REQUEST FOR QUALIFICATIONS FROM NEW OPERATORS
Evaluation Criteria

ISSUED AUGUST 9, 2012

LETTERS OF INTENT DUE SEPTEMBER 9, 2012
PROPOSALS DUE OCTOBER 5, 2012

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TIMELINE	
RFQ Release	**August 9, 2012**
Orientation Sessions for Prospective Applicants	**August 15, 2012**
Letters of Intent Due	**September 9, 2012**
Submissions Due	**October 5, 2012**
Application Evaluation and Due Diligence Reviews	**October 8- 19, 2012**
Applicant Capacity Interviews	**October 25-26, 2012**
Recommendations to the Board	**November 1, 2012**
Board Decisions	**November 8, 2012**

Evaluators will use the following criteria to rate applicant responses to the Request for Qualifications. Within each section, specific criteria define the expectations for a strong response that "Meets the Standard." Evaluators will rate responses by applying the following guidance:

Rating	Characteristics
Meets or Exceeds the Standard:	The response reflects a thorough understanding of key issues. It clearly aligns with the mission and goals of the EAA; addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant's capacity to carry out the plan effectively.
Partially Meets the Standard:	The response meets the criteria in some respects, but lacks detail and/or requires additional information in one or more areas.
Does Not Meet the Standard:	The response is wholly undeveloped or significantly incomplete; demonstrates lack of preparation; is unsuited to the mission of the EAA or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.

Recommendations from the Evaluation Team will be based on evaluation of the written application (narrative and attachments), independent due diligence, and the applicant interview. **In addition to meeting the criteria that are specific to that section, each part of the proposal should align with the overall mission, budget, and other sections of the application**.

School Overview

This section is not rated separately by the evaluators. It provides the evaluators with a reference for each of the other sections of the application which will be assessed, in part, for the quality of alignment with the School Overview.

Section 1. Educational Program Design & Capacity

A strong Educational Program Design is aligned internally, as well as with the school's mission and vision, Operations Plan, and Financial Plan.

Education Program
A strong description of the Education Program will have the following characteristics:

Program Overview
This section is not "rated" by the evaluators; however, all other sections of the Education Program will be evaluated for alignment with the overview.

Curriculum and Instructional Design
- Framework for a rigorous, quality instructional design that reflects the needs of the school's target population and will ensure all students meet or exceed the expectations of the Michigan Curriculum Standards aligned with the Common Core State Standards.
- Comprehensive, quality curriculum overview that includes a sample course scope and sequence for one subject for one grade for each division (elementary, middle, high school) the school would serve, and demonstrated alignment of course outcomes with the Michigan Curriculum Standards and Common Core State Standards.
- Sound curricular choices, by subject, including reasonable evidence the curriculum will be appropriate and effective for the targeted students.
- Evidence that the proposed education program has a sound base in research, theory, and/or experience, and has been or is likely to be rigorous, engaging, and effective for the anticipated student population.
- Sound instructional strategies and explanation of why they are well-suited for the anticipated student population, including effective methods and systems for providing differentiated instruction to meet the needs of all students.

Pupil Performance Standards
- Clear, rigorous learning standards (provided for one grade for each division the school would serve) and exit standards aligned with the Michigan Curriculum Standards and Common Core State Standards.
- *(If applicable)* Thoughtful identification of and plan for development and adoption of any additional academic standards beyond the Michigan Curriculum Standards that the school would adopt or develop, including explanation and evidence of how those standards would exceed the state standards.
- Clear, rigorous promotion and exit policies and standards.

High School Graduation Requirements *(High Schools Only)*
- Sound plan for meeting the Michigan Merit High School Graduation Requirements (including credits, GPA calculation, transcripts, electives) and compelling explanation of any additional requirements beyond the state's are explained at:
  http://www.michigan.gov/documents/mde/New_MMC_one_pager_11.15.06_183755_7.pdf

- Clear, persuasive explanation of how the school's graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).
- Effective systems and structures for students at risk of dropping out or not meeting graduation requirements.

School Calendar and Schedule
- School calendar and sample daily and weekly schedules that meet minimum Michigan requirements (at least the equivalent of 180 days of 6.5 hours of instruction), align with the educational program, and are conducive to significantly improving student learning.

School Culture
- Vision for school culture or ethos that will promote a positive academic environment and student intellectual and social development for all students, including those with special needs, English Language Learners, and students at risk of academic failure.
- Coherent plan for establishing and maintaining the intended culture for students, teachers, administrators, and parents from the first day of school, and for acculturating students who enter the school mid-year.
- Articulate, compelling descriptions of the typical daily experiences of a student and a teacher in grades served in year one. Descriptions demonstrate a well thought-out school design that reflects the vision and will support student intellectual and social development.

Supplemental Programming
- *(If applicable)* Sound plan, design, schedule, and funding for summer school that will meet anticipated student needs.
- Well-designed plans and funding for extracurricular and co-curricular activities, programs, and services that will meet anticipated student needs and provide enrichment experiences.
- Thoughtful, well-supported description of programs or strategies to address student mental, emotional, and social development and health, and any other student-focused activities and programs that are integral to the school's educational and student-development plans.

Special Populations and At-Risk Students
- Demonstrated understanding of – and capacity to fulfill – state and federal obligations and requirements pertaining to students with disabilities and English Language Learners including appropriate discipline procedures for students with disabilities.
- Sound explanation of evidence from which the projection of anticipated special populations was derived.
- Viable plan to identify students with special needs and ensure that they have access to the general education curriculum, are integrated in ways that support their development, receive necessary services, participate in standardized testing, and are included in all educational, extracurricular, and culture-building activities.
- Realistic plan for ELL students that includes a curricular program for students who may not be ready for the general education curriculum, outlines a process for providing students access to the general education curriculum, identifies instructional and intervention strategies and programs, and includes students in standardized testing and educational or culture-building activities.
- Plans describe evidence-based instructional programs and practices; effective design or adaptation of the educational program; qualified staffing; and support strategies and resources.

Student Recruitment and Enrollment

- Sound and thoughtful student recruitment and marketing plan, timeline, and Enrollment Policy that will provide equal access to all interested students and families, including those in poverty, academically low-achieving students, students with disabilities, and other youth at risk of academic failure.
- Enrollment Policy complies with EAA policy and state law including the provisions of Part 6A of the Revised School Code, MCL 380.504(3).

Student Discipline
- Student discipline policy that provides for appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture while respecting student rights. Legally sound policies for student discipline, suspension and expulsion, as well as appeals, including proper processes for students with disabilities.
- Appropriate plan for disseminating the discipline policy to teachers, parents and students.

Parent and Community Involvement
A strong description of the plan for Parent and Community Involvement will have the following characteristics:

- Effective strategies for informing parents and the community about the school's development.
- Sound pre- and post- opening parent engagement plan, including family-school partnerships, that is welcoming and accessible to all parents.
- (*only applicable if the applicant has already engaged the community*) Existing community resources and partnerships that will benefit students and parents and that include a) description of the nature, purposes, terms, and scope of services of any such partnerships; and b) evidence of commitment from identified community partners.

Educational Program Capacity
A strong description of the capacity to implement the Educational Program will have the following characteristics:

- Evidence that the leadership team has the collective qualifications (documented by resumes and bios for all members) to implement the school design successfully, including capacities in areas such as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent and community engagement.
- Evidence that organizations, agencies, or consultants that are essential to successful implementation of the plan are committed to having an ongoing role with the school.
- *(If School Leader candidate is identified)* Evidence of the leader's experience in/ability to design, launch, and lead a school that effectively serves the target population, as well as evidence that the proposed leader is well qualified to implement the specific educational program being proposed. Any identified leadership training is appropriate for and aligned with the educational program.
- *(If School Leader candidate is not yet identified)* Evidence of the Board's preparation and plan to recruit and retain a leader with the ability to lead a school that effectively serves the target population.
- Appropriate responsibilities and qualifications of the school's leadership/management team (beyond the school leader).
- *(If members of the leadership team are identified)* Individuals who demonstrate the qualifications, capacities, and commitment to carry out the designated leadership roles to ensure the success of the proposed school.
- *(If leadership team is not yet identified)* Sound timeline, criteria, and process for recruiting and hiring the leadership team.
- Sound plan for leading the development of the school from post-approval to opening, including identification of a capable individual or team to lead the planning and start-up, as well as a viable plan for compensating this individual or team.

Section 2. Operations Plan & Capacity

A strong Operations Plan is aligned internally, as well as with the school's mission and vision, Educational Program, and Financial Plan.

Governance
A strong description of the plan and capacity for Governance will have the following characteristics:

Legal Status and Governing Documents
- Proposed school's legal status and structure are in compliance with state law.
- Effective governing bylaws.
- *(If provided)* Effective policies and procedures.

Organization Charts
- Clear, sensible, complete organization charts depicting the school governance, management, and staffing structure in <u>Year 1</u> and <u>at full expansion</u>, delineating sound assignment of roles and responsibilities – and clear lines of authority among – the board, all management staff, any related bodies or councils, and any external organizations that will play a management role. The charts should also present clear lines of authority and reporting within the school.
- Sound, clear plan for managing the relationship between the governing board and school administration.

Governing Board
- Effective governance structure and planned board size, powers, duties, and current and desired composition (including diverse expertise and effective representation that will foster school success.
- Proposed board members who demonstrate *(as documented by resumes, bios, and Board Information sheets for all currently-identified proposed members):* (a) will, capacity and commitment to govern the school effectively; and (b) shared vision, purposes and expectations for the school.
- Evidence that the proposed governing board members will contribute the wide range of knowledge, skills, and commitment needed to oversee a successful charter school, including educational, financial, legal, and community experience and expertise.
- *(If applicable)* Sound, timely plan for creating or transitioning to the school governing board.
- Procedures for board member selection that are likely to produce a strong, committed board with desirable range of expertise.
- *(If application is being submitted by an existing non-profit organization)* Sound plan for transforming existing board to assume its new duties or forming a new board. *(If planning to use an existing board)* Thoughtful plan for maintaining existing board that will minimize conflicts of interest, ensure appropriate attention is devoted to charter school governance, and will ultimately support the operations of a high quality charter school.
- Other effective governance procedures, including planned frequency of meetings and standing committees.
- Appropriate proposed Code of Ethics and Conflict of Interest policy/procedures will minimize real or perceived conflicts.
- Sound plan and timeline for board recruitment, expansion, orientation of new members, and ongoing training for members. Plan should include a thoughtful identification of desired experience and capacities.

Advisory Bodies
- Clear roles, duties, and composition of any advisory bodies/councils, and effective relationship to the school governing board and leadership.

Grievance Process

- Fair, accessible grievance process for parents and students.

School Management Contracts *(If applicable)*
- Thoughtful consideration and rationale for selecting the educational service provider (ESP), explaining why the ESP is a strong choice and good fit for the proposed school and community.
- Clear delineation of roles and responsibilities between the board and the ESP including services and resources to be provided by the ESP; performance evaluation measures and mechanisms; ESP compensation; financial controls and oversight; methods of contract oversight and enforcement; investment disclosure; and conditions for renewal and termination of the agreement.
- Demonstrated board capacity, and commitment to overseeing the ESP effectively, including the internal controls that will guide the relationship, and how the governing board will ensure fulfillment of performance expectations.
- The services arrangement is free of conflicts of interest, and there is a viable plan for identifying and managing potential conflicts.

Staffing
A strong description of the Staffing plan will have the following characteristics:

Staff Structure
- Staffing plan aligned with the educational program and conducive to the school's success.
- Staff responsibilities clearly defined and appropriately aligned with the described school design.
- Effective structure and strategies for managing the administration-staff relationship.

Staffing Plans, Hiring, Management, and Evaluation
- Compensation packages, system, and strategy that are likely to attract and retain strong staff.
- Recruitment and hiring strategy, criteria, timeline, and procedures that are likely to result in a strong staff that meet ESEA requirements for being "Highly Qualified", certification requirements as required by the state board and Michigan Revised School Code MCL 380.505, and are well suited to the school.
- Plan for supporting, developing, and annually evaluating school leadership and teachers that is likely to produce and retain a successful staff.
- *(If leadership and/or teacher evaluation tools are included)* Evaluation tools that are likely to be effective.
- Effective planning for unsatisfactory leadership/teacher performance and turnover.

Professional Development
- Professional development standards, opportunities, leadership, and calendar/scheduling that effectively support the education program and are likely to maximize success in improving student achievement, including an induction program that will prepare teachers to deliver any unique or particularly challenging aspects of the educational program.

Performance Management
A strong description of the Performance Management plan will have the following characteristics:

- *(Optional)* Meaningful mission-specific educational and/or organizational goals and targets, which are measurable or demonstrable by externally credible measures or assessments.
- Quality interim assessments that are aligned with the school's curriculum, performance goals, and state standards.

- Effective plan (including qualified personnel) and system for measuring and evaluating academic progress – of individual students, student cohorts, and the entire school – throughout the school year, at the end of each academic year, and for the charter term.
- Comprehensive, effective plan (including qualified personnel) and system for collecting and analyzing student academic achievement data, using the data to refine and improve instruction – including providing training and support to school leadership and teachers – and reporting the data to the school community.
- Thoughtful, appropriate corrective actions the school will take if it falls short of the EAA's (or the operator's) student academic achievement expectations or goals at any level, including explanation of what would trigger such actions and who would implement them.

Facilities
A strong description of the Facilities plan will have the following characteristics:

Part A. EAA Facilities
(*for operators proposing to locate in facilities over which the EAA has jurisdiction based on identified EAA priorities and availability*).

- Complete response to EAA facilities needs assessment (Facilities, Part A.) aligned with the educational program and anticipated student population.

--OR--

Part B. Independent Facilities
(*For operators intending **not** to use an EAA facility*).

- Sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility that will meet the requirements of the educational program and anticipated student population.

Start-Up & Ongoing Operations
A strong description of the plan for Start-Up & Ongoing Operations plan will have the following characteristics:

- Detailed start-up plan specifying tasks, timelines, and responsible individuals, which is aligned with sound Start-Up Budget.
- *(If the school will provide transportation)* Sound plan for student transportation, including both daily and special-event transportation.
- Sound plans for school and student safety and security, including security personnel, technology, equipment, and policies.
- Plan to secure comprehensive and adequate insurance coverage, including workers' compensation, liability, property, indemnity, directors and officers, automobile, and other.

Operations Capacity
A strong description of the capacity to implement the Operations Plan will have the following characteristics:

- Individual and collective qualifications for implementing the Operations Plan successfully, including capacity in areas such as staffing, professional development, performance management, school start-up, general operations, and facilities management.
- *(If proposing an independent facility)* Demonstrated experience in facilities acquisition and management, including managing build-out and/or renovations.

Section 3. Financial Plan & Capacity

A strong Financial Plan is aligned internally, as well as with the school's mission and vision, Educational Program, and Organization Plan.

Financial Plan

A strong description of the Financial Plan will have the following characteristics:

- Draft financial procedures policy or other reasonable assurance that the operator will have sound systems and processes for accounting, purchasing, payroll, and independent annual school-level and network-level financial and administrative audits.
- Sound criteria and procedures for selecting contractors for any administrative services.
- Complete, realistic, and viable start-up and five-year operating budgets.
- Detailed budget narrative that clearly explains reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions, including identifying 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).
- Sound contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.

Financial Management Capacity

A strong description of the capacity to implement the Financial Plan will have the following characteristics:

- Individual and collective qualifications for implementing the Financial Plan successfully, including capacity in areas such as financial management, fundraising and development, and accounting
- Documents sufficient financial capacity to deliver and maintain optimum services prior to the receipt of the initial state aid payment in October.