

The Education Achievement Authority of Michigan

Request for Proposal
Turnaround and New School Operators
Issue date: December 19, 2014
Responses due: January 31, 2015

For Schools Opening Fall 2015 and beyond

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SECTION 1: INTRODUCTION

The Education Achievement Authority of Michigan (EAA) is a school district that is providing a new direction for the education of students. The EAA currently oversees 15 schools in Detroit, including nine elementary/middle schools (three of which are currently charter schools) and six high schools.

The EAA is seeking information from turnaround and new school charter operators interested in taking an active role in providing a new direction for the education of children. The following request for proposal (RFP) provides further details of this request and instructions for providers interested in responding.

1.1 Purpose of request for proposal (RFP)

The EAA is in the process of gathering information from proven charter operators who are interested in serving as turnaround or new school start-up partners. This invitation is intended for individuals, groups, educational service providers (ESPs), and charter management organizations (CMOs) interested in being considered to contract with the EAA to charter a public school academy/academies. For the purpose of this RFP, these groups/individuals will be referred to as “operators” and “public school academies will be referred to as “charters.” The EAA will engage in a process of reviewing proposals submitted by potential operators, engaging community stakeholders, selecting high quality operators and matching those operators with schools in need of a turnaround/start-up strategy.

1.2 Student achievement goals

Within three years of operating a school, the EAA will challenge its turnaround and new school start-up partners to achieve results in the top 50% of schools in Michigan on the following metrics:

Elementary and Middle Schools

- Absenteeism rate
- Median student growth percentiles in English language arts (ELA) and mathematics on Michigan state tests
- Median student growth percentiles in ELA and mathematics for students with disabilities, students eligible for free and reduced lunch, and students with limited English proficiency
- Percentage of students meeting grade level standards in ELA and mathematics on Michigan state tests
- Percentage of 8th graders that have successfully completed a high school-level course (e.g., Algebra)
- Percentage of 8th graders exceeding grade level standards in ELA and mathematics on Michigan state tests
- Percentage of former 8th graders on track to graduate in 4 years at the end of 9th grade

High Schools

- Absenteeism rate
- Median student growth percentiles in English language arts and mathematics
- Median student growth percentiles in English language arts and mathematics for students with disabilities, students eligible for free and reduced lunch, and students with limited English proficiency
- Percentage of students meeting grade level standards in ELA and mathematics on Michigan state tests
- Percentage of students graduating in 4 years
- Percentage of students graduating in 5 years
- Percentage of 5-year cohort that has completed at least one advanced college or career readiness course or exam (e.g., AP, CTE certification)
- Percentage of 5-year cohort that has enrolled in college within 1 year of graduating

These performance expectations may be raised (but not lowered), on a school-by-school basis, to promote continuous improvement. The expectations may also be modified as new data or ways of measuring performance become available. Any changes in methodology or targets will be public and will be made in consultation with authorized operators.

1.3 Timeline and expectations

The proposed schedule of events subject to the RFP is as follows:

Timeline	
Public Notice	December 19, 2014
Letters of Intent Due	January 9, 2015
Open Conference Call/Orientation	January 13, 2015
Submissions Due	January 31, 2015
Submission Evaluation	February 1 – February 21, 2015
Applicant Interview and Presentation	February 21, 2015
Authorization Announcement	February 27, 2015

All submissions must be received electronically and/or postmarked no later than the above deadlines. Submissions received and/or postmarked after the stated deadline will not be considered.

For proper submission of proposals: submit an electronic copy of your application, including all attachments, to: CharterRFP@eaofmichigan.org. A checklist of required attachments and naming conventions for attachments can be found in **Appendix V**.

The following format regulations should also be observed:

- EAA strongly recommends that the application narrative not exceed 100 pages. EAA asks that the applicant submit detailed attachments to support the application narrative.
- Each new application section must begin on a separate page. Please note respective page

limits for each section.

- The application must be typed with minimum 1-inch page margins and 11 or 12 point font.
- Attachments will not count toward the page limit. Please limit attachments to documents expressly requested in the application.
- All required attachments should be clearly labeled. See submission checklist (**Appendix V**) for further details.
- If a specific application question does not apply, please respond “Not Applicable”.

Responses must be submitted both in hard copy by mail and electronic copy by email. Please submit 3 hard copies of your application. Email copies should be sent to:

CharterRFP@eaaofmichigan.org.

Applications should be mailed to:

Attn: Veronica Conforme
Education Achievement Authority of Michigan
300 River Place Drive, Suite 3600
Detroit, Michigan 48207

For assistance or questions:

Questions regarding this RFP should be directed to: CharterRFP@eaaofmichigan.org.

1.4 Interview and presentation

The EAA may elect to interview or schedule a presentation session with charter operators responding to this RFP, as well as to solicit additional information and clarification of the information presented. The decision to interview or schedule a presentation session will be made following review of all RFP responses. The EAA reserves the right to contact listed references, review all publicly available information and to request additional information as deemed necessary.

SECTION 2: SCOPE OF WORK

The EAA is seeking proposals from new and/or existing education service providers and charter management organizations that are able to implement and support High-Poverty, High-Performing Charters that increase the school's effectiveness and promote student learning and achievement.

Authorized RFP respondents will be eligible to:

- Operate a public school academy as defined in Part 6a of the Michigan Revised School Code (1976 PA 267) under the authorization of the EAA;
- Receive support from EAA central team around space procurement, facilities support, technology, transportation, food service, security, and talent/recruitment;
- Receive support from EAA Partners to implement turnaround/new school start-up plans

2.1 Definition of operator responsibilities

Operators will be responsible for meeting all of the following conditions (list is not exhaustive):

- Operators must be capable of making measureable gains in student achievement over a relatively short period of time (3 years)
- Operators must demonstrate the capacity to turn around a persistently low achieving school, or establish a high-performing new school in a historically low-performing neighborhood/area
- Operators must be able to support the needs of their individual schools and ensure the recruitment of effective school leadership teams and work with them collaboratively, as well as assist in the recruitment and evaluation of teaching staff
- Operators must work with the school and community stakeholders to design and implement a comprehensive school reform plan
- Operators must have field staff who can work on the ground, directly with school staff
- Operators must be accountable for results through outlined accountability measures, performance monitoring expectations, and impact metrics.
- Operators must collaborates with the school in decision making on school operations and staffing including hiring a new principal or approving the current one and supporting the principal in staffing an effective cohort of new or rehired instructional staff
- Operators must provide support services to all students in turnaround or aligns services with support partners that may sub-contract with.
- Operators must maintains an embedded, consistent, and intense relationship with each school that requires a daily presence in the school during the turnaround period throughout the length of the contract

The EAA will be responsible to negotiate with authorized operators an appropriate/approved level of responsibility for managing and implementing the start-up/turnaround plan.

Some of the terms the EAA and charter operator may decide to negotiate could include the following:

- Establishing a performance contract with the EAA stating the agreed upon accountability

- measures, performance monitoring expectations, and impact metrics
- Meeting the agreed upon performance criteria as stated in the performance contract
- Assuming full responsibility for the school’s performance per terms of the performance contract
- Establishing an embedded presence in the school and maintaining consistent and intensive onsite support
- Assisting charter operator with identifying and hiring a principal and working with school leadership to recruit, hire, and evaluate additional staff members
- Managing the day-to-day operations and needs of the school including directly supporting the principal and other staff on instructional and operational matters
- Discussing progress and barriers with the principal(s) and key stakeholders on a regular basis
- Ensuring that the turnaround plan is implemented with fidelity at the school level
- Providing direct support to or organizing the necessary resources to support target areas: (e.g., evaluation, instruction, leadership, human capital, community involvement) based on identified needs
- All other responsibilities as outlined in the contract between the EAA and the operator

2.2 Expectations for operators and the EAA

All operators will operate in accordance with Michigan Revised School Code (1976 PA 471), the Michigan Department of Education and all pertinent State and Federal regulations. The EAA central team will administer all necessary oversight as required by law and will provide each school with ongoing technical assistance and training throughout the planning and implementation process

2.3 Letter of intent packet (LOIP)

In order to be eligible to submit a full proposal for the 2015-2016 school year cycle, potential turnaround and/or new school start up partners must first submit a LOIP to the EAA by January 9, 2015. The information presented in the LOIP is non-binding (with the exception of applicant eligibility statement). However, the LOIP is mandatory. Submissions received from applicants who do not submit the LOIP will not be considered.

INSTRUCTIONS FOR SUBMITTING THE LETTER OF INTENT PACKET

Included in the LOIP should be the following documents:

1. Letter of intent.
 - Use the sample letter provided in this template as a guide.
 - An authorized representative of the applying organization must sign the Letter of Intent.
2. Applicant proposal overview form provided in this template.
 - Use the included template
 - All pages must be signed by an authorized representative of the applying organization

3. Applicant eligibility statement form
 - Use the included template
 - An authorized representative of the applying organization must sign the eligibility statement.

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). <Insert organization name here> is committed to improving the educational outcomes for students by launching high-quality schools in partnership with the EAA.

We understand that partnership with the EAA will require us to submit a complete RFP proposal by January 31, 2015.

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

APPLICANT PROPOSAL OVERVIEW

The EAA will use the Proposal facts sheet for administrative processing of proposals received.

Proposed Charter School Name:

Model or focus of proposed school: _____

Does the applicant currently have access to a facility suitable for a school? Yes ___ No ___

If yes, proposed school address: _____

Type of Operator(s): *check all that apply*

- Individual(s)
- Nonprofit Corporation
- Other entity (type):

Name of team or entity applying: _____

Operator Primary Contact Person:

First Name: _____ Middle: _____ Last: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Daytime phone: _____ Email: _____

Operator Signature: _____ Date: _____

Operator experience:

Does the applying entity currently operate any other schools?

- Yes
- No

If yes, please complete the following table:

City	Enrollment	Total # of schools	# Elementary schools	# Middle schools	# High schools
Example: Detroit	600	1	1	0	0

Enrollment:

	Grades Served	Total
2009-2010		
2010-2011		
2011-2012		
2012-2013		
2013-2014		

Projected school opening date:

Length of school day: __am to pm Length of school year: __days

Proposed Principal/Head of School Information:

Name of proposed Principal Candidate: _____

Current employment: _____

Daytime Phone: _____ Cell Phone: _____

Email: _____

Applicant Signature: _____ **Date:** _____

References:

List at least three schools that you have managed/supported in the last three years and provide references who can speak to your turnaround work in those schools below:	
School 1	Reference 1
School name:	Name:
School location:	Position:
Number of years working with school:	Organization:
	Phone:
	Email:
	Relationship:
School 2	Reference 2
School name:	Name:
School location:	Position:
Number of years working with school:	Organization:
	Phone:
	Email:
	Relationship:
School 3	Reference 3
School name:	Name:
School location:	Position:
Number of years working with school:	Organization:
	Phone:
	Email:
	Relationship:

Applicant Signature: _____

Date: _____

APPLICANT ELIGIBILITY STATEMENT

Pursuant to the Revised School Code (1976 PA 451), A public school academy shall comply with all applicable law, including all of the following:

- a. The open meetings act, 1976 PA 267, MCL 15.261 to 15.275.
- b. The freedom of information act, 1976 PA 442, MCL 15.231 to 15.246.
- c. 1947 PA 336, MCL 423.201 to 423.217.
- d. 1965 PA 166, MCL 408.551 to 408.558.
- e. Sections 1134, 1135, 1146, 1153, 1263(3), 1267, and 1274.
- f. Laws concerning participation in state assessments, data collection systems, state level student growth models, state accountability and accreditation systems, and other public comparative data collection required for public schools.

The below agreement is required for this application and must be executed by the applicant on behalf of the proposed charter school.

<p>In accordance with the Revised School Code, 1976 PA 451, I/we hereby certify and agree that</p> <p>_____ , a public school academy authorized pursuant to the Revised School Code, will comply with the provisions of the Revised School Code and, with all other state law applicable to public bodies and with federal law applicable to public bodies or school districts.</p> <p style="text-align: center;">_____ Signature of Applicant</p>
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Note: A public school academy shall be organized as a public, non-profit corporation (with by-laws) as directed in the Revised School Code

Assurances

By checking the boxes and signing below, the Applicant indicates his/her understanding and intent to comply with the following pertinent statutory and regulatory requirements. The Applicant acknowledges and certifies that the proposed charter or contract school shall comply with all state and federal laws applicable to the type of school being proposed.

The Applicant acknowledges and certifies that it will comply with all Revised School Code requirements related to admissions and enrollment; specifically:

- The proposed charter school is prohibited from charging tuition
- The proposed charter school cannot discriminate on the basis of intellectual or

- athletic ability, measures of achievement or aptitude, status as a person with a disability, or any other basis that would be illegal, if used by a school district.
- The proposed charter school can limit admissions to pupils within a particular range of age or grade level currently permitted by law.
 - The pupils must be residents of the state of Michigan.
 - Admissions must be open to pupils on a state-wide basis.
 - The proposed charter school will utilize a lottery or other impartial selection process to admit students when demand exceeds capacity.
 - All EAA of Michigan Schools will fully participate in the EAA of Michigan's Assessment Program.
 - All EAA of Michigan Schools will utilize a Student Information System and Human Resources/Financial Software Package that will allow for the seamless and accurate transfer of required data into the EAA of Michigan student information system and other reporting systems for monitoring purposes.
 - All EAA of Michigan Schools will participate in data collection and evaluation activities necessary to assess progress in regards to annual performance metrics.

The proposed charter school is incorporated/will incorporate as a public nonprofit corporation pursuant to the laws of the state of Michigan.

To the extent applicable, the proposed charter or contract school will use assessments recognized by the Michigan Department of Education. To the extent applicable, the progress of the pupils in the charter or contract school shall be assessed using the state approved assessment by the MDE.

The proposed charter or contract school will obtain and submit the necessary Certificate of Use & Occupancy permits issued by the Bureau of Construction Codes to the Authorizer, as well as applicable health and safety approvals as required by the Revised School Code and other applicable law.

I certify that I understand and will comply with all of the above-checked statutory and regulatory requirements within time frames specified by law and by the authorizing contract.

Signature of Applicant

SECTION 3: Proposal Format

The EAA would like RFP respondents to organize their proposal into four sections:

1. Academic Program,
2. Organizational Compliance
3. Finance and Facilities
4. Community Involvement and Support

Please follow the proposal format as it appears in the instructions that follow. Applicants must respond to each section completely and thoroughly.

APPLICATION

3.1 Executive Summary (Max. 5 pages)

The Executive Summary should be a stand-alone document that provides a succinct narrative overview of this application. It should outline the mission statement, vision and focus of the proposed school and should provide an overview of the proposed academic program. The Executive Summary also should provide a brief overview of the applicant's capacity to execute the plan successfully.

The Executive Summary should include the following components:

Mission and Vision: State the mission and vision of the proposed school.

- The mission statement should describe the students who the school will serve, what the school will accomplish, and the methods that will be used to serve the identified population, as well as any unique programs that will support the targeted community or group.
- The vision should describe the school's highest priorities and identify what will be accomplished when the school is successful in executing its mission.

Academic Plan: Provide a summary of the proposal team's educational philosophy, proposed curriculum, and plan to create a positive learning environment where all students are supported.

Operational & Financial Capacity: Describe the proposal team's capacity to manage the operational, governance, and financial aspects of the proposed charter school. Briefly explain the proposal team's background and record of success in operating schools similar to the proposed school. Summarize the five-year growth plan for the proposed school in terms of enrollment, leadership, and staffing.

Target Community: Briefly explain how the proposed school would complement the existing array of educational options in the identified community.

For operators currently running one or more schools, please provide the following additional information in one additional page (total page limit 6 pages).

Portfolio of Existing Schools: Discuss any unique school themes or models in the applicant organization’s portfolio, including academic performance and evidence of improved school culture as well as cultural enrichment, arts and athletic programs. Provide an overview of how many schools are currently in operation by grade level and targeted population, the duration of the schools’ tenure, and student academic achievement. Demonstrate capacity to manage multiple schools, including changes, if any, to the applicant organization’s current management structure.

3.2 Academic Program

The Academic Program section of the proposal should provide an overview of key instructional methods and assessment strategies, and explain the research base that demonstrates the school model will be successful in improving academic achievement for the targeted student population.

Maximum 34 pages (excludes Attachments)

1. **Educational Philosophy** (Maximum of 2 pages)

- a. Explain the school's educational philosophy and articulate the proposed instructional techniques, describing the pedagogy that will be used to support the school's mission.

2. **Curriculum & Educational Plan** (Maximum of 18 pages)

- a. **Curriculum Map and Summary:** Describe the academic program of the school, providing an overview of curriculum objectives and content in each subject area for each grade, as well as a description of how the curriculum meets the requirements established in the Michigan Revised School Code. Please provide supporting curriculum documents for each subject and grade level in an attachment.
- b. **Rationale for Proposed Curriculum:** Describe how and why the curriculum was selected and how it is aligned to the school's mission.
 - i. Present evidence that the proposed educational program is research-based and has been or will be rigorous, engaging and effective for the anticipated student population.
 - ii. Explain why the proposed curriculum is likely to succeed with at-risk students, including students with disabilities, English Language Learner (ELL) students, homeless students, and students who are struggling and/or below grade level.
 - iii. Explain why the proposed curriculum is likely to succeed with gifted students and those who need accelerated learning opportunities. Describe how students will be identified and how services will be provided.
- c. **Specialized Instruction & Student Needs:** Explain in detail how the curriculum/educational program of the proposed school will be differentiated to meet the needs of all enrolled students, including students with special needs and disabilities, English Language Learner (ELLs) , homeless students, economically disadvantaged students, gifted students, and students who are not performing at grade level. Provide details such as course scope and sequence and available student supports, including technology supports, dedicated personnel and special programming.
 - i. How will the school identify at-risk students?
 - ii. How will the school serve and support students with disabilities and ELLs inside and outside of the classroom? An explanation of systems and staff that ensure compliance with relevant federal and state legislation is necessary, but not sufficient, to satisfy this portion of the application. Include a detailed description of the programs that will support these students.

- iii. Given the prevalence of various disabilities throughout the City of Detroit, describe the school's plan for serving the different types of learners that may enroll. How will the school respond to a student who requires programs or services not specifically included in the design of the charter school's education program?
 - iv. How will the school monitor the success of students with disabilities and ELLs, including monitoring progress, exiting students from the services, and providing ongoing monitoring of students who exit special education and ELL services?
 - v. Explain the teaching methods and/or personnel and budgetary decisions that will ensure differentiated instruction for all students. Describe any technology that will be used to facilitate personalized learning.
 - vi. Describe the school's system of support for at-risk students, with a particular emphasis on planned supports for students who are homeless, economically disadvantaged, or performing far below grade level.
- d. **Promotion and Graduation:** Explain the school's policies and standards for promoting students from one grade to the next and how these requirements will be communicated to parents and students.
- i. Provide exit standards for graduating students. Exit standards should clearly set forth what students will know and be able to do when they exit the last grade served by the school.
 - ii. If the school will have a high school, explain how graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce) and comply with Section 380.1278a of the Michigan Revised School Code.
 - iii. Describe the minimum course credit requirements and how they will be distributed across subjects and across grades. How many credits will be required to be promoted from one grade to the next? How will the Michigan Revised School Code be complied with?
- e. **Student Retention (High Schools):** Explain what systems the school will implement for students at risk of dropping out or not meeting the proposed high school graduation criteria within four years.
- i. Describe in detail how students who enter the school with missing credits will be able to make up credits in a timely manner.
3. **School Culture and Climate** (Maximum of 4 pages)
- a. **Learning Environment:** Describe the culture of the proposed school and explain how this culture will promote a positive learning environment and reinforce students' intellectual and social development.
 - i. Describe your plan to create a positive, student-centered learning environment.
 - b. **Extracurricular Activities:** Describe the plan for providing extracurricular activities to students of the proposed school. What types of activities will be provided? Does the applicant plan to have students participating in EAA-run extracurricular activities, or will the proposed charter school run activities of its own?

- c. **Meeting Student Needs:** Describe the school's programs or strategies to address student mental, emotional, and social development and health.
 - i. Describe the school's plan to identify students who may be in need of these services.
 - ii. Explain the staffing model that will provide students with mental, emotional, and social support and demonstrate that the number of staff members will be sufficient to meet student needs.
4. **Academic Data & Goals** (Maximum of 10 pages)
- a. **Goals and Metrics:** Provide the school's academic goals and metrics for the years of the charter term. Goals must be clear and quantifiable, and must demonstrate a commitment to continuous improvement. How will these metrics be used to monitor progress and impact corrective actions?
 - i. List or attach the annual academic performance goals for the proposed charter school.
 - ii. Identify any other measures or assessments (both formative and summative) the school will use to measure academic success.
 - iii. Provide a unified assessment plan that demonstrates how the school will measure and evaluate academic progress of individual students, student cohorts, and the school as whole throughout the year, at the end of each academic year, and for the term of the charter agreement. Explain how these assessments align with the school's mission, curriculum, performance goals, and state standards.
 - b. **Data-Driven Programs and Instruction:** Describe a comprehensive system to review data (including achievement, attendance, and behavior/suspension data) to inform instruction and needed supports.
 - i. How frequently will the school will collect and analyze student academic achievement data? Which school staff member will be responsible for managing this process, and what types of technology will be utilized?
 - ii. How will the school use multiple sources of data to self-assess and design necessary reforms?
 - iii. How will data be used to monitor the achievement gap?
 - iv. How will data be used to help teachers to better serve students who are behind and/or students who require additional rigor?
 - v. How will data be used in decision-making?
 - vi. Explain what might trigger corrective actions and who would be responsible for implementing them.
5. **Communication of Data to Parents & Stakeholders:** What indicators and information will be reported to parents and other stakeholders regarding the individual progress of their children, as well as the progress of the school overall?
- a. How and when will school performance and student performance data be disseminated to parents?

- b. What is the school's plan to review parent complaints, concerns, and questions regarding the school's progress toward its goals as they arise during the school year?
- c. Describe how progress on both academic and non-academic goals will be communicated to other stakeholders such as community members, students, and staff.

3.3 Organizational Compliance

This section provides an overview of the proposed school's leadership, governance, staffing, and organizational plans. The school oversight structure should demonstrate the capacity to handle start-up and operational challenges.

Maximum 35 pages (Excludes Attachments)

1. **Founding Coalition** (Maximum of 4 pages)

- a. **Applicant Capacity:** Describe the makeup of the group or partnership that is working to apply for a charter, including the names of the founding coalition and professional backgrounds and experiences for each.
 - i. Provide evidence as to why the applicants have the collective capacity to successfully perform all tasks needed to turnaround/open a school.

2. **School Leadership** (Maximum of 7 pages)

- a. **Leadership:** Identify the principal/school leader candidate, if known. If unknown, outline a timeline and plans for recruiting, hiring, and developing the principal/school leader.
 - i. Attach a job description for the principal/school leader position.
 - ii. Explain why the identified individual is well qualified to lead the proposed school in achieving its mission. Provide qualifications, resume and professional bio for this individual, if available.
- b. **Leadership Team beyond the Principal:** Identify any other key leadership positions planned for the school.
 - i. Describe the responsibilities and qualifications of the school's leadership/management team. If known, identify the individuals who will fill these positions and provide qualifications, resumes and professional bios for these individuals.
 - ii. Provide an organizational chart showing lines of authority among administrative and school-based staff.
- c. **Recruitment of Teaching Staff:** Outline the school's procedures for hiring and dismissing school personnel, including conducting all federal and state required criminal and child abuse background checks.
 - i. Attach the charter school's hiring and personnel policies.
 - ii. Attach the charter school's organizational chart.
 - iii. Provide a description of the staffing model (for example: students per classroom, teachers and aides per classroom; teacher to student and adult to student ratios).
 - iv. Provide a staffing list that identifies:
 1. Year 1 positions, as well as positions to be added in future years

2. Administrative, instructional and non-instructional personnel
 3. The number of classroom teachers, paraprofessionals, and any specialty teachers
 4. Operational and support staff positions
3. **Leadership and Staff Evaluation and Development** (Maximum of 5 pages)
- a. **Leadership/Staff Evaluation:** Explain how the school will evaluate the performance of the school leader and the faculty.
 - i. Attach any evaluation tools that have already been prepared and/or provide a thorough description of the evaluation system.
 - ii. Explain how the school would handle unsatisfactory leadership or teacher performance, as well as how the school will plan for leadership and teacher changes and turnover.
 - b. **Leadership/Staff Development:** Describe the applicant's plan for supervising, supporting, and developing staff. Describe the improvement process if teacher and staff standards are not met.
 - i. Present a plan for how the school will build human capital within its staff. What types of growth opportunities will be provided for school leaders? How will teachers be supervised and supported and how frequently will they be observed?
 - ii. Describe how professional development will align with the school's mission as well as with the proposed curriculum.
 - iii. Describe the goals of the professional development program for teachers. How will the success of this program be measured?
 - iv. Describe the process for improvement and intervention for teachers and leaders who need additional supports.
4. **School Operations** (Maximum of 5 pages)
- a. **School Calendar:** Attach a copy of the school calendar and identify hours of operation to demonstrate compliance regarding minimum days or hours of instruction per year.
 - b. **Health Care Benefits:** Attach the proposed school's health care benefits plan for school employees. If the health care benefits plan does not provide the same benefits as those provided to EAA employees, provide a letter from the proposed school's benefits consultant explaining why the same health care benefits cannot be provided because of the relative size of the proposed school.
 - c. **School Operations Experience:** Identify the operations team for the proposed charter school. Indicate the team members' experiences and qualifications to operate the school, attaching resumes if available.
 - i. Describe how school operations will be managed. If an external organization will be contracted for the operation of the school, describe why that organization was selected as well as which specific responsibilities will be assigned to the external organization. A copy of the finalized management contract must be submitted with the application.

- d. **School Operations Plan:** Explain how operations services will be delivered to the proposed school, including a specific timeframe and plan, relative cost structure, and the party ultimately responsible for service delivery.
 - i. In Michigan, students aged 6 to 16 must attend school, and each LEA is responsible for tracking and combating truancy. Describe the charter school’s plan for keeping attendance and reporting and combating truancy. Explain which staff member will be the school’s Attendance Designee and detail the school’s process for implementing Truancy Elimination Plans and making truancy referrals.
 - 1. Schools will be required to enter all relevant student information into the EAA’s system of record for enrollment and payments (currently Powerschool). The EAA will provide schools with access to this system. Describe the charter school’s plan for ensuring that these data are up- to-date and accurate.
 - 2. Describe the delivery of services including transportation, food services, student health services, and immunization compliance.
 - a. Describe the process established to review complaints and concerns of parents, students, and teachers regarding the day-to-day operations of the charter school. Include lines of authority and outline steps for a parent or citizen to address the board.

5. **Recruitment, Admissions & Enrollment** (Maximum of 6 pages)

- a. **General Enrollment & Target Populations:** Explain the anticipated demographic characteristics of the population to be served, and provide evidence that the school will achieve and sustain its proposed enrollment figures.
 - i. State the projected enrollment maximums by grade level for each year of the charter term.
 - ii. State the projected racial and ethnic composition, special education, ELL, and free/reduced lunch eligibility rates.
 - iii. Provide data to support the above projections and evidence to suggest that the school will be able to meet and sustain them over the term of the charter.
- b. **Recruitment & Marketing:** Explain the plan for student recruitment and marketing. The plan must provide equal access to any family interested in the new school.
 - i. Provide details about the applicant’s outreach to families in poverty, academically low-achieving students, students with disabilities, ELL students and their families, and other youth at risk of academic failure.
 - ii. The plan should include specific outreach strategies such as partnerships with non-profits, community organizations, parent groups, etc.
 - iii. Describe the venues and mass media outlets the applicant will use to reach a wide variety of students and families.
- c. **Admissions, Lottery, and Enrollment:** Describe the admissions, lottery, and enrollment process the school will use to select students, and provide a timetable to be used for admitting students.

- i. Describe how the school will ensure equal enrollment opportunity to all applicants.
 1. Attach admissions and enrollment policies and/or procedures (ex: admissions, lottery, waiting lists, withdrawals, re-enrollment, and transfers). All policies must be in compliance with state and federal law. Policies and procedures should address the questions below:
 - a. What process does the charter intend to use to back-fill rosters from waiting lists if new spots open after the school year begins?

6. **Student Discipline** (Maximum of 4 pages)

a. Student Discipline and Code of Conduct

- i. Attach a copy of the school's code of conduct. The code must include clear procedures for student suspension and expulsion.
 - ii. Describe how the staff will be trained on implementation of discipline policies. How will the school ensure that the code of conduct does not disproportionately impact students of color, ELLs, or students with disabilities?
 - iii. How will the school take into account the needs and rights of students with disabilities in disciplinary actions and proceedings? Who will be responsible for ensuring compliance with federal laws and regulations governing the discipline of students with disabilities, including manifestation determination reviews?
 - iv. Describe how students and parents will be informed of the school's discipline policies and expectations.
 1. **Due Process:** Describe the school's policy for due process and provision of instruction. Attach a proposed policy and explain how the school plans to provide students with due process and required instruction. Describe due process procedures for suspension and expulsion that comply with the Public School Code.
- b. **Safety Plan:** How will the school address issues of safety at the school? What strategies will be employed to improve the building climate?
- i. Outline the steps that have been taken to formulate a comprehensive school safety plan. Detail how the school safety plan will be reviewed on an ongoing basis.

7. **Board of Directors** (Maximum of 4 pages)

- a. **Board Creation/Transition:** Identify the incorporator of the charter corporation. Explain the role of the applicant in participating in the Board of Directors. If the applicant team is not the initial governing board, explain how and when the applicant will transition leadership to the formal governing board and how the applicant will support the school during start-up and in the longer term. Please attach a copy of the Articles of Incorporation filed with the Michigan Department of State.
- b. **Governance:** Describe how the proposed school will be governed. Explain how the governance and administrative structure is aligned with the school's mission and goals.
 - i. Explain the general philosophy of governance for the proposed school, and include a list of any committees that the board plans to form (for example: governance

- committee, education committee, finance committee, etc.)
- ii. Include copies of the school's proposed by-laws. *Do not attach boilerplate corporate bylaws. The bylaws must be appropriate for the governance of a charter school.*
 - iii. Submit the names and resumes of potential board members. Explain their collective qualifications for governing the proposed school and note whether additional board members are being recruited.
 - iv. Will there be parent representation on the Board of Directors? How many? Voting or non-voting? How will parent representatives be identified and selected for the board?
 - v. How often will the Board of Directors meet? How will parents know when and where?
- c. **Ethics:** Provide detailed information on how the school will ensure that Board members are familiar with and agree to comply with the all Federal, State and Local laws, the Michigan Revised School Code (1976 PA 451), the State of Michigan State Ethics Act, and the Open Meetings Act.
- i. Provide details of board training to be provided.
 - ii. Provide a copy of the proposed school's conflict of interest policy.

3.4 Finance and Facilities

The finance plan should detail financial systems and processes and demonstrate, under realistic revenue assumptions, that the school will remain viable for the length of the charter term. The proposed budget should align with all proposed programming, staffing plans, student enrollment projections, etc. The facilities plan should describe the school's ability to secure and prepare a facility within the allotted timeframe.

Maximum 12 pages (Excludes Attachments)

1. **Finance and Operations** (Maximum of 7 pages)
 - a. **Financial Forms and Narrative:** Develop a preliminary detailed one-year budget and a high level five-year operating budget.
 - i. Provide a budget narrative that clearly describes revenue assumptions. Include information on all revenues that will be available to the school. This should include, but is not limited to, assumptions regarding the charter per pupil rate, assumed enrollment, state funding, and grants/other funding.
 - ii. Provide a budget narrative that clearly describes expenditures assumptions. Detail all major assumptions regarding staffing and benefits costs, debt, facilities and maintenance costs, and other major expenditures.
 - iii. Provide an explanation of how the school would address situations in which the detailed revenue and expenditure assumptions were not realized (e.g. lower than anticipated enrollment, higher than expected facilities costs, higher than expected

- personnel costs, etc.)
- iv. Provide plans or evidence of any additional opportunities for financial support that clearly document how the school will raise the funds detailed in the budget.
- b. **Internal Financial Controls:** Describe plans to ensure fiscal soundness and legal compliance for the proposed school.
 - i. What checks and balances will be in place to ensure the organization's compliance with generally accepted accounting procedures (GAAP) related to managing the financial operations of the school?
 - ii. Provide a set of financial policies and procedures that the organization will use to manage the financial operations of the school. Include the proposed school's internal controls policy.
 - iii. Describe the financial monitoring process that will be used. Specify the reports to be generated and the frequency of these reports, and identify the party responsible for generating and/or reviewing the reports.
 - c. **Insurance Coverage:** Required insurance coverage plans include the following: health, property and general liability, professional liability, automobile, worker's compensation, educator's legal liability, Director and Operator's insurance and tail coverage
 - i. See **Appendix IV** for the EAA's insurance requirements for charter schools, and provide assurances that the proposed school will maintain the minimum level of all required insurance. Identify insurance broker(s) where possible.
 - d. **Fiscal Management:**
 - i. Identify the finance team for the proposed charter school. Provide a job description or resume for key team members, and these individuals' experiences and qualifications to manage the school's finances.
 - ii. If an external organization will be contracted for financial management, describe why that organization was selected as well as which specific responsibilities will be assigned to the external organization.

If the applicant currently manages one or more schools, please respond to the request below.

- e. **Evidence of Fiscal Solvency:**
 - i. Provide the last two years' audited financial statements for the applicant's organization.
 - ii. Provide a narrative of the costs of services provided to schools and fees paid from schools to the applicant.
 - iii. Provide the most recent internal financial statements (at least through the end of May 2014). Provide the same for any and all affiliated/related entities. School level, any CMOs/EMOs, and the overall operations levels should be distinctly represented.

2. **Facility Needs** (Maximum of 5 pages)

- a. **Location and Financing:** Describe the applicant's plan for leasing or purchasing a school facility, which would be ready for full operation of the school prior to the school opening date.
 - i. Please complete the Facility Planning Questionnaire (**Appendix III**).

- ii. If the applicant currently holds or plans to rent or purchase a facility, please describe it. Describe the location of the facility, any plans for renovations, timelines, financing, etc. The charter school facility must comply with all state and local fire, health and safety requirements. Applicants must be prepared to follow applicable city zoning laws.
 - iii. Include details of arrangements that have been made to lease or purchase the facility. Attach a letter of intent from the owner or landlord to demonstrate that the facility will be secured in sufficient time to begin the school year. Provide a detailed timetable of the projected steps and dates leading to the opening of the proposed school.
 - iv. If the applicant has a secondary or back-up facility for the proposed school, provide information about that facility as well as for the primary facility.
- b. **Space Requirements:** Explain how the site is a suitable facility for the school, describing the square footage, total number of classrooms, administrative space, gym, cafeteria, labs, etc. Include a discussion of and timeframe for the renovations that are required to receive a certificate of use and occupancy as a school.
- i. Discuss plans for maintaining the facility on a day-to-day basis (custodial) and extended basis (facility maintenance).

3.5 Community Involvement and Support

Schools with strong community engagement are sensitive to and meet the needs of the students and families in the proposed community. Applicants should demonstrate connections that have been established within prospective communities and provide evidence of the proposed school's capacity to integrate itself into the community that it hopes to serve.

Maximum 12 pages (Excludes Attachments)

1. **Targeted Community** (Maximum of 8 pages)

a. **School Needs:**

- i. Identify the target community and briefly describe current educational options in the vicinity.
- ii. Explain how the proposed school will add to the array of educational options available.
- iii. Will the school consider offering enrollment preference for students residing in a specific catchment area or matriculating from a particular feeder school? If so, explain the details of the enrollment preference and provide a rationale for it.

b. **Community/Local Connections:** Identify the steps taken to assess the educational needs and priorities of families in the community where the proposed school will be located. Describe the anticipated relationship of the charter school to the surrounding community, and vice versa.

- i. Summarize the feedback received from community and civic leaders, families, and other stakeholders. How will the program provided by the proposed charter school meet a need in the community?
- ii. In what capacity will community agencies or other entities work with the proposed charter school? Identify any community organizations and/or community leaders that have expressed support for the proposed school.
- iii. How does the charter school plan to solicit feedback from the community and other stakeholders on school operations, safety, transportation, facilities, etc?

c. **Evidence of Support:** Provide evidence of support from parents and any identified community partners. Provide an honest and thoughtful assessment of demand to enroll.

- i. Evidence should be concrete and specific to the proposed school. For example, evidence could include letters of support/commitment, petitions, non-binding pre-enrollment forms, or minutes and sign-in sheets from community meetings and feedback sessions.
- ii. Memoranda of understanding and/or contracts with community partners should specify the resources to be committed or contributed from the partner, as applicable. If the proposed school will rely on a community partner to provide a service that is integral to the operation of the school, inclusion of a copy of the contract or MOU is strongly encouraged.

2. **Parent Engagement** (Maximum of 4 pages)

a. **Parent Support of Proposed School:** Describe the role of parents and community members involved in developing the proposed school.

- i. How will the school inform parents and the community about the school's development?

- ii. How will the school engage parents in decision-making related to the school's development?
- b. **Parent Engagement Strategy:** Describe parents will be engaged in the life of the school over time, in addition to any proposed governance roles. How will the school build sustainable family-school partnerships to strengthen support for learning?

SECTION 4: Appendixes

Appendix I: Evaluation Criteria

Criteria under which the EAA will evaluate applications include, but are not limited to, the following.

Academic Program narrative contains:

- Thoughtful explanation of educational philosophy and consideration of how proposed pedagogy will successfully serve the intended school population.
- Rigorous curriculum map and exit standards aligned with the Michigan Revised School Code, and discussion of curriculum effectiveness for all students, including students with disabilities, ELLs, students performing below grade level, and gifted students.
- Actionable plan for identifying individual student learning needs and providing differentiated instruction, including credit recovery for high school students. Thoughtful plan for serving students with disabilities in full compliance with applicable state and federal law.
- Cohesive plan to provide a safe, positive, student-centered learning environment, including services for students with social, emotional, or mental health needs and opportunities for extracurricular activities.
- Rigorous academic performance goals, including disaggregated goals as well as both short- and long- term metrics.
- Robust plan for strategic data collection, analysis, and use, including assessment strategy, proposed intervention process, and effective communication of student results to parents and other stakeholders.

Organizational Compliance narrative contains:

- Demonstration of applicant's expertise, skill-set, and record of successful experience necessary to start, manage, and grow a high-performing school.
- Comprehensive job descriptions for principal and other school leaders, and plan for successfully recruiting highly-qualified individuals to those positions (or documentation for any leaders already recruited).
- Organizational chart and staffing model aligned with budget projections and adequate to support the anticipated number of students within the chosen instructional model.
- Description of thoughtful hiring and personnel policies in full compliance with relevant state and federal laws.
- Cohesive and thorough plan for staff supervision, evaluation and continuous development, aligned with school calendar and with school's mission.
- School calendar in compliance with state law, and effective plan for tracking student attendance and reporting truancy.

- Job descriptions for and identification of key operations staff and/or plan for staffing key positions. Process for arranging for transportation, for providing food and health services, and for receiving and managing operational complaints from students, parents, and other stakeholders.
- Admissions processes ensuring equal access for all eligible families. Admissions, lottery, wait-list, withdrawal, re-enrollment, and transfer policies in full compliance with state and federal law.
- Code of conduct aligned with school mission, providing clear expectations for students and processes for suspension and expulsion. Clear plan for ensuring compliance with regulations governing discipline procedures for students with special needs.
- Governance structure aligned with school's mission and clear plan for recruiting a qualified Board of Directors and transitioning to board leadership. Appropriate by-laws, governance policies, and assurances of compliance with relevant state and federal laws.

Finance and Facilities narrative contains:

- Realistic one-year and five-year budgets, aligned with all staffing, facilities, and programming needs. Budget narrative with clear assumptions about revenues and expenditures, as well as explanations of any additional funding source such as grants.
- Strong financial management team or plan to hire key staff and detailed job descriptions.
- Requested financial policies and controls as well as assurances and estimates for all required insurance coverages.
- Identification of a suitable facility or plan to secure such a facility prior to school opening, including a thorough description of facility needs.

Community Involvement and Support narrative contains:

- Recognition of EAA priorities related to neighborhoods in need of high quality school options.
- Description of the needs and priorities of the target community, and explanation of how school will complement existing array of available options.
- Documentation of community engagement and collection of community feedback, demonstrating community support for the school. Thoughtful plan for continuously collecting community feedback during the start-up phase if the new school is approved to open.
- Transparent plan for community role in school development and for parent voice in school decisions. Description of parent engagement program that makes accommodations for parents who are economically disadvantaged and/or non-English speakers.

Appendix III: Facility Planning Questionnaire

Please provide the following information about facilities needs for the proposed school.

General Information:

School name	
Primary contact for facilities	
Phone number	
Email	
Proposed neighborhood	
Proposed grade configuration	
Total # students enrolled at cap	
Number of core classrooms needed:	Yr1: Yr2: Yr3:

Additional Spaces for Students (check ‘Yes’ for those that apply):

Science labs	<input type="checkbox"/> Yes	# of rooms:
Art rooms	<input type="checkbox"/> Yes	# of rooms:
Music rooms	<input type="checkbox"/> Yes	# of rooms:
Computer labs	<input type="checkbox"/> Yes	# of labs:
Library/media center	<input type="checkbox"/> Yes	
Auditorium	<input type="checkbox"/> Yes	
Cafeteria	<input type="checkbox"/> Yes	
Playground	<input type="checkbox"/> Yes	

Administrative/Support Spaces:

Main office	<input type="checkbox"/> Yes	
Private offices	<input type="checkbox"/> Yes	# of offices:
Satellite office	<input type="checkbox"/> Yes	
Teacher work/copy room	<input type="checkbox"/> Yes	
Supply storage rooms	<input type="checkbox"/> Yes	# of storage rooms:

Physical Education/Athletic Needs:

Gymnasium	<input type="checkbox"/> Yes	
Locker rooms	<input type="checkbox"/> Yes	# of locker rooms:
Weight room	<input type="checkbox"/> Yes	
Soccer or football field	<input type="checkbox"/> Yes	Specify type:
Baseball or softball field	<input type="checkbox"/> Yes	Specify type:

Other Space Needs:

Room type	# of rooms needed

Appendix IV: Required Insurance Provisions For Charters

All applicants must acknowledge and agree as part of the charter application that they will maintain the following insurance coverages during the entire term of the charter.

Insurance Requirements

- A. *Commercial General Liability:*
- (a) Commercial General Liability coverage, on an occurrence basis, including Contractual Liability, with limits not less than the following: (a) \$2,000,000 General Aggregate (including bodily injury, or property damage or both); (b) \$2,000,000 Products – Completed Operations Aggregate; (c) \$1,000,000 Per Occurrence; (d) \$1,000,000 Personal and Advertising Injury; (e) \$1,000,000 Fire Damage or Fire Legal Liability; and \$10,000 Medical Expense (any one person).
- B. *Automobile Liability:*
- Automobile coverage with limits not less than the following: \$1,000,000 Combined Single Limit for bodily injury and property damage for all owned autos and/or hired / non-owned autos.
- C. *Workers' Compensation and Employers Liability:*
- (a) Workers' Compensation coverage for its employees with limits not less than the statutory limits for the State of Michigan.
 - (b) Employer's Liability: \$500,000 Each Accident–Bodily Injury by Accident; \$500,000 Each Employee–Bodily Injury by Disease; and \$500,000 Policy Limit–Bodily Injury by Disease. Other states insurance including Michigan.
- D. *Excess /Umbrella Liability:*
- The Charter School shall maintain Excess / Umbrella Liability coverage in an amount not less than 5,000,000 per occurrence. The Excess/Umbrella Policy shall schedule all underlying liability coverages required under the Charter unless a separate 5,000,000 limit is maintained for Professional Liability.
- E. Professional Liability/Educators Liability/ Malpractice/Errors and Omissions Insurance.
- Professional Liability/Educators Liability / Malpractice/Errors and Omissions Insurance with limits not less than the following: (a) \$1,000,000 General Aggregate; (b) \$1,000,000 Per Occurrence. The Charter School shall obtain a Sexual Molestation and Child Abuse Endorsement.
- F. Directors and Officers Liability and Employment Practices Liability:
- The Charter School shall maintain Directors and Officers Liability and Employment Practices Liability Insurance in an amount not less than \$1,000,000.

Appendix V: Application Requirements Checklist

Email completed applications along with the Application Fact Sheet and all other attachments to CharterRFP@eaaofmichigan.org. Please submit all application components according to the naming conventions indicated below.

Application Component	Component Name	Attached?
Application Narrative	[School Initials]_Narrative	
Curriculum	[School Initials]_Attach1_Curriculum	
Academic Performance Goals	[School Initials]_Attach2_AcademicPerformance	
Principal JD (& Bio if available)	[School Initials]_Attach3_PrincipalJD_Bio	
Leadership JD (& Bios if available)	[School Initials]_Attach4_LeadershipJD_Bio	
Hiring & Personnel Policies	[School Initials]_Attach5_Personnel	
Organizational Chart	[School Initials]_Attach6_OrgChart	
Staff List	[School Initials]_Attach7_StaffList	
Staff Evaluation Tool	[School Initials]_Attach8_StaffEval	
School Calendar	[School Initials]_Attach9_SchoolCalendar	
Health Insurance Information	[School Initials]_Attach10_Health	
Operations Staff Info or Admissions & Enrollment	[School Initials]_Attach11_Operations	
Code of Conduct	[School Initials]_Attach12_Admissions	
Safety Plan	[School Initials]_Attach13_CodeConduct	
Articles of Incorporation	[School Initials]_Attach14_SafetyPlan	
By-Laws	[School Initials]_Attach15_AOI	
Board Member Resumes	[School Initials]_Attach16_ByLaws	
Conflict of Interest Policy	[School Initials]_Attach17_BoardResumes	
Budget Template	[School Initials]_Attach18_COIPolicy	
Internal Controls Policy	[School Initials]_Attach19_Budget	
Insurance Assurances	[School Initials]_Attach20_InternalControls	
Audited Financials (if applicable)	[School Initials]_Attach21_Insurance	
Facility Planning Questionnaire	[School Initials]_Attach22_Financials	
Community Support Documents	[School Initials]_Attach23_FacilityPlanning	
MOUs/Contracts (if applicable)	[School Initials]_Attach24_CommunityDocs	
	[School Initials]_Attach25_MOUs	

Please note the following:

- Attachment 22 is required only for applicants who are experienced charter operators.
- Attachment 25 is optional, but is strongly recommended if the applicant plans to rely on a community partner to provide a service that is integral to the operation of the school.