



EDUCATION ACHIEVEMENT
AUTHORITY of Michigan

REQUEST FOR QUALIFICATIONS FROM EXISTING OPERATORS
*Interested in operating one or more charter schools beginning in
the 2013-14 school year*

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

*Please direct all questions to Judith K. Berry, Assistant Chancellor, Instructional
Support and Educational Accountability at berryj9@michigan.gov*



EDUCATION ACHIEVEMENT AUTHORITY of Michigan

Education Achievement Authority of Michigan
3022 West Grand Boulevard
Suite 14-652
Detroit, MI 48202

Re: Replicating High Performing Charter/Contract School Programs through the Education Achievement Authority of Michigan

Dear Colleague:

This letter of invitation is being sent to high performing charter schools and networks to extend an extraordinary opportunity to you and to ascertain your interest in working with the Educational Achievement Authority of Michigan.

The Education Achievement Authority of Michigan (“EAA”) was created in August, 2011 through a groundbreaking agreement between the Board of Regents of Eastern Michigan University and the School District for the City of Detroit to establish a statewide system of schools to radically transform teaching and learning in Michigan’s Priority schools. One of the primary goals of the EAA is to create opportunities for new and innovative schools to take root in Michigan with the first group of schools scheduled to open in Detroit in the fall, 2012. We are committed to providing charter and contract schools with total flexibility and autonomy for school operations, curriculum design, teaching methodology and strategies, and other applicable decision making authority to achieve statistically significant increases in measureable student academic achievement as determined by the EAA and approved by its governing board. With this goal in mind, we are extending to you an invitation to join us for an informational meeting on August 15, 2012 beginning at 1:30 pm at the EAA Office located at 3022 West Grand Boulevard, Suite 14-652, Detroit, Michigan.

During this meeting, we will share information on the Education Achievement Authority of Michigan, provide an overview of our goals and objectives, share critical information about the application process and answer any questions you may have. Please RSVP to Ms. Arese Robinson via email at robinsona10@michigan.gov or call 313.456.3755. Thank you in advance for your time and interest in this most important work. We look forward to seeing you August 15, 2012.

Sincerely,

J. Wm. Covington, Ed. D.,
Chancellor



This document was developed by the National Association of Charter School Authorizers (NACSA) for Michigan's Education Achievement Authority and meets NACSA's standards for quality charter school authorizing.

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2012 Request for Qualifications for Experienced Operators

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INTRODUCTION

In August 2011 the Board of Regents of Eastern Michigan University and the School District for the City of Detroit established an agreement representing a bold initiative to provide public school children and families stronger educational opportunities. Through the Education Achievement Authority (“EAA”), Michigan is now turning around the lowest achieving schools in the state.

The EAA is a key component of Michigan’s strategy to increase student achievement in urban and rural schools. The EAA uses a portfolio strategy to manage schools and improve student achievement. In accordance with its status as a charter school authorizer, the EAA is pleased to invite submission of qualifications from non-profit organizations seeking to open quality charter schools in Fall 2013 or later. This invitation is also intended for educational service providers (“ESPs”) and charter management organizations (“CMOs”) that are interested in being considered to contract with EAA chartered public school academy boards.

This Request for Qualifications (RFQ) seeks existing operators interested in replicating a charter school. Existing operators are those applicants intending to find or develop a facility separate from that in which a priority school – as identified by the state – is located, OR intending to operate in a priority school side-by-side with the existing school and without any students assigned to the proposed school. No students will be assigned to a school established by a new operator. Enrollment is by affirmative choice of eligible families.

Automatic Waivers of State Statutes and Rules

By submitting this application, the applicant requests a waiver of all education statutes and rules of the State Board or Department of Education, except those listed in sections 170 to 177 of 1931 PA 327, MCL 450.170 to 450.177.

TIMELINE

RFQ Release

August 9, 2012

**Orientation Sessions for
Prospective Applicants**

August 15, 2012

Letters of Intent ("LOI") 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

APPLICATION INSTRUCTIONS

The Proposal Narrative section of this Request for Qualifications (RFQ) seeks information about all major aspects of:

- the school design;
- the operation plan;
- the financial plan; and
- the school network/replication plan and capacity; and
- the performance of schools currently or previously operated by the applicant and/or proposed service providers.

Specifications

- Applicants **MUST** submit applications using the following templates as provided:
 - Letter of Intent Template (MS Word Document)
 - Proposal Overview and Enrollment Projection Template (MS Word Document)
 - Proposal Narrative - Use the RFQ Outline (MS Word Document)
 - Portfolio Summary template (MS Excel Document)
 - Charter School Board Member information Sheet Template (MS Word Document)
 - Statement of Assurances Template (MS Word Document)
 - Financial Plan - – Use the RFQ Outline and Budget Template (MS Word Document)
- All elements of the proposal must be typed with 1-inch page margins and 12-point font, single-spaced, in the designated spaces in the templates
- Each major section (Executive Summary, Founding Group & School Leaders, etc.) must begin on a separate page, as indicated in the template document. Do not exceed 75 pages for the proposal narrative. (Attachments are not included in the narrative page limit.)
- If a particular question does not apply to your team or proposal, simply respond “Not Applicable,” AND state the reason this question is not applicable to your team or proposal.
- All required attachments should be clearly labeled.
- The following is a list of attachments to accompany the application:
 1. Leadership Team and Governing Board Resumes and Biographies
 2. Course Scope and Sequence and the relationship to the common core
 3. Academic and Exit Standards and the relationship to the common core
 4. School Calendar and Schedule
 5. Enrollment Policy
 6. Student Discipline Policy
 7. Evidence of Support from Community Partners
 8. Principal Candidate Resumes and Biographies
 9. School Administrator Resumes and Biographies
 10. Organization Annual Reports and Business Plan
 11. Organization Charts
 12. Articles of Incorporation, Non-Profit and Tax Exempt Status, Board Bylaws and Policies
 13. Statement of Assurances
 14. Board Member Information Sheets
 15. Code of Ethics and Conflict of Interest
 16. ESP Documentation
 17. Position Descriptions
 18. Personnel Policy

19. Principal and Faculty Evaluation Tools
20. Draft Facility Agreement
21. Description of Proposed Facility
22. Start-Up Plan
23. Insurance Coverage
24. Detailed Budget Forms
25. Budget Narrative
26. Portfolio Summary
27. School Reports/Evaluations
28. School Financials
29. Operator Financials
30. Litigation Documents

- When submitting resumes and biographies, label each document with the individual's affiliation with the proposed school (board member [nonprofit corporations only], principal, teacher, etc.).
- Complete all sheets in the Financial Plan Workbook.
- Review all elements of your application for completeness before submitting.
- Late submissions will not be accepted.

Submission Instructions

1. Prepare your application using this document as the framework. Develop the application content in standard MS Word format.
2. To be eligible to submit a full proposal for the 2013-2014 school year cycle, potential applicants **must first submit the LOI, School(s) Proposal Overview, and Applicant Eligibility by 5:00pm ET on September 9, 2012.**
3. Once the above documents have been submitted, applicants may submit a full proposal, which will include seven (7) (including original), and a flashdrive that includes the narrative, all templates and attachments. Completed applications must be submitted to Judith K. Berry, Assistant Chancellor, Instructional Support and Educational Accountability at Education Achievement Authority, 3022 West Grand Boulevard, Suite 14-652, Detroit, MI 48202 by 5:00 pm ET on October 5, 2012.

PROPOSAL COVER SHEET & ENROLLMENT PROJECTION

Primary Contact. Identify the **primary point of contact** for your team. This individual will serve as the contact for all communications, scheduling, and notices regarding your application. The Primary Contact should ensure that your team receives all general communications promptly.

Note: As with all aspects of your application, names and contact information of the Primary Contact will become public information.

Proposed authorizer: _____

Primary contact person: _____

Mailing address: _____

Street/ PO Box

City

State

Zip

Phone: (day) _____ (evening) _____

Email address: _____ **Fax:** _____

Local or intermediate school district where the public school academy will be located (if known):

Primary contact for facilities planning: _____

Phone Number: _____ **E-mail:** _____

Name of team or entity applying: _____

Names, roles, and current employment of all persons on applicant team (you may add lines as needed):

Full Name	Current Job Title and Employer	Position with Proposed School

***Does this applicant team have charter school applications under consideration by any other authorizer(s) in the United States?** Yes No

If yes, complete the table below, adding lines as needed.

State	Authorizer	Proposed School Name	Application Due Date	Decision Date

Provide the name and desired opening year for each school included in this proposal (adding lines as needed).

Proposed School Name	Opening Year	City or Geographic Community	Opening Grades	Grade Levels at Full Enrollment

Model or Focus of Proposed Schools (e.g., Arts, Career and Technical, College Prep, Dual Language, etc.):

***Do any proposed schools intend to contract or partner with charter management organization (CMO) or other education service provider (ESP) for school management/operation?**

Yes No

If yes, identify the ESP or other partner organization: _____

Proposed Principal / Head of School Information (for all school(s) proposed to open in 2013; add additional lines as needed):

Name of proposed Principal Candidate: _____

Name of School: _____

Current employment: _____

Daytime phone: _____ Cell phone: _____

Email: _____

School Enrollment Projection

Provide the following information for **each school** included in this proposal. Specify the planned year of opening for each (*duplicating the table as needed.*)

School Name: _____

Academic Year	Planned Number of Students	Maximum Number of Students	Grade Levels Served
Year 1 (specify)			
Year 2			
Year 3			
Year 4			
Year 5			
At Capacity (specify year)			

PROPOSAL NARRATIVE

Please respond to all of the following questions. Limit your total narrative response, for all sections, to 60 pages, excluding attachments.

School Overview

The School Overview should provide a concise overview of the targeted community(ies) and your community engagement to date; the description and address for the proposed physical plant in which the public school academy will be located ; the school design being proposed for replication; the replication or network growth plan; and the applicant’s performance record and capacity to execute the plan successfully. The Executive Summary should address the following:

Mission and Vision for Growth in Michigan. State the mission and vision of the proposed school(s) and network as a whole. Provide an overview of the organization’s¹ strategic vision and five-year growth plan for developing new schools in Michigan including years of opening; number and types of schools (grade levels); and projected numbers of students. Briefly describe the targeted city(ies) or community(ies) and explain how each school would meet identified needs in its respective community.

Anticipated Population and Educational Need. Describe the anticipated student population, including geographic preferences (if applicable); students’ anticipated educational needs; and non-academic challenges the school is likely to encounter. Describe the rationale for selecting the location and student body. Identify any enrollment priorities on which the program is based consistent with applicable restrictions on enrollment eligibility and selection.

Educational Plan/School Design. Provide an overview of the education program proposed for replication, including key non-negotiables of the education model. Briefly explain the research base and performance record that demonstrate the school model will be successful in improving academic achievement for the targeted student population.

Community Engagement. Describe your approach to community engagement when opening a school. Describe any outreach you have conducted -- and the relationships you have established – to engage students, parents, and the community for the school(s) proposed in this application. If possible, provide evidence of support among parents, students, teachers, or any combination thereof. Describe the plan for future community engagement including any community meetings, parent/teacher/student input, surveys of prospective stakeholders, etc. you plan to conduct.

Leadership and Governance. For any school intending to open for the 2013-14 school year, identify the school’s proposed leadership team and governing board. (Add lines to this table as needed.)

Full Name	Current Job Title and Employer	Position with Proposed School/School Name

¹ **Note:** The terms “organization” and “network” as used throughout this RFQ apply to any applicant or partnership among groups applying to replicate a school model. Thus, they may include an existing school or group of schools proposing to replicate; an existing school network or charter management organization (CMO) applying directly for a charter; a governing board proposing to contract with a CMO or other education service provider (ESP); or other entities and arrangements. *In the case of an applicant proposing to contract or partner with a service provider, applicants should provide requested information for both entities if applicable.*

Provide, as **Attachment 1**, full resumes (including contact information) and professional biographies for the individuals named.

Enrollment Summary.

Complete the following table for each school to open in 2013-14, You may duplicate the table as needed. Remove any rows for grades the school will not serve as needed in each table.

Grade Level	Number of Students					
	Year 1 20__	Year 2	Year 3	Year 4	Year 5	At Capacity 20__
Pre-K						
K						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan illustrated above.

Section 1: Educational Program Design & Capacity

Education Program

Describe the design and plan for each school for which you are applying, responding to all of the questions in the subsections below. If you are applying for multiple schools designed around the same model, simply state so.

Program Overview

Summarize the education program, including primary instructional methods and assessment strategies, and any non-negotiable elements of the school model(s). Briefly describe the evidence that promises success for this program with the anticipated student population.

Curriculum and Instructional Design

Propose a framework for instructional design that both reflects the needs of the anticipated population and ensures all students will meet or exceed the expectations of the Michigan Curriculum Standards aligned with the Common Core State Standards (available at: <http://corestandards.org/>).

- Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure for all divisions (elementary, middle, high school) to be served.
- Provide an overview of the planned curriculum, including, as **Attachment 2**, a sample course scope and sequence for one subject for each division the operator would serve. Identify course outcomes and demonstrate alignment with the Michigan Curriculum Standards and Common Core State Standards.
- Summarize curricular choices, by subject, and the rationale for each. Include examples of how these choices align with the mission of the operator, and discuss evidence that these curricula will improve academic results with the anticipated student population. Discuss any substantial variations from the curricula in your established schools and the rationale for those variations.
- Describe instructional strategies that the operator will implement to support the education plan and why they are well-suited for the anticipated student population. Describe the methods and systems teachers will use to provide differentiated instruction to meet the needs of all students.
- Discuss the rationale for the proposed educational program, including evidence of results, especially with comparable student populations, as available. (You may refer to your response to Section 4, "Portfolio Review & Performance Record.")
- Describe any key educational features that will *differ* from the operator's existing schools not already discussed above. Explain why you would implement these different features, any new resources they would require, and the rationale for the variation in approach.

Pupil Performance Standards

Responses to the following items regarding the proposed operator's pupil performance standards must be consistent with the Michigan Curriculum Standards and Common Core State Standards.

1. Describe the pupil performance standards for the school(s) on the whole.

Provide, in **Attachment 3**, a complete set of the operator's proposed learning standards for one grade in each division the operator will serve. Address the skills and knowledge each student will be expected to attain by the end of that grade. If the school(s) will serve only one division, the exit standards provided in response to question 5 in this section will suffice.

2. If you plan to adopt or develop additional academic standards beyond the Michigan Curriculum Standards, explain the types of standards (content areas, grade levels). Describe the adoption or development process that has taken place or will take place. Select one grade level and subject area as an example, and explain how these additional standards exceed the Michigan Curriculum Standards.
3. Explain the policies and standards for promoting students from one grade to the next. Discuss how and when promotion and graduation criteria will be communicated to parents and students.
4. Provide, in **Attachment 3** the school's exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do.

High School Graduation Requirements and Postsecondary Readiness (*High Schools Only*)

High schools will be expected to meet the Michigan Merit High School Graduation Requirements (explained at:

<http://www.michigan.gov/documents/mde/New MMC one pager 11.15.06 183755 7.pdf>).

- Explain how the school will meet these requirements. 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. If graduation requirements for the school will exceed those required by the State of Michigan, explain the additional requirements.
- Explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).
- Explain what systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements.

School Calendar and Schedule

1. Discuss the annual academic schedule for the school. Explain how the calendar reflects the needs of the educational program. In **Attachment 4**, provide the school's proposed calendar for the first year of operation, including total number of days/hours of instruction.
2. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social

studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade. Your response should include, in **Attachment 4**, a sample daily and weekly schedule for each division of the school.

School Culture

1. Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.
2. Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for acculturating students who enter the school mid-year.
3. Explain how the school culture will take account of and serve students with special needs, including students receiving special education services, English Language Learners, and any students at risk of academic failure.
4. Describe a typical school day from the perspective of a student in a grade that will be served in your first year of operation.
5. Describe a typical day for a teacher in a grade that will be served in your first year of operation.

Supplemental Programming

1. If summer school will be offered, describe the program(s). Explain the schedule and length of the program, including the number of hours and weeks. Discuss the anticipated participants, including number of students and the methods used to identify them. What are the anticipated resource and staffing needs for these programs?
2. Describe the extra- or co-curricular activities or programming the school will offer; how often they will occur; and how they will be funded.
3. Describe the programs or strategies to address student mental, emotional, and social development and health.
4. If applicable, describe any other student-focused activities and programs that are integral to the educational and student-development plans.

Special Populations and At-Risk Students

Schools are responsible for hiring licensed and endorsed special educators pursuant to law. School personnel shall participate in developing Individualized Education Programs (IEPs); identify and refer students for assessment of special education needs; maintain records; and cooperate in the delivery of special education instruction and services, as appropriate.

1. Describe the overall plan to serve students with special needs, including but not limited to those with Individualized Education Programs or Section 504 plans; English Language Learners; students identified as intellectually gifted; and students at risk of academic failure or dropping out. Identify the special populations and at-risk groups that the school expects to serve, whether through data related to a specifically targeted school or neighborhood or more generalized analysis of the population to be served. Discuss how the course scope and sequence, daily schedule, staffing plans, and support strategies and resources will meet or be adjusted for the diverse needs of students.
2. Explain more specifically how you will identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible. Specify the programs, strategies, and supports you will provide, including the following:
 - a. Methods for identifying students with special education needs (and avoiding misidentification);
 - b. Specific instructional programs, practices, and strategies the school will employ to provide a continuum of services; ensure students' access to the general education curriculum; and ensure academic success for students with special education needs;
 - c. Plans for monitoring and evaluating the progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student's goals as set forth in the Individualized Education Program (IEP);
 - d. Plans for promoting graduation for students with special education needs (high school only); and
 - e. Plans to have qualified staffing adequate for the anticipated special needs population.
3. Explain how the school will meet the needs of English Language Learner (ELL) students, including the following:
 - a. Methods for identifying ELL students (and avoiding misidentification);
 - b. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students;
 - c. Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services;
 - d. Means for providing qualified staffing for ELL students.
4. Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports you will provide for these students.
5. Explain how the school will identify and meet the needs of intellectually gifted students, including the following:

- a. Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities;
- b. Plans for monitoring and evaluating the progress and success of intellectually gifted students; and
- c. Means for providing qualified staffing for intellectually gifted students.

Student Recruitment and Enrollment

- a. Explain the plan for student recruitment and marketing that will provide equal access to interested students and families and comply with Section 504 of Michigan’s Revised School Code (MCL 380.504). Specifically describe the plan for outreach to families in poverty; academically low-achieving students; students with disabilities; and other youth at risk of academic failure.
- b. Provide, as **Attachment 5**, the school Enrollment Policy, which should include the following:
 - a. Tentative dates for the application period and enrollment deadlines and procedures, including explanation of how the school will receive and process Intent to Enroll forms;
 - b. A timeline and plan for student recruitment/engagement and enrollment;
 - c. An explanation of the purpose of any pre-admission activities for students or parents; and
 - d. Policies and procedures for admissions, student waiting lists, withdrawals, re-enrollment, and transfers.

Student Discipline

- 1. Describe the philosophy of student discipline that supports your school model. Discuss how parents will be informed of the school discipline policy.
- 2. Provide, as **Attachment 6**, the school discipline policy, which should include the following:
 - a. Practices the school will use to promote good discipline, including both penalties for infractions and incentives for positive behavior;
 - b. A preliminary 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.

Parent & Community Involvement

- 1. Describe the role to date of any parents and community members involved in developing the proposed school.
- 2. Describe how you will engage parents and community members and how you will provide the general public adequate notice that a public school academy is being created and adequate information on the admission policy, criteria, and process.
- 3. Describe how you will engage parents in the life of the school (in addition to any proposed governance roles described in Section 2 below). Explain the plan for building family-school partnerships that strengthen support for learning and encourage parental involvement. Describe

any commitments or volunteer activities the school will seek from, offer to, or require of parents.

4. Discuss the 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 student learning opportunities. Include, as **Attachment 7**, existing evidence of support from intended community partners such as letters of intent/commitment, memoranda of understanding, and/or contracts.

Educational Program Capacity

1. For any school expected to open for the 2013-14 school year, identify the key members of the school and management team's leadership. Identify *only* individuals who will play a substantial and ongoing role in school development, governance and/or operation, and will thus share responsibility for the school and/or network's educational success. These may include current or proposed governing board members, school leadership/management, charter management organization ("CMO"), education service provider ("ESP"), and any essential partners who will play an important ongoing role in the school's development and operation.

Describe the team's individual and collective qualifications for implementing the school design successfully, including capacity in areas such as:

- a. School leadership, administration, and governance;
- b. Curriculum, instruction, and assessment;
- c. Performance management; and
- d. Parent and community engagement.

Describe the group's ties to and/or knowledge of the target community.

2. Describe the operator's current or planned process for sourcing and training potential school leaders for schools opening in subsequent years. Explain how you have developed or plan to establish a pipeline of potential leaders for the network as a whole. If known, identify candidates already in the pipeline for future positions.
3. Identify any organizations, agencies, or consultants 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. Identify the principal/head of school candidate for each school projected to open in 2013-14 and explain why this individual is well-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 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 is currently participating in. Also provide, as **Attachment 8**, the resume and professional biography for this individual. Discuss the evidence of the leader's ability to effectively serve the anticipated population.

If no candidate has been identified, provide the job description or qualifications and discuss the timeline, criteria, and recruiting and selection process for hiring the school leader.

5. Describe the responsibilities and qualifications of the school's leadership/management team beyond the principal/head of school. If known, identify the individuals who will fill these positions and provide, as **Attachment 9**, the resumes and professional biographies for these individuals. If these positions are not yet filled, explain the timeline and process for recruitment and hiring, and provide the job description or qualifications for these positions.
6. Explain who will work on a full-time or nearly full-time basis immediately following assignment of a location to lead development of the school(s) and the plan to compensate these individuals.

Section 2. Operations Plan & Capacity

Provide the following information about the organization or network growth plan and capacity to carry out that plan with quality and integrity.

Network Vision, Growth Plan, & Capacity

1. Describe the organization or network strategic vision, desired impact, and five-year growth plan for developing new schools in Michigan and other states, if applicable. Include the following information, regardless of school location: proposed years of opening; number and types of schools; any pending applications; all currently targeted markets/communities and criteria for selecting them; and projected enrollments.
2. If the existing portfolio or growth plan includes schools in other states, explain specifically how Michigan fits into the overall growth plan.
3. Provide evidence of organizational capacity to open and operate high quality schools in Michigan and elsewhere in accordance with the overall growth plan. Outline specific timelines for building or deploying organizational capacity to support the proposed schools.
4. Discuss the results of past replication efforts and lessons learned – including particular challenges or troubles encountered; how you have addressed them; and how you will avoid or minimize such challenges for the proposed schools.
5. Discuss the greatest anticipated risks and challenges to achieving the organization’s desired outcomes in Michigan over the next five years and how the organization will meet these challenges and mitigate risks.
6. Provide, as **Attachment 10**, the organization’s annual reports for the last two years and any current business plan for the organization or network.

Network Management

1. Identify the organization’s leadership team and their specific roles and responsibilities.
2. Explain any shared or centralized support services the network organization will provide to schools in Michigan. Describe the structure, specific services to be provided, the cost of those services, how costs will be allocated among schools, and specific service goals. How will the organization measure successful delivery of these services? (In the case of a governing board proposing to contract with a management organization, service goals should be outlined in the term sheet and draft contract which will be provided in **Attachment 16**).
3. Using the table below, summarize school- and organization-level decision-making responsibilities as they relate to key functions, including curriculum, professional development, culture, staffing, etc.

Function	Network/Management Organization Decision-Making	School Decision-Making
Performance Goals		
Curriculum		
Professional Development		
Data Management and Interim Assessments		
Promotion Criteria		
Culture		
Budgeting, Finance, and Accounting		
Student Recruitment		
School Staff Recruitment and Hiring		
H/R Services (payroll, benefits, etc.)		
Development/ Fundraising		
Community Relations		
I/T		
Facilities Management		
Vendor Management / Procurement		
Other operational services, if applicable		

4. Provide, as **Attachment 11**, the following organization charts:
 - a) Year 1 network as a whole (including both network management and schools within the network)
 - b) Year 3 network as a whole
 - c) Year 5 network as a whole
 - d) Year 1 school-level organization chart for the proposed 2013-14 school
 - e) School-level organization chart at full expansion for the proposed 2013-14 school.

The organization charts should clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the governing board, staff, any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the schools. The school-level organization charts should likewise present clear lines of authority and reporting within the school. If the school intends to contract with a charter management organization or other education service provider, clearly show the provider's role in the organizational structure of the school. Explain how the relationship between the governing board and school administration will be managed.

Governance

Legal Status and Governing Documents

Describe the proposed school's legal status, including non-profit status as prescribed by the nonprofit corporation act, 1982 PA 162, MCL 450.2101 to 450.3192, except that a public school academy corporation is not required to comply with sections 170 to 177 of 1931 PA 327, MCL 450.170 to 450.177. Provide evidence of your federal tax-exempt status. Provide the following in **Attachment 12**: a copy of the Articles of Incorporation for the entity proposing to hold the charter (if filed), bylaws, proof of non-profit status and tax exempt status (or copies of your filings for the preceding items), as well as copies of the proposed board bylaws and policies. As **Attachment 13**, provide a completed and signed Statement of Assurances.

Governing Board

1. Explain the governance philosophy that will guide the board, including the nature and extent of involvement by key stakeholder groups.
2. Describe the governance structure at both the network and individual school levels.
 - a. Will each school/campus have an independent governing board, or will there be a single network-level board governing multiple schools? If there will be a network-level board, discuss the plan for satisfying the statutory requirement that a parent of a child at each school serve on the governing body.
 - b. Describe the size and composition (current and desired) for each board. Explain how the proposed governance structure and composition will help ensure that there will be active and effective representation of key stakeholders.
 - c. Discuss the powers and duties of the governing board(s). Identify key skills, areas of expertise, and constituencies that will be represented on the governing board(s).
 - d. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; and b) the board will evaluate the success of the school and school leader.
3. List all current and identified board members and their intended roles (adding rows as needed).

Full Name	Current Job Title and Employer	Position

Summarize members' interests in and qualifications for serving on the school's board. In **Attachment 14**, provide a completed and signed Board Member Information Sheet for each proposed Board member. Include resumes and professional biographies where needed (if a board member's resume is attached elsewhere in this application, state so on the Information Sheet).

4. If the current applicant team does not include the initial governing board, explain how and when the transition to the formal governing board will take place.

5.

If this application is being submitted by an existing non-profit organization:

- Will the charter ultimately be held by the existing non-profit or a different non-profit board? If the latter, explain the transition.
- If the existing board will govern the proposed school(s), discuss the plan to transform that board's membership, mission and bylaws to bylaws to support the charter school expansion/replication plan. Describe the plan and timeline for completing the transition and orienting the board to its new duties.
- If a new board will be formed, describe how and when the new board will be created and what, if anything, its ongoing relationship to the existing non-profit's board will be.

6. Explain the procedure by which board members have been and will be selected. How often will the board meet? Discuss the plans for any committee structure.

7. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Provide, as **Attachment 15**, the board's proposed Code of Ethics and Conflict of Interest policy.

Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

8. Describe plans for increasing the capacity of the governing board. How will the board expand and develop over time? How and on what timeline will new members be recruited and added, and how will vacancies be filled? What are the priorities for recruitment of additional board members? 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. If there will be a network-level board, identify any board development requirements relative to the organization's proposed growth and governance needs.

Advisory Bodies

Describe any advisory bodies or councils to be formed, including the roles and duties of that body. Describe the planned composition of the advisory body; the strategy for achieving that composition; the role of parents, students, and teachers (if applicable); and the reporting structure as it relates to the school's governing body and leadership.

Grievance Process

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.

School Management Contracts

If the applicant does not intend to contract with a charter management organization ("CMO") or other education service provider ("ESP"), mark "Not Applicable" and skip to next section.

If any proposed school intends to contract with a (CMO) or other ESP for school management, provide the following information (and include the requested documentation in **Attachment 16**):

1. An explanation of how and why the ESP was selected;
2. A term sheet setting forth the proposed duration of the contract; roles and responsibilities of the school governing board, the school staff, and the service provider; scope of services and resources to be provided by the ESP; performance evaluation measures and mechanisms; detailed explanation of compensation to be paid to the provider; financial controls and oversight; methods of contract oversight and enforcement; investment disclosure; and conditions for renewal and termination of the contract;
3. A draft of the proposed management contract, including a provision that the ESP will annually submit to the board the same information that a school district is required to disclose as outlined in law for the most recent fiscal year the information is available;
4. Explanation of the relationship between the school governing board and the service provider, specifying how the governing board will monitor and evaluate the performance of the service provider, the internal controls that will guide the relationship, and how the governing board will ensure fulfillment of performance expectations;
5. Disclosure and explanation of any existing or potential conflicts of interest between the school governing board and proposed service provider or any affiliated business entities; and

Human Capital

Network-wide Staffing

Complete the following table indicating projected staffing needs for the entire network over the next five years. Include full-time staff and contract support that serve the network 50% or more. Change or add functions and titles as needed to reflect organizational plans.

Year	Year 1	Year 2	Year 3	Year 4	Year 5
Number of elementary schools					
Number of high schools					
Total schools					
Student enrollment					
Management Organization Positions					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
Total back-office FTEs					
Elementary School Staff					
Principals					
Assistant Principals					
Add'l School Leadership Position 1 [specify]					
Add'l School Leadership Position 2 [specify]					
Add'l School Leadership Position 3 [specify]					
Classroom Teachers (Core Subjects)					
Classroom Teachers (Specials)					
Student Support Position 1 [e.g., Social Worker]					
Student Support Position 2 [specify]					
Specialized School Staff 1 [specify]					
Specialized School Staff 2 [specify]					
Teacher Aides and Assistants					
School Operations Support Staff					
Total FTEs at elementary schools					
High School Staff					
Principals					
Assistant Principals					
Deans					

Add'l School Leadership Position 1 [specify]					
Add'l School Leadership Position 2 [specify]					
Add'l School Leadership Position 3 [specify]					
Classroom Teachers (Core Subjects)					
Classroom Teachers (Specials)					
Student Support Position 1 [e.g., Social Worker]					
Student Support Position 2 [specify]					
Specialized School Staff 1 [specify]					
Specialized School Staff 2 [specify]					
Teacher Aides and Assistants					
School Operations Support Staff					
Total FTEs at high schools					
Total network FTEs					

School Staff Structure

1. Complete the table(s) below outlining your school staffing rollout plan for a “typical” elementary school and/or a “typical” high school, as applicable. Adjust or add functions and titles as needed. Modify the tables, as needed, to reflect variations in school models. If the proposed schools will use a staffing model that diverges from the operator’s norm, please explain.
2. Provide, as Attachment 17, a description of responsibilities of staff included in the table below.

New Elementary School Staffing Model and Rollout

Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Principal						
Assistant Principal						
Add'l School Leadership Position 1 [specify]						
Add'l School Leadership Position 2 [specify]						
Add'l School Leadership Position 3 [specify]						
Classroom Teachers (Core Subjects)						
Classroom Teachers (Specials)						
Student Support Position 1 [specify: i.e., Social Worker]						
Student Support Position 2 [specify]						

Specialized School Staff 1 [specify]						
Specialized School Staff 2 [specify]						
Teacher Aides and Assistants						
School Operations Support Staff						
Total FTEs						

New High School Staffing Model and Rollout

Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Principal						
Assistant Principal(s)						
Dean(s)						
Add'l School Leadership Position 1 [specify]						
Add'l School Leadership Position 2 [specify]						
Add'l School Leadership Position 3 [specify]						
Classroom Teachers (Core Subjects)						
Classroom Teachers (Specials)						
Student Support Position 1 [specify: e.g., Social Worker]						
Student Support Position 2 [specify]						
Specialized School Staff 1 [specify]						
Specialized School Staff 2 [specify]						
Teacher Aides and Assistants						
School Operations Support Staff						
Total FTEs						

1. Explain how the relationship between the school’s senior administrative team and the rest of the staff will be managed. Note the teacher-student ratio, as well as the ratio of total adults to students for a “typical” school.

Staffing Plans, Hiring, Management, and Evaluation

1. Explain the relationship that will exist between the proposed charter school(s) and its employees, including whether the employees will be at-will and whether the school will use employment contracts. If the school will use contracts, explain the nature and purpose of the contracts. Provide, as **Attachment 18**, any personnel policies or an employee manual, if developed.
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. Explain the school’s strategy for retaining high-performing teachers.

3. Describe your strategy, plans, and timeline for recruiting and hiring the teaching staff, including the school's plan for hiring "Highly Qualified" staff in accordance with the Elementary and Secondary Education Act (ESEA). Specifically, explain your plan to use certificated teachers, in accordance with state board rule. If seeking to be authorized by a state public university or community college, describe your plan to use certificated and non-certificated teachers in accordance with Michigan Revised School Code MCL 380.505. Explain other key selection criteria and any special considerations relevant to your school design.
4. Outline the procedures for hiring and dismissing school personnel, including conducting criminal background checks.
5. Explain how the school leader will be supported, developed, and evaluated each school year. Provide, in **Attachment 19**, your leadership evaluation tool(s).
6. Explain how teachers will be supported, developed, and evaluated each school year. Provide, in **Attachment 20**, your teacher evaluation tool(s).
7. Explain how the school and organization intend to handle unsatisfactory leadership or teacher performance, as well as leadership/teacher changes and turnover.

Professional Development

Describe the school and organization's professional development expectations and opportunities, including the following:

1. Who will be responsible for professional development?
2. Discuss the core components of professional development and how these components will support effective implementation of the educational program. Discuss the extent to which professional development will be conducted internally at the school, by the network, or externally and the extent to which it will be individualized or uniform for each teacher.
3. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.
4. Describe 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 accommodate this plan. Include time scheduled for common planning or collaboration, and how such time will typically be used.

Performance Management

The EAA will evaluate the performance of every charter school annually including for "green-lighting" conditionally approved charters for subsequent years and for renewal purposes according to a set of academic, financial, and organizational performance standards that will be incorporated into the charter

agreement. The academic performance standards will consider status, growth and comparative performance based on federal, state, and school-specific measures. The financial performance standards will be based on standard accounting and industry standards for sound financial operation. The organizational performance standards will be based primarily on compliance with legal obligations, including fulfillment of the governing board's fiduciary obligations related to sound governance.

Applicants may propose to supplement the EAA's performance standards with school-specific academic or organizational goals.

1. Describe any mission-specific **educational** goals and targets that the school(s) and/or organization will have. State goals clearly in terms of the measures or assessments you plan to use.
2. Describe any mission-specific **organizational** goals and targets that the school(s) and/or organization will have. State goals clearly in terms of the measures or assessments you plan to use.
3. In addition to the mandatory MEAP test or Michigan merit examination, identify the primary interim assessments the school(s) will use to assess student learning needs and progress throughout the year. Explain how these interim assessments align with the curriculum, performance goals, and state standards.
4. Explain how the organization will measure and evaluate academic progress – of individual students, student cohorts, each school, and the network as a whole – throughout the school year, at the end of each academic year, and for the term of the charter contract.
5. Explain how the school(s) will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. Identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data.
6. Who will be responsible for managing the data, interpreting it for classroom teachers, and leading or coordinating professional development to improve student achievement?
7. Explain the training and support that school leadership and teachers will receive in analyzing, interpreting, and using performance data to improve student learning.
8. Describe the organization's approach to academic underperformance for schools that fall short of student academic achievement expectations or goals at the school-wide, classroom, or individual student level.
9. Describe the organization's plans to monitor performance of the portfolio as a whole. What actions will you take if the network as a whole fails to meet goals? Discuss how the organization assesses its readiness to grow and under what circumstances the organization will delay or modify its growth plan.

Facilities

The EAA's chartering authority derives from its statutory authority to assume the operation of chronically underperforming schools. This RFQ is designed to identify qualified operators who can then be matched with appropriate facilities as schools come under EAA's authority. This section solicits information that will help the EAA match operators with appropriate facilities.

An applicant may also seek to operate in independent facilities. Regardless of the site, however, an EAA charter school must serve exclusively children who were previously attending or are zoned to attend a school that has come under the EAA's jurisdiction.

*If you are seeking an existing public school facility to be identified by EAA, complete **Part A**.*

*If you intend to identify and operate in an independent facility (not managed by EAA), complete **Part B**.*

*If you expect to pursue and acquire a mix of EAA and independent facilities solutions among the proposed schools, **complete both parts**.*

Part A. EAA Facilities

- a. Describe the basic facilities requirements for accommodating your plan, including number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities.
- b. List your anticipated specialty classroom needs, including the number of each type and the number of students to be accommodated at one time. Specialty needs may include but are not limited to the following:
 1. Science labs
 2. Art room (with or without kiln)
 3. Computer labs
 4. Library/media center
 5. Performance/dance room
 6. Auditorium
 7. Other
- c. List your anticipated administrative/support space needs including, anticipated number of each:
 - Main office
 - Satellite office
 - Work room/copy room
 - Supplies/storage
 - Teacher work rooms
 - Other
- d. List which, if any, of the following are essential to fulfillment of the core athletic program:
 - Gymnasium
 - Locker rooms
 - Weight rooms
 - Field(s) (football, soccer, multipurpose)
 - Baseball/softball field

- Other (please list)
- e. Identify any other significant facilities needs not already specified, including:
- Playground
 - Large common space for assemblies and other large group meetings
 - Other special considerations (identify and explain)
- f. Does the applicant have specific desired location(s) from those on the EAA’s Priority Schools List?
 Yes No
 If yes and the applicant has a specific facility under consideration, identify by current school name and/or neighborhood (you may add rows to the table as needed).
- | | |
|----------------------|--|
| Desired Location(s): | |
|----------------------|--|
- g. Is the applicant willing to share a facility with another school?
 Yes No
 If so, identify by school name and/or neighborhood (you may add rows to the table as needed).
- | | |
|----------------------|--|
| Desired Location(s): | |
|----------------------|--|
- h. Discuss contingency plans in the event you do not receive your desired facility.

Part B: Independent Facilities

Schools operating in independent facilities may only enroll students who currently attend or are zoned to attend an EAA school.

If you intend to operate a new-start school in an independent facility (not managed by EAA), describe the process for identifying and securing a facility, including any brokers or consultants you are employing to navigate the real estate market, plans for renovations, timelines, financing, etc. If you currently hold a facility or have a memorandum of understanding or other proof of intent to provide a facility, please provide proof the commitment as **Attachment 19**. Briefly describe the facility including location, size, and amenities. You may provide, as **Attachment 20**, up to 10 pages of supporting documents providing details about the facility. Charter school facilities must comply with health and safety requirements (per MCL 380.503(6)(m)(ix)). In addition, charter school applicants must be prepared to follow applicable city planning review procedures.

Start-Up & Ongoing Operations

1. Provide, as **Attachment 22**, a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals. This plan should align with the Start-Up (Year 0) Budget.
2. If the school will provide transportation, describe the transportation arrangements for prospective students. In addition to daily transportation needs, describe how the school plans to meet transportation needs for field trips and athletic events.
3. Provide the school plan for safety and security for students, the facility, and property. Explain the types of security personnel, technology, equipment, and policies that the school will employ.

4. Provide, as **Attachment 23**, a list of the types of insurance coverage the school will secure, including a description of the levels of coverage. Types of insurance should include workers' compensation, liability, property, indemnity, directors and officers, automobile, and other.

Operations Capacity

Describe the team's individual and collective qualifications for implementing the Operations Plan successfully, including capacity in areas such as the following:

- a) Staffing;
- b) Professional development;
- c) Performance management;
- d) General operations; and
- e) Facilities management.

Applicants intending to use an independent (non-district) facility should describe the organization's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

Section 3. Financial Plan & Capacity

Financial Plan

(No limit to budget narrative; include as Attachment 25)

For multi-site operators or networks, the Achievement School District requires individual **school** and **network-level** financial budgeting, reporting, and annual audits. Each school's finances must thus be transparent and distinct from the network level.

1. Describe the systems and processes by which the organization and school(s) will manage accounting, purchasing, payroll, and audits. Specify any administrative services expected to be contracted; and describe the criteria and procedures for the selection of contractors.
2. Describe how you will provide an independent annual audit of both **organization-level** and **school-level** financial and administrative operations.
3. Provide, as **Attachment 24**, detailed budgets for the operator at the network level AND for EACH individual school. Applicants must provide a network-level budget (no template is provided). Applicants must either complete the Financial Plan Workbook Template (all sections) for the network and each campus, including revenue and expenditure projections that reflect proposed growth and development needs over time, or may submit financial forms in the organization's existing format, provided that they accomplish the following:
 - a. Include a separate budget for each school
 - b. Include a back-office budget
 - c. Specify per-pupil management fees
 - d. Incorporate financial implications of facilities plans
 - e. Explicitly detail major assumptions including but not limited to:
 1. Student enrollment
 2. **All** anticipated funding sources², including:
 - a. Local, state, and federal per-pupil funding; eligibility levels; and annual increases
 - b. Other government resources
 - c. Private fundraising
 - d. eRate
 - e. Student fees
 - f. Compensation (school and network/CMO levels), including:
 - g. Salary table and number of staff by position
 - h. Yearly pay increases
 - i. Pension contribution and other benefits
 3. Line items for each major expense and delineation of assumptions, including:
 - a. Instructional materials and supplies
 - b. School equipment and furniture
 - c. Technology for student and instructional use
 - d. Professional development
 - e. Student assessments

² Note: Both the budget forms and narrative should specify 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 and include evidence of firm commitments, where applicable.

- f. Student information system
 - g. Special education services
 - h. Student activities
 - i. Contracted services at school and network/CMO levels (audit, I/T, PD, etc.)
 - j. Rent and utilities
 - k. Office supplies and equipment
 - l. Technology for administrative use
 - m. Fundraising materials and resources (non-staff)
4. School start-up costs
 5. Management fees and any other management compensation
 6. Facility scenarios
 7. Capital, contingency, and insurance reserve funds

4. Present, as **Attachment 25**, a detailed budget narrative describing assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising).
 - a. Per-Pupil Revenue. Use the figures below in developing your budget assumptions.
 - b. Anticipated Funding Sources. 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 and include evidence of commitment for any funds on which the school’s operation depends.
 - c. Discuss the school/organization’s contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.
 - d. Year 1 cash flow contingency, in the event that revenue projections are not met in advance of opening.
 - Explain how the organization will reach its fundraising goals over the next five years. Provide a development plan that includes staffing needs.
 - Describe the annual audit of the financial and administrative operations of the school and organization. Include evidence that the school will adhere to the accounting, auditing, and reporting procedures and requirements that apply to public schools operating in Tennessee.

Example Budget
Fiscal Year 20XX

	Local Revenues	State Membership	Federal Revenues	Transfers
Revenues:				
Operating Grants				
Fees				
Donations				
Restricted Grants				
TOTAL REVENUE				

Expenses:				
Salaries and Wages				
Fringe Benefits				
Operating Support				
Administrative Fees				
Equipment				
Reserves				
TOTAL EXPENSES				

Financial Management Capacity

Michigan’s funding of public schools is based on the student count conducted on the fourth Wednesday of the academic year. Schools receive 1/11 of their allocated revenue during the third week of October. Applicants must demonstrate their financial capacity to operate prior to the receipt of the initial state aid payment. Describe the team’s individual and collective qualifications for implementing the Financial Plan successfully, including capacity in areas such as the following:

- a) Financial management;
- b) Fundraising and development; and
- c) Accounting.

Section 4. Portfolio Review/Performance Record

Qualification decisions will be based, in substantial part, on the organization's past performance. Provide the following information about schools operated by the organization. ***This section does not require applicants to provide academic performance data for schools operated by the organization. Reviewing performance data is a critical part of the due diligence and evaluation process, and this review will be tailored to the scale and scope of each organization's portfolio. Applicants should expect a supplemental request for information tailored to the history and structure of the applicant organization.***

1. Using the Portfolio Summary Template, provide, as **Attachment 26**, a detailed summary of all of the schools in the operator's portfolio.
2. Select one or more of the consistently high-performing schools that the organization operates, and discuss the school's performance.
 - a. Be specific about the results on which you base your judgment that the school is high-performing. Include student achievement status, growth, absolute, and comparative academic results, as available.
 - b. Discuss the primary causes to which you attribute the school's distinctive performance.
 - c. Discuss any notable challenges that the school has overcome in achieving its results.
 - d. Identify any ways in which the school's success has informed or affected how other schools in the network operate. Explain how the effective practice or structure or strategy was identified and how it was implemented elsewhere in the network.
3. Select one or more of the organization's schools whose performance is relatively low or not satisfactory and discuss the school's performance.
 - a. Be specific about the results on which you base your judgment that performance is unsatisfactory. Include student status, growth, absolute, and comparative academic results, as available.
 - b. Describe the primary causes to which you attribute the school's problems.
 - c. Explain the specific strategies that you are employing to improve performance.
 - d. How will you know when performance is satisfactory? What are your expectations for satisfactory performance in terms of performance levels and timing?
4. *For all schools operating in the state of Michigan*, provide as **Attachment 27**, the most recent performance/evaluation/renewal reports produced by the authorizer(s) (or by a third-party evaluator, if applicable).
5. *For all schools operating in the state of Michigan*, provide the following in **Attachment 28** (a) the last three years of audited financial statements for the school(s); and (b) the most recent internal financial statements, including balance sheets and income statements for the organization and any related business entities. Be sure that the school level, ESP/CMO level, and the overall operations are distinctly represented.

6. For the organization as a whole and any related business entities, provide the following as **Attachment 29**: (a) the last three years of audited financial statements and management letters; and (b) the most recent internal financial statements, including balance sheets and income statements. Be sure that the ESP/CMO level and the overall operations are distinctly represented.
7. List any contracts with charter schools that have been terminated by either the organization or the school, including the reason(s) for such termination and whether the termination was for “material breach.”
8. List any and all charter revocations, non-renewals, shortened or conditional renewals, or withdrawals/non-openings of schools operated by the organization, and explain what caused these actions.
9. Explain any performance deficiencies or compliance violations that have led to formal authorizer intervention with any school operated by the organization in the last three years and how such deficiencies or violations were resolved.
10. Identify any current or past litigation, including arbitration proceedings, by school, that has involved the organization or any charter schools it operates. If applicable, provide in **Attachment 30** (1) the demand, (2) any response to the demand, and (3) the results of the arbitration or litigation.

EXHIBITS

Letter of Intent Form

Charter School Board Member Information Form

Statement of Assurances Form

Letter of Intent Form

LETTER OF INTENT TO RESPOND TO THE EDUCATION ACHIEVEMENT AUTHORITY REQUEST FOR
QUALIFICATIONS TO OPERATE A CHARTER SCHOOL
OPENING IN THE 2013-2014 SCHOOL YEAR

DUE by 5:00 pm ET, September 9, 2012

To be eligible to submit a full proposal for the 2013-2014 school year cycle, potential applicants must first submit the LOI, School(s) Proposal Overview, and Applicant Eligibility by:

5:00pm ET on September 9, 2012.

The information presented in your LOI is non-binding (with the exception of Applicant Eligibility Statement); specific details provided below may be finalized in the proposal submission. Please contact Judith K. Berry, Assistant Chancellor, Instructional Support and Educational Accountability, via phone 313.456.3110 or email: berryj9@michigan.gov with any questions.

Note: As with all aspects of your application, the name and contact information of the Primary Contact will be public information.

INSTRUCTIONS FOR SUBMITTING AN LOI PACKET

1. Prepare your Letter of Intent. Use the sample letter provided in this template as a guide. The LOI must be signed by an authorized representative of your organization.
2. Complete the School Proposal Overview Form provided in this template.
3. Complete the Applicant Eligibility Statement Form provided in this template. The Eligibility Statement must be signed by an authorized representative of your organization. **ESPs and CMOs do not have to submit this statement. Pursuant to the Revised School Code, MCL 380.502(1), only nonprofit corporations can receive charters. However, ESPs and CMOs submitting a LOI and Proposal will allow the EAA to determine which firms have met EAA qualifications for ESPs and CMOs.**
4. Applicants who do not submit the MANDATORY LOI by 5:00pm on September 9 2012, will NOT be eligible to submit a full proposal.

LETTER OF INTENT – Sample Letter

Education Achievement Authority,

<Insert Date Here>

<Insert organization name here> is interested in being considered as a Charter operator authorized by the Education Achievement Authority (EAA) or Educational Service Provider/Charter Management Organization for an EAA public school academy. <Insert organization name here> is committed to improving the educational outcomes for students by launching high-quality schools in partnership with the EAA.

I understand that partnership with the EAA will require us to:

1. Enroll only students geographically zoned for EAA-eligible schools, and
2. Submit a complete RFQ application by 5:00pm ET on October 5, 2012.

We are committed to engaging in this work with the EAA and thank you for your consideration of our organization as a potential partner.

Sincerely,

Name
Organization

SCHOOL(S) PROPOSAL OVERVIEW

Type of school (check all that apply)				
<input type="checkbox"/> Charter School, opening: <input type="checkbox"/> Fall 2013 <input type="checkbox"/> Fall 2014 <input type="checkbox"/> Fall 2015				
Primary Contact Information				
Name				
Address				
Phone				
Email				
Basic Information for School Opening Fall 2013				
Applicant Organization Name				
Proposed School Leader Name (if identified)				
Proposed School Leader's Current Job/Position				
List any Principal/leadership programs the proposed leader is currently enrolled in or has completed (e.g., NLNS, BES, etc.)				
Proposed School Names (add rows as needed)	Opening Year	Geographic Community and/or City	Grades Served Year 1	Grades served at capacity
Proposed School Description				
In 100 words or less, briefly describe the instructional focus of your proposed school				

APPLICANT ELIGIBILITY STATEMENT

Please read the following statements and confirm eligibility:

Part 6A of the Michigan School Code § 380.502 amended states that a public school academy shall be organized under the nonprofit corporation act, 1982 PA 162 and prohibits a public school academy from being organized by a church or other religious organization, or from having any organizational or contractual affiliation with or constitute a church or other religious organization.

- The sponsoring agent for this public school academy is not a church or other religious organization, or have an organizational and does not have a contractual affiliation with or constitute a church or other religious organization.*

The complete Michigan Revised School Code related to Public School Academies is available at the Michigan Department of Education’s Charter Public Schools website: http://www.michigan.gov/mde/0,1607,7-140-6530_30334_40088---,00.html . You can access Part 6A of the Revised School Code by scrolling down to “Laws and Regulations”.

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate. I recognize that any misrepresentation could result in disqualification from the application process or revocation after award. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the organization.

Signature of Application Primary Contact

Date

Signature of CEO of Sponsoring Agent (if different than above)

Date

Charter School Board Member Information Form

(To be completed individually by each proposed charter school board member. All forms must be signed by hand.)

Serving on a public charter school board is a position of public trust and fiduciary responsibility. As a board member of a public school, you are responsible for ensuring the quality of the school program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, each prospective board member must respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

Background

1. Name of charter school on whose Board of Directors you intend to serve:
2. Full name:
Home Address:
Business Name and Address:

Telephone No.:
E-mail address:
3. Brief educational and employment history. (No narrative response is required if resume and professional biography are attached to the application.)
 Resume and professional biography are provided.
4. Indicate whether you currently or have previously served on a board of a school district, another charter school, a non-public school or any not-for-profit corporation.
 Does not apply to me. Yes
5. Why do you wish to serve on the board of the proposed charter school?
6. What is your understanding of the appropriate role of a public charter school board member?
7. Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you have the capability to be an effective board member.
8. Describe the specific knowledge and experience that you would bring to the board.

School Mission and Program

1. What is your understanding of the school's mission and guiding beliefs?
2. What is your understanding of the school's proposed educational program?
3. What do you believe to be the characteristics of a successful school?
4. How will you know that the school is succeeding (or not) in its mission?

Governance

1. Describe the role that the board will play in the school's operation.
2. How will you know if the school is successful at the end of the first year of operation?
3. How will you know at the end of four years if the school is successful?
4. What specific steps do you think the charter school board will need to take to ensure that the school is successful?
5. How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

Disclosures

1. Indicate whether you or your spouse knows the other prospective board members for the proposed school. If so, please indicate the precise nature of your relationship.
 I / we do not know any such trustees. Yes
2. Indicate whether you or your spouse knows any person who is, or has been in the last two years, a school employee. If so, indicate the precise nature of your relationship.
 I / we do not know any such employees. Yes
3. Indicate whether you or your spouse knows anyone who is doing, or plans to do, business with the charter school (whether as an individual or as a director, officer, employee or agent of some entity). If so, indicate and describe the precise nature of your relationship and the nature of the business that such person or entity is transacting or will be transacting with the school.
 I / we do not know any such persons. Yes
4. Indicate if you, your spouse or other immediate family members anticipate conducting, or are conducting, any business with the school. If so, indicate the precise nature of the business that is being or will be conducted.
 I / we do not anticipate conducting any such business. Yes
5. If the school intends to contract with an education service provider or management organization, indicate whether you or your spouse knows any employees, officers, owners, directors or agents of that provider. If the answer is in the affirmative, please describe any such relationship.
 Not applicable because the school does not intend to contact with an education service provider or school management organization.
 I / we do not know any such persons. Yes

6. If the school intends to contract with an education service provider, please indicate whether you, your spouse or other immediate family members have a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, provide a detailed description.
 N/A. I / we have no such interest. Yes
7. If the school plans to contract with an education service provider, indicate if you, your spouse or other immediate family member anticipate conducting, or are conducting, any business with the provider. If so, indicate the precise nature of the business that is being or will be conducted.
 N/A. I / we or my family do not anticipate conducting any such business. Yes
8. Indicate whether you, your spouse or other immediate family members are a director, officer, employee, partner or member of, or are otherwise associated with, any organization that is partnering with the charter school. To the extent you have provided this information in response to prior items, you may so indicate.
 Does not apply to me, my spouse or family. Yes
9. Indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you serve on the school's board. None. Yes

Certification

I, _____, certify to the best of my knowledge and ability that the information I am providing to the authorizer as a prospective board member for _____ Charter School is true and correct in every respect.

_____ Signature

_____ Date

Statement of Assurances

The charter school and the authorizer agree to comply to all of the following provisions: *(Read and check)*

- 1. Recipients operate (or will operate if not yet open) a charter school in compliance with all federal and State laws, including the Michigan Revised School Code, Part 6A Public School Academies, which are applicable to public bodies or school districts MCL 380.502(3)(h) .
- 2. Recipients acknowledge request for and receipt of the waivers documented in the RFQ, unless otherwise indicated in the contract between the charter school and EAA.
- 3. Recipients will comply with Michigan Open Meetings Act (1976 PA 267, MCL 15.261 to 15.275) and the Freedom of Information Act (1976 PA 442, MCL 15.231 to 15.246). 4. Recipients will, for the life of the charter, participate in all data reporting and evaluation activities as requested by the U.S. Department of Education and the Michigan Department of Education; this includes participation in any federal or state funded charter school evaluations or studies, final grant report documentation and financial statements.
- 5. Recipients will comply with federal laws, including, but not limited to, the *Age Discrimination Act of 1975*, Title VI of the *Civil Rights Act of 1964*, Title IX of the *Education Amendments of 1972*, section 504 of the *Rehabilitation Act of 1973*, and Part B of the *Individuals with Disabilities Education Act*.
- 6. Recipients will comply with all provisions of the Non regulatory Guidance—Public Charter Schools Program of the U.S. Department of Education, which includes the use of a lottery for enrollment if the charter school is oversubscribed.
- 7. Recipients shall ensure that a student’s records, and, if applicable, a student’s individualized education program as defined in section 602(11) of the *Individuals with Disabilities Act*, will follow the student, in accordance with applicable law (P.L. 107-110, section 5208).
- 8. Recipients will comply with all provisions of the *No Child Left Behind Act*, including but not limited to, provisions on school prayer, the *Boy Scouts of America Equal Access Act*, the *Armed Forces Recruiter Access to Students and Student Recruiting Information*, the *Unsafe School Choice Option*, the *Family Educational Rights and Privacy Act (FERPA)* and assessments [P.L. 107-110].
- 9. Recipients possess the legal authority to apply for this grant; a resolution or motion has been adopted by the charter school’s governing body that authorizes the submission of this application, including all understanding and assurances contained herein, directing and authorizing the “charter school contact person/administrator” to act in connection with the application and to provide such additional information as required.
- 10. Recipients shall maintain accounting records and other evidence pertaining to costs incurred, with the provision that the records shall be kept available by the grantee during the grant period and thereafter for five full years from the date of final payment. The authorizer must be permitted to audit,

review, and inspect the grantee’s activities, books, documents, papers and other records relating to the expenditures of grant proceeds. The recipient further agrees to comply with all federal and state audit requirements and ensures that arrangements have been made to finance those mandatory audits

- 11. Recipients are required to keep and maintain all equipment purchased with grant funds in accordance with federal law and regulation.
- 12. Recipients will insure equitable program participation, as required under section 427 of the *General Education Provision Act*.
- 13. Recipients will comply with the lower-tier certification covering lobbying and debarment/suspension in 34 CFR Parts 82 and 85.
- 14. Recipients understand that if any findings of misuse of funds are discovered the said funds must be returned to the EAA authorizer and the EAA authorizer may revoke the charter if it deems that the recipient is not fulfilling the academic goals and fiscal management outlined in the charter.

Signature

I, the undersigned, do hereby agree to the assurances contained above.

Signature of Charter School Sponsor Authorized Representative

Date