



# **SOUTH CAROLINA STATE DEPARTMENT OF EDUCATION**

1.

## CHARTER SCHOOL APPLICATION EVALUATION RUBRIC

<b>School Name</b>	
<b>Receipt Date</b>	
<b>Hearing Review Date</b>	

**After a charter application is deemed to be complete, the evaluation rubric provides the sponsor with a means of determining the quality of the application. The design criteria and several indicators of quality are provided for each application component.**

## Introduction and Guiding Information

The South Carolina Charter School Application Evaluation Rubric is intended to guide reviewers through an evaluation of the key components and criteria as outlined in the South Carolina Charter School Application Guidance.

When reviewing the applicant’s response to each section, reviewers should determine if the response for each section meets the standard, partially meets the standard, does not meet the standard, or falls far below the standard; each section of the rubric outlines key characteristics of a response that “Meets the Standard.” In the table below, each of the four ratings is defined:

<b>Rating</b>	<b>Definition</b>
Meets the Standard	<i>The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information, presents a clear, realistic picture of how the school expects to operate, and the applicant’s capacity to carry out the plan effectively.</i>
Partially Meets the Standard	<i>The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.</i>
Does Not Meet the Standard	<i>The response meets the criteria in some respects but has substantial gaps in several areas.</i>
Falls Far Below the Standard	<i>The response is undeveloped, or significantly incomplete, or otherwise raises concerns about the sustainability of the plan or the applicant’s capacity to carry out the plan effectively.</i>

Using the provided standards and possible ratings, reviewers should score each section based on the evidence found in the application. Within each section, space is provided for reviewers to indicate areas of strength, areas of weakness, and evidence which may be used to support the assigned rating. Note that evidence should be as factual and objective as possible.

## Section I: Educational Plan and Capacity

Please review the characteristics of a response which Meets the Standard and indicate areas of strength, areas of weakness, and a rating using the definitions provided on page 2 of this document. Please also share evidence below to support your ratings.

1. Evidence of Need and Community Support		A response that “Meets the Standard” will include the following:
1.	Evidence of Need and Community Support	<ol style="list-style-type: none"> <li>1. Evidence that an adequate number of parents or legal guardians with students eligible to attend the proposed school pursuant to S.C. Code Ann. § 59-40-50 support the formation of the charter school and justify the projected per pupil allocation in the application budget. A table indicating interest documented by grade level for the first year of operation is included.</li> <li>2. An explanation of the plan for student recruitment and marketing that will provide equal access to interested students and families. Where possible, specifics such as the types of marketing that will be used, partners who will be engaged, and the number of families who will be reached is also included along with a description of how the plan will reach a diverse group of families.</li> <li>3. A discussion on the type(s) of outreach the charter committee has conducted thus far to make the student population and their families aware of the proposed charter school and the outcomes of this outreach.</li> <li>4. Information on community members, parents, and leaders who publicly support the proposed school and their role in the development of the school and application.</li> <li>5. A concise and detailed discussion of what has been done to assess and build parent and community demand for the school. The response provides an explanation of the plan to continue to engage parents and community members from the present time, to approval, and through opening. If applicable, evidence of engagement such as letters of support or partnership agreements is provided.</li> <li>6. An explanation of the plan to engage parents in the life of the school (in addition to any proposed governance roles described previously). The response describes the plan for building family/school partnerships to strengthen support for learning and encourage parental, student, and community involvement. In addition, the response describes any opportunities and/or expectations for ongoing parent, student, and community involvement.</li> <li>7. A description of any partnerships the school will have with community organizations, business, or other educational institutions. The nature, purpose, 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 is specified.</li> <li>8. <i>If the school is a private school converting to a charter school</i>, a description of the need/evidence in the community to support converting to a charter school is included.</li> </ol>
Areas of Strength:		

**Areas of Weakness:**

**Evidence:**

**Rating:**

**2. Curriculum and Instructional Model**

**A response that “Meets the Standard” will include the following:**

**2.a**

**Instructional Model**

1. An introduction and summary of the educational program to include an overview of the curriculum and instructional design, the guiding educational philosophy, and how the educational program aligns to the mission of the school; included should also be an explanation of how the education program will improve student learning. The response addresses any non-negotiable elements of the school model, including any distinctive learning or teaching techniques to be used. A brief description of the evidence that promises success for this program with the anticipated student population is also included.
2. A description of how the educational program is research-based and data-driven including why the selected curriculum was chosen for the anticipated population of students.
3. An explanation of how the charter school will meet or exceed the academic performance standards and expectations, including how the school will ensure alignment with the academic standards adopted by the State Board of Education.
4. A description of the methods, systems, and development teachers will have available for adapting the curriculum and instruction to meet the needs of all students. The response also includes a description of the school’s Response to Intervention (RtI) plan and what specific social-emotional and academic supports teachers will use to support students, including students i) above or below grade level, ii) with disabilities, iii) identified as gifted and talented, and iv) requiring English Learners (ELLs) services.
5. A discussion of the systems and structures the school will implement for students at risk of dropping out or not meeting grade level or graduation requirements.
6. For a charter school offering high school grades, if applicable: a description of how the school will meet the state’s graduation (exit) requirements to include an explanation of 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 will exceed state and district standards, an explanation of the additional requirements is included.











**Areas of Weakness:**

**Evidence:**

**Rating:**

**4. Goals, Objectives, and Assessment Plan**

**A response that “Meets the Standard” will include the following:**

**4. Goals, Objectives, and Assessment Plan**

1. Goals that are appropriate and manageable and will provide evidence that the school is advancing its mission and meeting the purpose of S.C. Code Ann. § 59-40-20 including closing achievement gaps, as applicable are clearly outlined. Goals should be “SMART” (specific, measurable, attainable, realistic of the school’s mission, and time-based).
2. A summary of test scores, attendance rates, or other data of the residential district which will be used as a baseline or an explanation of how the applicant intends to establish a baseline in the first year of operation (assessment plan to include which assessment(s) will be used and at what point in the school year they will be administered).
3. Strategies to meet the goals and objectives that reference the educational program section.
4. A clear description of the diagnostic, formative, and summative assessments including state-mandated assessments with baseline data gathering and details on the types of assessments. The response includes a discussion of why the assessments were chosen, the plan to administer the selected assessments, and how the results will be used to inform instruction. The response should also address how the data will be used to measure and evaluate academic progress – of individual students, student cohorts, and the school as a whole – throughout the school year, at the end of each academic year, and for the term of the charter.
5. A detailed plan to monitor progress toward meeting the goals and objectives of the school and how the school will make modifications based on data, including revising and redirecting professional development and instruction is included in the response.
6. Clearly identified resources (technology, personnel, staff development) that will be needed to successfully implement the proposed assessment plan such as: who will be responsible for analyzing and interpreting academic data and communicating student achievement data to the board; and who will communicate student achievement data to parents.



## Section II: Organizational Plan and Capacity

Please review the characteristics of a response which Meets the Standard and indicate areas of strength, areas of weakness, and a rating using the definitions provided on page 2 of this document. Please also share evidence below to support your ratings.

1. Governing Board		A response that “Meets the Standard” will include the following:
1.	Governing Board	<ol style="list-style-type: none"> <li>1. Identification of the key members of the founding group/planning committee. <i>Key members are individuals who will play a substantial and ongoing role in the school’s development, governance and/or operation, and thus will share responsibility for the school’s outcomes.</i> The response provides a brief biography of each member, highlighting what experience they bring to the proposed school and any leadership experience and credentials.</li> <li>2. A brief description of how and why the founding group/planning committee decided to form a school in South Carolina.</li> <li>3. A concise description of the model or philosophy of governance that will guide the board (<i>the identified model/philosophy should serve as a guide to the board but this question is not requiring the board to formally adopt a specific model/philosophy</i>).</li> <li>4. A discussion of the governance structure of the proposed school, including the primary roles, powers, and duties of the governing board and how it will interact with and evaluate the school leader. Included is the nature and extent of involvement by key stakeholder groups and an explanation of how the identified structure and composition will ensure that the school will be an educational and operational success and that there will be an active and effective representation of key stakeholders. The response also includes a description of the current and desired size and composition of the governing board. <i>The composition of the board must be aligned with the requirements stated in S.C. Code Ann. § 59-40-50 (B)(9).</i></li> <li>5. A description of how governance will transition from the charter committee to the governing board in the first year of operation.</li> <li>6. The process to appoint or elect new members of the board, including when and in what manner elections will be held that ensure proper participation of parents and/or employees of the school in voting in a manner that is consistent with the school’s by-laws is clearly outlined. The response will include answers to the following questions: 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?</li> <li>7. Clearly outlined plans for building the capacity of the governing board and professional development plans to include what kinds of orientation or training the new board members will receive, and what kinds of ongoing development existing board members will receive. The plan for training and development should include a timetable, specific topics to be addressed, and any requirement to participate.</li> </ol>



		<p>stays the same for the duration of the relationship, including building ownership if the developers are making payments to the EMO/CMO.</p> <ol style="list-style-type: none"> <li>2. A detailed description of the oversight and evaluation methods that the school’s governing board will use to oversee the EMO/CMO; include the supervisory responsibilities of the EMO/CMO (if any), including which school employees the EMO/CMO will supervise, how the EMO/CMO will supervise these employees, and how the charter school board will oversee the EMO/CMO’s responsibilities.</li> <li>3. Evidence is provided that the school’s governing board is independent from the EMO/CMO and self-governing, including evidence of independent legal representation and arm’s-length negotiating.</li> <li>4. Clear description of any existing or potential conflicts of interest between the school’s governing board, proposed school employees, proposed EMO/CMO, and any affiliated business entities.</li> <li>5. Lists all subsidiaries or related entities that are affiliated or owned in whole or in part by the EMO/CMO, and identify the nature of those entities’ business activities and explain whether the school has or will have any relationship with or receive any services from any of the entities listed in the previous question.</li> <li>6. A clear description of, and applicable documentation of any loans, grants, or investments made between the EMO/CMO and the school, including an explanation of how any such loans, grants, or investments may be initiated, repaid, and refused by the school.</li> <li>7. A detailed description of a plan for the operation of the school in the event of termination of the management agreement.</li> <li>8. If the following are not included in the contract (<i>see appendix</i>), the response should address each one accordingly in the narrative: <ol style="list-style-type: none"> <li>a) “If the school’s governing board intends to execute promissory notes or other negotiable instruments, or enter into a lease, lease-purchase agreement, or any other facility or financing relationships with the EMO/CMO, provide evidence that such agreements are separately documented and not part of or incorporated in the school management contract. Any facility or financing agreements must be consistent with the school governing board’s authority and practical ability to terminate the management agreement and continue operation of the school. “</li> <li>b) “Describe the respective financial responsibilities of the school’s governing board and the EMO/CMO. Who will own property purchased with public funds? Which operating and capital expenditures will each party be responsible for? What types of spending decisions can the management organization make without obtaining board approval? What reports must the EMO/CMO submit to the board on financial performance, and on what schedule? How will the school governing board provide financial oversight?”</li> </ol> </li> <li>9. An explanation of the EMO/CMO’s success in serving student populations similar to the target population of the school. As well as, a description of the organization’s demonstrated academic track record as well as successful management of non-academic school functions (e.g., back-office services, school operations, extracurricular programs).</li> <li>10. A listing of all schools currently or formerly operated by the EMO/CMO. Including, identifying those schools that serve the same grade levels and student populations demographically similar to the anticipated population of the proposed school. Include name, year opened, contact information,</li> </ol>
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3. Regardless of the applicant's intention to contract with a third party for transportation services, a description of how the proposed charter school plans to address the transportation needs of its students and, in particular, if the lack of transportation is preventing a child from attending school.

**Areas of Strength:**

**Areas of Weakness:**

**Evidence:**

**Rating:**

### Section III: Business Plan

Please review the characteristics of a response which Meets the Standard and indicate areas of strength, areas of weakness, and a rating using the definitions provided on page 2 of this document. Please also share evidence below to support your ratings.

<b>1. Budget and Finance</b>		<b>A response that “Meets the Standard” will include the following:</b>
<b>1.</b>	<b>Budget and Finance</b>	<ol style="list-style-type: none"> <li>1. A description of the applicant team’s individual and collective qualifications for implementing the Financial Plan successfully, including capacity in the following areas: financial management; fundraising and development; and accounting and internal controls.</li> <li>2. An in-depth discussion on how the proposed budget will support the mission, vision, and educational program of the school. The discussion will include how the proposed 5-year and 10-year budget support the successful implementation of the school’s educational program and increasing student achievement and will highlight any unique instructional strategies or curricular components and how they will be funded. In addition, the discussion will explain the school’s data-driven decision-making process in regards to resource allocations.</li> <li>3. A detailed description of budget assumptions, calculations, and revenue estimates. The narrative should include, at minimum, the basis for revenue projections, staffing levels, and costs; the narrative should also provide specific evidence supporting assumptions and/or describe the source of estimated amounts wherever possible.</li> <li>4. A clear description of any applicable state and federal money funding sources that clearly address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising). The response will indicate the amount and sources of funds, property, or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. and will note which are secured and which are anticipated, and include evidence of commitment for any funds on which the school’s core operation depends.</li> <li>5. A summary of any negotiated services to be provided by the proposed sponsor (local school district, the SCPCSD, or the institution of higher education/technical college), including but not limited to financial accounting, payroll services, food services, custodial services, maintenance, curriculum, library and media services, and warehousing.</li> <li>6. An explanation of how the school will remain fiscally solvent, adhere to generally acceptable accounting practices, have no material breaches, address any financial concerns, and follow the South Carolina pupil accounting system, auditing, and reporting procedures.</li> <li>7. A concise description of how the school will maintain its books and records according to generally accepted accounting principles and will create an appropriate system of internal control.</li> <li>8. A discussion focusing on planned client subcontracts to outside providers (if applicable).</li> <li>9. An outline of the process the school will follow to contract with a certified public accountant to conduct an annual, independent financial audit and to disseminate the results from the audit to the school district and required state agencies.</li> </ol>

		<p>10. An indication if the school plans to offer South Carolina Retirement System benefits to its employees. If so, the response will describe the planning committee’s understanding of the costs and restrictions associated with such benefits and how the school’s budget will absorb applicable costs from year to year.</p> <p>11. A thorough discussion of the school’s contingency plans for cash flow challenges, a budget shortfall, lower than expected student enrollment or other financial challenges in the early years of operation.</p> <p>12. A clear description of the process of how the annual operating budget will be developed and refined each year based on student achievement data and mission driven priorities. The response will explain who will be involved in the process and how the budget may be amended during the year.</p> <p>13. A detailed explanation of the year one [planning year] cash flow contingency plan, in the event that revenue projections are not met (or not met on time).</p>
<p><b>Areas of Strength:</b></p> <p><b>Areas of Weakness:</b></p> <p><b>Evidence:</b></p> <p><b>Rating:</b></p>		
<b>2. Facilities</b>		<b>A response that “Meets the Standard” will include the following:</b>
<b>2.</b>	<b>Facilities</b>	<p>1. A description of the basic facilities requirements for accommodating the school plan, including number of classrooms, square footage per classroom, common areas, overall square footage, and amenities.</p> <p>a) Identified are any other significant facilities needs not already specified, including: playground, large common space for assemblies and other large group meetings, athletic facilities, and other special considerations (identified and explained).</p> <p>2. An explanation of how the facility will meet the needs of students and an assurance is provided that it will be accessible to students with physical disabilities.</p> <p>3. For virtual schools, a plan for maintaining student records and school records, including financial records, at a designated central office of operations is provided.</p> <p>4. If a facility <u>has been identified</u>, the address of the facility, a description of the facility, and the name and address of the owner of the facility is included.</p> <p>a) If entering into a lease agreement, a description of the material terms of the agreement to include what specific buildout is required and what the estimated costs are.</p>

		<p>b) A description of the planning committee’s contingency plan should the lease or planned purchase fall through.</p> <p>5. If a facility <u>has not been identified</u>, specify plan for obtaining such a facility and include a description of the facility needs, a statement as to whether an existing facility will be remodeled or a new facility will be built, and a schedule for completing or obtaining a suitable facility and, if applicable, a description of and timeline for any plan to raise funds for completing or obtaining the facility is included.</p> <p>a) A discussion of the planning committee’s process for obtaining facilities.</p> <p>6. A description how the school’s facilities plan is aligned with the projected enrollment growth outlined in the charter application.</p>
<p><b>Areas of Strength:</b></p> <p><b>Areas of Weakness:</b></p> <p><b>Evidence:</b></p> <p><b>Rating:</b></p>		
<b>3. Insurance Coverage</b>		<b>A response that “Meets the Standard” will include the following:</b>
<b>3.</b>	<b>Insurance Coverage</b>	<p>All of the following documentation should be included in Appendix Item FF:</p> <ol style="list-style-type: none"> <li>1. A description of workers’ compensation insurance and the amounts.</li> <li>2. A description of liability insurance and the amounts to be obtained by the charter school. The minimum policy must cover the limits of the South Carolina Tort Claims Act (S.C. Code Ann. § 15-78-120 (Supp. 2013)).</li> <li>3. A description of the insurance to cover loss to the school building and contents for fire and theft.</li> <li>4. A description of indemnity insurance against civil and criminal liability for the charter school to protect the sponsor, the members of the board of the sponsor, and the employees of a sponsor acting in their official capacity with respect to all activities related to the charter school.</li> <li>5. A description of automobile insurance and both property and liability insurance.</li> <li>6. An indication whether the charter school will obtain any other type, or types, of insurance. For each type, include a description and estimated cost of coverage.</li> </ol>

7. All Insurance Documents—for each type of insurance listed, a statement from a South Carolina–licensed insurance company or the state insurance reserve fund stating the charter school applicant’s ability to secure the insurance and an estimate of the cost of the insurance, if available.

**Areas of Strength:**

**Areas of Weakness:**

**Evidence:**

**Rating:**