transportation needs for field trips and athletic events.
Evaluation criteria

A strong response will:

- Present a detailed transportation plan, or travel voucher program, that will effectively serve all potential students in the proposed geographic boundaries, including low-income students and students with disabilities.
- Detail viable plans (and associated costs) for students whose IEP requires transportation.
- Present budget costs and financing arrangement(s) that align with the financial workbook and that are fiscally viable. These costs should include both “daily bus transportation” (if provided) and transport to field trips and athletic events.
Start-up Plan

Notes and definitions
- The start-up plan described in this section should align with the start-up budget tab in the Financial Plan Workbook.
- Applicants must select financial accounting software that facilitates compliance with the requirements discussed in the Special Supplement to the Financial Accounting System and Resource Guide for charter schools (view module 2).

Prompts
1. Describe the costs anticipated during the start-up year. Include:
   a. Personnel;
   b. Contracted services;
   c. School operations; and
   d. Facility acquisition, operation, and maintenance.
2. Describe how the board will monitor the implementation of the start-up plan and associated budget.
3. Explain which staff will work on a full-time or nearly full-time basis to lead development of the school during the start-up year and the plan to compensate these individuals.
4. Provide a detailed start-up plan for the school as Attachment 30 for the year between charter approval (September 2020) and school opening (August 2021). The plan should specify tasks, timelines, and individuals responsible for each task. Include specific contingency plans if anticipated funding is not received or is lower than estimated.

Attachments
- 30: Detailed Start-Up Plan
Evaluation criteria

A strong response will:

✓ Outline a detailed and comprehensive start-up plan for leading the development of the school from post-approval to opening. The plan should specify tasks, timelines, and individuals responsible for each task.
✓ Outline the costs associated with all start-up activities listed in the start-up plan.
✓ Identify a capable individual or team to lead the planning and start-up. Outline a viable plan for compensating the individual or team that is aligned with the budget.
✓ Include contingency plans that describe how the start-up plan will be modified in the event of a budget shortfall.
✓ Describe how the board will monitor the implementation of the start-up plan and budget.
✓ Present expenses and revenues that are congruent with the financial workbook.
Financial planning

Notes and definitions
- View instructions and guidance embedded within the Financial Plan Workbook, available on the Subchapter D Application Page.
- According to TEC §29.153, a child who is eligible for enrollment in a prekindergarten class will only generate half-day attendance.

Legal citations
- TEC §12.111(a)(10-11): Requirements to adopt an annual budget and conduct an annual audit
- TEC §39.083: Reporting (related to AFRs)
- TEC§44.008: Fiscal Management (related to AFRs)
- 19 TAC §109.23: (related to AFRs)

Related resources for more information
- Review resources related to House Bill 3, including: charter school funding; budgeting resources; and required full-day pre-K programs for all eligible 4-year old’s (if pre-K is offered).
- Learn more about the Foundation School Program [FSP] and Charter School Finance
- View resources available through TEA’s Financial Compliance Division including:
  - Financial Compliance webpage
  - Financial Accountability System Resource Guide (FASRG), which describes the rules of financial accounting for charter schools (particularly module 10, the special supplement for charter schools).
  - Annual financial and compliance reports
  - Charter Financial Integrity Rating System of Texas (Charter FIRST)

Prompts
1. Complete the fiscal year template table in the Generation 25 application response.

2. Describe the systems, policies and processes the school will use for financial planning, accounting, purchasing, and payroll. Explain how the school will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements.

3. Outline the roles and responsibilities of the school’s administration and governing board for school finances and distinguish between each.

4. Describe how the school will ensure financial transparency to the TEA and the public, including plans for public adoption of its budget and public dissemination of its annual financial and compliance report (AFR).

5. Describe any services to be contracted, such as food services, transportation, business services, payroll, and auditing services, including the anticipated costs, the year during
the charter term when these contracted services will begin, and the criteria to be used for selecting such services.

6. Submit the Financial Plan Workbook as **Attachment 31**.

7. Provide a detailed budget narrative as **Attachment 32**. Describe the assumptions behind the projections for revenue, staffing levels, and costs that are outlined in the Financial Plan Workbook.
   a. Indicate the amount and sources of funds, property, or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated. Explain the basis for assumptions around unsecured/anticipated funding sources. Address the degree to which the school/campus budget will rely on income that does NOT come from the TEA’s Foundation School Program (e.g., grants, donations, fundraising).
   b. Include evidence of commitment for any funds as **Attachment 33**. Provide the cumulative total amount for each of the following and the number of donors included in each of the four categories: (1) donations collected; (2) donations with a firm commitment; (3) additional donations anticipated; and (4) donations contingent upon charter being awarded.
   c. Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.
   d. Provide a detailed cash flow contingency for Year 1 in the event that revenue projections are not met in advance of opening.

8. Provide evidence of the charter applicant’s financial status, including the most recent financial audit report (AFR) as **Attachment 34**, a recent credit report as **Attachment 35**, and the most recently filed IRS form 990, 990-N, or 990-EZ as **Attachment 36**. Provide an explanation if these documents are not available.

9. Describe any planned fundraising efforts, the goals of the fundraising campaign(s), and who will lead and coordinate these efforts.

10. Describe the school’s plans for purchasing liability insurance to indemnify the school, its board, staff, and teachers against tort claims. Provide, as **Attachment 37**, a list of the types of insurance coverage the school will secure, including a description of the levels of coverage. Types of insurance might include workers’ compensation, liability, property, indemnity, directors and officers, automobile, etc.
Attachments

- 31: Financial Plan Workbook
- 32: Budget Narrative
- 33: Evidence of other Financial Support
- 34: Audit Report
- 35: Credit Report
- 36: IRS Form 990, Form 990-N, or Form 990-EZ
- 37: Plan for Insurance Coverage

Evaluation criteria

A strong response will:

- Identify the fiscal year for the charter applicant and the charter school.
- Outline sound systems, policies and processes for financial planning, accounting, purchasing, and payroll, including a description of how the financial team will establish and maintain strong internal controls, ensure compliance with all financial reporting requirements, and conduct independent annual financial and administrative audits.
- Differentiate the roles and responsibilities of the school’s administration and governing board for school finances.
- Present clear plans for public adoption of the school’s budget and public dissemination of its annual financial and compliance report (AFR).
- Provide a rationale for each proposed service to be contracted, identify the professional qualifications that will be required for each vendor, and detail specific costs, timelines, and selection processes for all prospective vendors.
- Present complete, realistic, and viable start-up and five-year operating budgets.
- Present a detailed budget narrative that clearly explains reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions that identify the amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable).
- Present Average Daily Attendance (ADA) estimates that are congruent with student enrollment projections.
- Describe all repayment terms for borrowed funds.
- Outline a sound contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.
- Provide evidence to demonstrate the charter applicant has a strong financial record.
- Describe fundraising plans that include goals, timelines, and responsible individuals.
- Present a sound plan to acquire liability insurance.