Comprehensive Evaluation Team (CET)
Member Evaluation Form

2020 New Schools Request for Proposals

Reviewer Name:

Reviewer Type:
(Generalist or SME)

CPS Department:

Name of Proposed School:

Office of Innovation and Incubation
Chicago Public Schools
42 W. Madison, 3rd Floor
Chicago, IL 60602
(773) 553-1530
(773) 553-1559 (fax)

INTRODUCTION

Thank you for dedicating your time, effort, and expertise to help review proposals for new charter and contract schools submitted in response to the annual New Schools Request for Proposals (RFP). Through your participation as a member of the Comprehensive Evaluation Team (CET) assigned to review this proposal, you will play an integral role in helping to determine final recommendations for new school proposals. The applicants that meet the standards identified in the RFP and demonstrate the capacity to open and manage a high-quality school that will prepare students for success in college, career, and life can be recommended for approval.

EVALUATION STANDARDS & RATINGS

This evaluation form includes the evaluation criteria used to rate the quality of the proposal response for your assigned sections. Rate each evaluation criterion as "meets," "partially meets," or "does not meet" the standard according to the following guidelines:

Meets the Standard: The applicant's response reflects a thorough understanding of key issues and demonstrates the design team's capacity to implement its plan. It addresses the topics with specific and accurate information, aligns with the mission and goals of the school, and presents a clear, realistic picture of how the school expects to operate.

Partially Meets the Standard: The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.

Does Not Meet the Standard: The response demonstrates that the design team does not possess capacity to implement its plan. The response is significantly incomplete, lacks meaningful detail or otherwise raises significant concerns about the viability of the plan or the applicant's ability to carry it out.

High quality proposal responses will include all or most of the characteristics listed underneath the evaluation criterion.

SUPPORTING EVIDENCE

For each section you are assigned, provide evidence, notes, and findings from the proposal that reflect on the criterion identified in the column on the left. Please include findings and notes that enabled you to determine whether an applicant has "Met" or "Not Met" each criterion that you have evaluated. An applicant may meet certain criteria, but still present some concerns or questions about their understanding, capacity, or plan, relative to those criterion. All evidence provided, regardless of particular criterion or overall section ratings (Meets, Partially Meets, and Does Not Meet the Standard) will be used to develop a final Recommendation Report. This Recommendation Report will explain the rationale for the CET's rating of each section.

When citing evidence from the proposal, include page numbers for easy reference.

Domain 1: Parent and Community Engagement and Support

Key Question: Has the applicant conducted robust engagement and garnered authentic parent and community support, establishing a strong foundation for opening and operating a school with engaged and empowered families and communities?

1.1 Community Overview

The applicant has sought to understand the characteristics, background, and history of the students, families, and communities it would serve if approved to open.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Identified possible location(s) for the proposed school(s)	
☐	☐	Identified communit(ies) where the school intends to focus recruitment efforts and/or the neighborhoods from which the applicant anticipates most students will enroll	
☐	☐	An accurate description of the demographics of the proposed school's community and targeted student population	
☐	☐	A comprehensive but concise demographic and historical overview of the targeted communit(ies), which includes key events from at least the last few decades and the major political, economic, educational, demographic, and/or community-specific trends that are important to understand when seeking to serve the community	

1.2   Facilities

The proposed facility option(s) reflect identified space requirements and are viable and available in the proposed opening timeline.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Identified space requirements that adequately address the programmatic and operational needs of the school, including any proposed growth	
☐	☐	An explanation of how the proposed facilities reflect the identified space requirements (as evidenced by an adequate number of classrooms, specialized spaces, and administrative spaces) and are viable and available in the proposed opening timeline	
☐	☐	A facilities plan that includes a cost estimate for each location, evidence of interest from each facility's owner(s), and clearly articulates a plan for completing necessary renovations, including: • Construction estimates and timelines, • potential funding sources, and • plans to achieve ADA compliance	
☐	☐	A plan to appropriately address any risks associated with the proposed sites	
☐	☐	A clear timeline for securing one of two viable and available independent facilities, or one fully secured facility, that will feasibly permit school use in time for the school's opening	
☐	☐	*If the proposed site(s) will not accommodate the projected space needs throughout the entire five-year period of the contract*: A reasonable facility plan to meet space needs thereafter, including a discussion of risks and contingency plans	

1.3   Community Outreach

The proposal presents a compelling rationale for community need for the proposed school, and how the school will effectively serve the target population.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Members of the design team/board members with strong existing ties to the community	
☐	☐	Applicant conducted a needs assessment and has demonstrated need with data (community data, Annual Regional Analysis, etc.)	
☐	☐	A salient explanation of the top three challenges to the success of the specific students in the community that the proposed school intends to serve, and a plan to address those challenges aligned to the mission and vision of the school.	
☐	☐	Evidence that the design team participated in various meetings, events, and/or volunteer opportunities to become more familiar with the target community.	
☐	☐	A discussion of what community members identify as the existing assets and needs of the targeted communit(ies) and how the proposed school would build on these assets and help meet identified needs	
☐	☐	Evidence that the design team involved the community in developing an educational vision for the proposed school or, alternatively, adapting the existing model to meet the unique needs of the community	
☐	☐	A strong rationale for why the proposed school is a good fit for the community	

1.4   Updated Community Outreach

The proposal presents a compelling rationale why the proposed school(s) are a good fit for the targeted communit(ies) and will effectively serve the targeted student population(s).

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Members of the design team/board members with strong existing ties to the community	
☐	☐	Evidence that the applicant conducted significant, authentic outreach in the targeted communit(ies) to inform and seek community input about the application, including:	
☐	☐	Evidence that the design team participated in various meetings, events, and/or volunteer opportunities to become more familiar with the targeted community and develop an outreach plan	
☐	☐	Documentation of meetings that the design team held with key community organizations, businesses, and leaders	
☐	☐	Documentation that community residents attended at least one community meeting hosted by the applicant, with a discussion of the feedback received for the proposed school	
☐	☐	An evolved and updated discussion of what community members identify as the existing assets and needs of the targeted communit(ies) and how the proposed school would build on these assets and help meet identified needs.	
☐	☐	Evidence that the design team involved the community in developing an educational vision for the proposed school or, alternatively, adapting the existing model to meet the unique needs of the community	
☐	☐	An outline or table describing key pieces of feedback received from community members with an explanation of which were incorporated into plans for the proposed school or not, and why	
☐	☐	A convincing rationale for why the proposed school is a good fit for the communit(ies)	

1.5   Community and Family Support

The applicant has demonstrated that there is sufficient student demand to meet enrollment targets and community support for the proposed school.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Evidence that collectively presents a compelling case that students will choose to attend the school and the school will meet enrollment targets, including:	
☐	☐	• A sufficient number of letters of intent to enroll for age-eligible children to comprise at least half of the first-year enrollment capacity	
☐	☐	• Personalized letters outlining why parents/guardians believe the school would be a good fit for their child	
☐	☐	Evidence that the community understands and supports the school opening in its community, which may include:	
☐	☐	• A description of some of the key supporters and champions of the proposed school in the neighborhood	
☐	☐	• Letters of support from community-based organizations, businesses, leaders, elected officials, and community members	
☐	☐	• (*If any partnerships are integral to implementing the school model*) A draft contract with a specific scope of services	
☐	☐	An open acknowledgement of opposition to the proposed school	
☐	☐	Evidence of having conducted all three methods of outreach to all of the aldermen, state representatives, and state senators in the intended recruitment boundary, including:	
☐	☐	• Sending formal notification of the proposed new school	
☐	☐	• Requesting a meeting (or listing meetings already held)	
☐	☐	• Attending the aldermen's ward nights	
☐	☐	A clear vision for how the proposed school will positively contribute to the community, outlining any services, resources, programs, or volunteers that the school will offer to families and/or community members	

1.6 Continued Community Outreach & Support Materials

The proposal has improved its compelling rationale for why the proposed school is a good fit for the targeted communit(ies) and will effectively serve the targeted student population(s).

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Evidence demonstrating that the applicant has continued to engage the community	
☐	☐	Evidence that the applicant conducted significant, authentic outreach in the targeted communit(ies) to inform and seek community input about the application, including: Evidence that the design team participated in various meetings, events, and/or volunteer opportunities to become more familiar with the targeted community and develop an outreach plan	
☐	☐	An open acknowledgement of opposition to the proposed school	
☐	☐	An updated vision for how the proposed school will positively contribute to the community, outlining any services, resources, programs, or volunteers that the school will offer to families and/or community members	
☐	☐	Applicant has provided additional letters of support.	

Domain 2: Academic Plan

Key Question: Does the applicant have the capacity, leadership skills, and experience to open and operate a high-quality school that achieves the school's mission and prepares students for long-term success?

2.1 The School Model

The proposal explains who the school will serve; what it will accomplish in measurable terms; and describes the methods it will use to help students achieve defined student outcomes.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A succinct, clear, and compelling mission statement that:	
☐	☐	• Is focused on high educational outcomes for students	
☐	☐	• Reflects priorities that are meaningful, manageable, and measurable	
☐	☐	• Reflects the targeted student population	
☐	☐	• Is consistent with the purposes outlined in the Illinois Charter Schools Law (105 ILCS 5/27A-2(a))	
☐	☐	• Indicates what the school intends to do, for whom, and to what degree	
☐	☐	A vision that articulates what the school will accomplish in the near term and future, with concrete examples of anticipated student outcomes	
☐	☐	An educational philosophy that reflects the design team's core beliefs and priorities for educating the proposed student population	
☐	☐	An overview of the key design elements that explains how it is appropriate for and likely to result in improved educational performance for the targeted student population, including at-risk students	
☐	☐	*(If proposing a Next Generation blended learning model):* A compelling rationale for the scope and design of blended learning strategies, which is rooted in the needs of the student population and aligns with the educational philosophy	

2.2   Program of Instruction

The curricula will help students become critical thinkers, effective communicators, and responsible global citizens.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A convincing rationale for the chosen learning standards (attached to the proposal)	
☐	☐	A clear description of and rationale for the selection of curricula in each grade level and major subject area to be served • *For curricula already developed:* Persuasive research-based evidence and/or rationale for success of curriculum with target student population • *For curricula yet to be developed:* A thorough, detailed plan for curriculum development, citing who will be responsible for key tasks, their relevant qualifications/experience, and a realistic schedule with clear tasks and deadlines	
☐	☐	A sound explanation of how teachers will know what to teach and when to teach it, including a description of the resources that will help support teachers' instructional planning and implementation	
☐	☐	All sample curricular materials requested for the appropriate grade levels and subjects	
☐	☐	Clearly explains policies for promoting students from one grade level to the next, citing criteria for promotion and retention	
☐	☐	Specific graduation requirements with clear rationale for their selection	

2.3   Instructional Methods

Instructional strategies are intentional and engaging and will ensure that all students are challenged to use and develop higher-order thinking skills.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A clear, coherent instructional approach that aligns with and will support implementation of the school's curriculum	
☐	☐	Instructional strategies that are built on a foundation of proven educational practices and teaching approaches	
☐	☐	Clear alignment of the instructional strategies with the mission and educational philosophy of the school	
☐	☐	An explanation for and research-based evidence of how the instructional strategies will address the needs of the targeted student population	
☐	☐	*(If proposing a Next Generation blended learning model):* The response clearly explains how the teacher-student relationship will be translated into a virtual or technologically-driven classroom.	

2.4   Educational Goals and Assessments

The proposal sets ambitious but achievable goals for student achievement and outlines a clear plan to ensure that students stay on track to achieve the stated outcomes.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Specific, measurable, ambitious, realistic, and time-bound (SMART) academic goals that align with the School Quality Rating Policy (SQRP)	
☐	☐	Academic goals that reflect the mission, vision, and educational philosophy and assessment plan *(if proposing a Next Generation blended learning model, metrics for the blended learning components of the educational model)*	
☐	☐	An assessment plan and table that aligns with SQRP with descriptions of the purpose, design, and format of each assessment	
☐	☐	Demonstrated readiness to implement Partnership for Assessment of Readiness for College and Careers (PARCC), once finalized	
☐	☐	Diagnostic, benchmark/interim, and summative assessments that are valid, reliable, and appropriately aligned with curricula and Common Core State Standards (CCSS)	
☐	☐	A data collection and analysis process that school leaders and teachers use to monitor student progress toward identified goals, make curricular adjustments, improve instruction, and identify areas for professional development	
☐	☐	A clear plan for consistently communicating with parents/guardians about their child's academic progress	
☐	☐	*If proposing a Next Generation blended learning model with non-automated online courses and built-in course assessments, course materials offer students' access to answers, explanations, and/or rubrics.*	

2.5 Special Student Populations

The school has strategies in place to advance the learning of all students.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Presents a continuum of special education services, including related services, that is supported by research and best practice and likely to lead to success for the school's students with special needs	
☐	☐	Proposal and accompanying ISBE Special Education Certification form that reflect a sound understanding of the legal requirements of IDEA and Section 504, including, but not limited to:	
☐	☐	• The charter's obligation to serve students with special needs	
☐	☐	• Providing a Free and Appropriate Education (FAPE) to all students	
☐	☐	• Providing a continuum of special education services in the Least Restrictive Environment (LRE), including providing access to the general education curriculum, standardized testing, extracurricular and culture-building activities	
☐	☐	• Methods for identifying and supporting students with disabilities	
☐	☐	• Procedures for evaluating identified students, developing Individualized Education Plans (IEPs), and monitoring and assessing progress, including the roles of personnel and parents	
☐	☐	• The rights of students with disabilities in disciplinary proceedings	
☐	☐	Well-defined processes for identifying English Learners, including administration of placement assessments and communications to parents and teachers	
☐	☐	Proposal and accompanying ISBE English Learners Certification form that reflect a sound understanding of the legal requirements related to English Learners	
☐	☐	A clear description of an academic multi-tiered system of support to identify and meet the needs of students requiring support beyond general education, including levers, methods, and protocols to be used to assess and	

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
		differentiate instruction to meet students where they are.	
☐	☐	A clear understanding of expected remediation needs of incoming students	
☐	☐	Programs and services to ensure that all students are challenged with the appropriate level of rigor, including students with accelerated learning needs	

2.6   School Calendar and Schedules

The school calendar and schedule provide a clear picture of how students and teachers will spend a typical day at school, incorporating all of the unique aspects of the proposed school model.

> **Rating:**
>
> ☐ Meets the Standard
>
> ☐ Partially Meets the Standard
>
> ☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Annual calendar that:	
☐	☐	• Is compliant with the Illinois School Code	
☐	☐	• Reflects all of the instructors' professional development days and student assessment days	
☐	☐	• Is supported by the school's proposed budget	
☐	☐	Teacher and Student Weekly Schedules that:	
☐	☐	• Provide a clear picture of how a teacher or student would respectively spend a day at the school	
☐	☐	• Reflect all of the instructors' described professional development requirements, collaboration time, and roles and responsibilities	
☐	☐	• Reflect all described student activities	
☐	☐	*(If proposing a Next Generation blended learning model):* The proposal specifies the percentage of time students will engage in learning through digital mediums and provides a clear rationale for designating that percentage of time.	

2.7.1 School Culture and Social Emotional Learning

The proposal reflects a realistic understanding of the anticipated social, emotional, mental, and physical health needs of the student population with an intentional strategy to promote positive student behavior and foster a positive academic and social environment with high expectations.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	The application cites clear evidence-based practices, policies, systems, and traditions that promote positive student behavior and foster a positive academic and social environment with high expectations.	
☐	☐	Well-defined goals for school culture and plans to monitor progress.	
☐	☐	A plan to communicate and norm a culture of high expectations with students, teachers, administrators, and families and promote positive behavior	
☐	☐	Description of the referrals, levers, methods, protocols, management and monitoring systems for the full scope of a MTSS, including a sound description of Tier 1 instruction (supportive and restorative learning climate with appropriate SEL skills development); Tier 2 instruction (targeted supports ad interventions); and Tier 3 instruction (listing highly structured, individualized interventions).	
☐	☐	Clearly identified staff members to perform all roles and responsibilities described in this subsection, with alignment to their job descriptions, annual and weekly schedules, and the staffing and organizational charts	

2.7.2 Discipline, Behavioral Intervention, and Classroom Management

The proposal cites the systems, programs, and policies that will support the behavioral needs of all students and help remove barriers to learning.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A system of discipline and classroom management that is fully tethered to the MTSS identified in the previous section.	
☐	☐	Clear identification of specific staff members who are responsible for overseeing the implementation of student discipline and behavioral interventions, including maintenance of student records and data	
☐	☐	Plans to consistently communicate behavior expectations, consequences, and rewards to students and families	
☐	☐	A comprehensive list of offenses that may result in student suspension or expulsion	
☐	☐	An explanation of the corrective, instructive, and/or restorative responses to misbehavior that will be used prior to the use of exclusionary discipline, including a clear description of how the school intends to comply with SB 100 (PA 99-456)	
☐	☐	An explanation for how the school will protect the rights of students with disabilities/ impairments in disciplinary actions and proceedings, afford due process for all students, and provide a fair process for students facing expulsion	

2.8.1 Graduation and College Readiness Support

The proposal presents robust plans to ensure that students will graduate prepared for success in high school (for elementary schools) and college.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A clear post-secondary vision reflecting high expectations for students.	
☐	☐	Clearly identified staff members to perform all roles and responsibilities described in this subsection, with alignment to their job descriptions, annual and weekly schedules, and the staffing and organizational charts	
☐	☐	Age-appropriate college readiness supports that will build college awareness and readiness among students	
☐	☐	*(If proposing a high school):* Robust supports to help students apply, enroll, and persist in college	
☐	☐	*(If proposing a high school):* Methods for tracking student/alumni college acceptance and persistence rates	
☐	☐	*(If proposing an elementary school):* Robust supports to ensure that students are prepared to attend and succeed in a rigorous high school	

2.8.2 Parent and Community Engagement

The proposal demonstrates the capacity and intent to build continued authentic engagement with the parents and greater community.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Applicant has explained thoughtful methods to build family-school partnerships to encourage the involvement of parents/ guardians in the school and their student's education	
☐	☐	A description of the nature and extent of parent and community involvement in the governance and operation of the charter school	
☐	☐	Clear mechanisms for parents and community members to provide feedback and/or express an objection or concern to the school and Board on an ongoing basis	
☐	☐	Clearly identified staff members to perform all roles and responsibilities described in this subsection, with alignment to their job descriptions, annual and weekly schedules, and the staffing and organizational charts	

2.9.1 Recruitment and Selection

The human resources strategy will realistically help the school identify and attract highly effective teachers, leaders, and staff who are committed to fulfilling the school's mission.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A staffing plan that includes all instructional and non-instructional positions in the school over the five years of the charter contract and aligns with descriptions of positions and the school model in other parts of the proposal,	
☐	☐	A clear description of how the staffing plan will support student achievement	
☐	☐	Sensible and clear organization-level decision-making authority that delineates the respective roles and responsibilities of the Board, management organization, school administration, and any school advisory bodies or parent/teacher councils	
☐	☐	Alignment between the positions cited in the organizational chart, staffing model, and budget	
☐	☐	Attached job descriptions that clearly delineate the roles and responsibilities for each position	
☐	☐	Strategies for recruiting and hiring staff members who can drive student achievement, including bilingual-certified, special education, and other high-need teachers	
☐	☐	Hiring criteria, selection process, and job descriptions that are clearly aligned to the school's mission, educational philosophy, and professional culture *(Next Generation applicants specify whether faculty and administrators will be required to have experience teaching in blended learning environments)*	
☐	☐	Proposed compensation and benefits packages that are competitive and will allow the school to attract and retain highly qualified staff	

2.9.2 Professional Development

The human resources strategy will realistically help the school develop and retain highly effective teachers, leaders, and staff who are committed to fulfilling the school's mission.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	An approach to PD that is constructive, reflective, growth-oriented, and based on the provision of meaningful and timely feedback	
☐	☐	Clearly delineated roles and responsibilities for facilitating PD opportunities	
☐	☐	A plan for identifying PD topics and determining whether PD will be provided internally or externally	
☐	☐	Adequate protected time in the school's schedule and calendar to implement the described PD supports and collaboration time	
☐	☐	PD costs accounted for in the budget	
☐	☐	PD adequately addresses the unique needs of new staff	
☐	☐	An induction plan for all teachers that orients staff to the educational program and cultural expectations	
☐	☐	A plan for using data on student performance and from teacher evaluations/coaching cycles to evaluate the effectiveness of PD and inform future PD content	
☐	☐	Clearly articulated characteristics of a professional culture that will promote high staff performance and retention	

2.9.3 Staff Evaluation

The human resources strategy will realistically help retain highly effective leaders, teachers, and staff.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Schedules and processes for teacher observation and evaluation	
☐	☐	Explanation for how teacher evaluations are tied to PD, compensation strategies, staffing decisions, etc. *(Next Generation applicants specify how evaluation procedures will be adapted for blended learning and online teachers)*	
☐	☐	The proposal provides clear criteria for evaluating school leaders(s), specifies a process for providing an annual performance review, and describes mechanisms for offering school leader(s) consistent feedback	

2.10 Design Team Experience and Capacity

The design team's (or existing school network's) experience and track record demonstrate the capacity to open and operate a high-quality charter school.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A summary for each design team member with details on each person's experience and credentials, role during the design phase, and intended role in the proposed school	
☐	☐	Design team members and founding board members that possess the wide-ranging skills and experience needed to open, operate, and sustain a high-quality charter school, including previous experience serving the school's targeted population	
☐	☐	Clear explanations of the role(s) of consultant(s) in developing the proposal or implementing the proposed model (if approved to open)	
☐	☐	Clearly delineated roles and responsibilities for each member of the instructional leadership team that are reflected in the attached job descriptions	
☐	☐	Quantitative evidence of instructional leaders' individual track records of driving significant academic gains with similar student populations in a school setting	
☐	☐	A well-rounded leadership team that collectively has the qualifications and track record necessary to ensure the successful implementation of the academic, operational, and financial operations of the school	
☐	☐	Clear plans to provide sufficient leadership development and support to address any gaps in skill or experience to ensure success in a given role	
☐	☐	(Existing National Operator only): Student demographic information and quantitative academic growth, attainment, and behavioral performance data for every existing school in the network	
☐	☐	(Existing National Operator only): Half of the schools in an existing operator's national network meet the criteria for	

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
		demonstrating a proven track record for academic growth, attainment, and behavioral metrics, as outlined in Appendix 1 of the Resource Guide	
☐	☐	(If an existing operator does not currently have any schools in its network that serve a similar student population to the anticipated student body in Chicago) A clear rationale as to why the design team believes the model will translate to the targeted student population with a description of the additional supports to meet the needs of the targeted student population	

Domain 3: Financial Plan

Key Question: Does the proposal present a sound fiscal plan and policies to ensure responsible management of public funds?

3.1 School Budget

The financial forms are complete, include clear and reasonable assumptions, reflect sustainability and financial health, and are aligned with the school's mission and priorities.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A reasonable multi-year budget that reflects financial health, includes all schools and the central organization structure (if applicable), and maintains (at a minimum) a positive cumulative cash position	
☐	☐	A contingency budget that meets all criteria below, remains solvent, provides essential services, and aligns with the mission and goals of the school.	
☐	☐	Reasonable assumptions with sufficient detail and specificity to allow for an assessment of fiscal viability	
☐	☐	An explanation for how all spending aligns with the school's mission, vision, and philosophy	
☐	☐	Sound revenue projections and planned expenditures that reflect all aspects of the school model (including blended learning costs, if applicable)	
☐	☐	Capital funding for school facilities with clearly identified sources of funding	
☐	☐	Adequate reserves and contingency plans based on the minimum enrollment needed for solvency, especially during the start-up years of the new school(s)	
☐	☐	Reasonable fundraising plans that clearly identify the amount of additional revenue needed to maintain financial viability over the five-year contract	
☐	☐	Evidence of existing relationships with potential funders and current levels of interest that suggest the fundraising plan is viable	

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Contingency plans in the event that development goals are not realized	
☐	☐	The most recent audited financial statements and federal tax returns from the national operator or MO indicate strong liquidity and a healthy capital structure to support the future growth projections	

3.2   Financial Controls and Monitoring

The proposed financial controls are sufficient to ensure proper use of public funds.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Comprehensive fiscal management, monitoring, and oversight policies and controls that clarify who has authority of the school's fiscal affairs, internal controls, accounting practices, purchasing, and payroll policies	
☐	☐	A function for receiving revenue, paying expenses, disbursing payroll, maintaining financial records, and generating reports	
☐	☐	Financial reporting structures that make cash flow clear, provide budget-versus-actual numbers, and plan for annual external audits	
☐	☐	A description of how the Board will receive updates and monitor the school's financial position, including a list of all financial reports generated, the frequency of generation, and responsible party	
☐	☐	A clearly identified staff member responsible for directly managing and overseeing the school's budget	
☐	☐	A clear and adequate catalog of financial reports generated and to be generated, indicating frequency and responsible party	

Domain 4: Operational Plan

Key Question: Will the proposed operational and governance systems ensure that planning, spending, and oversight decisions are fiscally responsible and prioritize student success?

4.1 Operations

The school start up and operations plans will ensure that the school provides a safe and secure environment for students starting on day one.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A plan and dedicated staff who will be able to effectively perform the wide range of operational duties required to run a school, including but not limited to transportation, food service, building operation, purchasing processes, student records, school safety	
☐	☐	Clear roles for leadership, faculty, and staff to participate in operational decision-making processes, including the development of personnel policy	
☐	☐	A feasible, detailed start-up plan with key milestones, tasks, owners, and completion dates covering the array of activities required to successfully open a new school on time and ready to serve students on day one	
☐	☐	A clear explanation of the roles and responsibilities of any staff in the incubation year and a plan to compensate them during this time	

4.2   Student Recruitment and Enrollment

Plans for student recruitment and enrollment will provide all students an equal chance at admission and ensure that the school serves a diverse student population.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Realistic student enrollment targets that align with other relevant parts of the proposal, including the five-year budget, staffing plans, facility plans, etc.	
☐	☐	A detailed student recruitment plan that is realistic, aligned with the school mission, and likely to position the school to meet its enrollment targets in each year of five-year contract	
☐	☐	Strategies to recruit and retain the targeted student population, as well as students with disabilities, students with Individualized Education Plans, students who are English Learners, and students in at-risk situations, including, but not limited to, students who are homeless	
☐	☐	Clear application, enrollment, and registration policies and forms that ensure the school is accessible to all students and families and is in compliance with the Illinois Charter Schools Law	
☐	☐	A plan to administer the lottery in a way that provides each student an equal chance at admission and does not create a barrier to application, enrollment, or registration	
☐	☐	Clear policies to maintain a waitlist and overseeing student withdrawal, re-enrollment, and transfers	

4.3 Operational Compliance

The proposal presents realistic plans to comply with legal requirements.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	The transportation plan specifies how the school will identify the transportation needs of its student body, what supports and services the school will dedicate to meet student transportation needs, and which staff member(s) will be responsible for overseeing transportation services and supports. If transportation services and supports require funding, costs are included in the five-year budget.	
☐	☐	The Americans with Disabilities Act (ADA) compliance plan clearly articulates how the proposed school will ensure compliance with requirements under the ADA.	
☐	☐	The proposal outlines the technology, equipment, processes, and/or personnel it will use to ensure the ongoing safety and security of students and staff.	
☐	☐	The application specifies the types of insurance the school will secure and at what levels of coverage.	

4.4.1 Governance Start-Up

The board will have the capacity and supports to provide strong academic, financial, and operational oversight of the school.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Qualified board members (with at least the Board Chair and most officer positions identified) who have the wide range of relevant knowledge, skills, and commitment needed to oversee a successful charter school, including but not limited to: Educational, financial, legal, fundraising, prior governance experience, community experience (at least one board member has strong ties to the community), and special skill sets for unique school models (e.g. blended learning models)	
☐	☐	Complete Board Member Forms and Economic Interest Forms from all proposed board members	
☐	☐	Proposed board members who display a robust understanding of their roles and responsibilities in providing academic, financial, operational, and legal oversight of the proposed charter school	
☐	☐	Viable plans and clear procedures to recruit and select diverse Board members, both to fill any remaining gaps in skills prior to school opening and continually once in operation	
☐	☐	A thorough plan to build the capacity of the board by providing orientations and trainings for the inaugural board leading up to school opening, all new members, and continually for the established board once in operation	
☐	☐	A clear action plan for establishing the "working" Board in the incubation year	

4.4.2 Governance Structure and Ongoing Oversight

A clearly explained governance structure and clear plans and policies are likely to ensure meaningful and effective oversight of the school.

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☐ Partially Meets the Standard

☐ Does Not Meet the Standard

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	An explanation for how the governing body's size, regular meeting schedule, explicit powers and duties, committee structure, process for expansion, terms, and succession plans (as outlined in the bylaws) will ensure that the school is equipped to meet its mission and goals	
☐	☐	Defined roles, responsibilities, and lines of authority for each Governing Board officer position and committee, as well as differentiation of roles and responsibilities between the board, school administration, and MO (if applicable)	
☐	☐	A clear mechanism to ensure that parents, community members, and key stakeholders will be active in the governance of the school; a forum for parent, teacher, and community input; and strategies for communicating board priorities and decisions to all stakeholders	
☐	☐	(If applying as an existing non-profit organization) A plan to establish a new separate and distinct non-profit corporation to oversee the school. If the non-profit's existing board plans to govern the school, robust plans to ensure that the board will be transformed to provide proper oversight of a public charter school with clear guidelines to avoid co-mingling of funds between the school and the partner organization	
☐	☐	Formalized procedures for the Board to run effective, outcomes-focused meetings to monitor the school's academic, financial, operational, and organizational progress on a consistent basis, including by setting clear goals, metrics, and rubrics for evaluation prior to the school year	
☐	☐	Clearly defined systems and protocols for the board to consistently monitor academic, operational, and financial performance metrics, including a	

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
		description of how the board will receive this information and from whom	
☐	☐	Policies, metrics, and goals that the Board will use to evaluate its own effectiveness on at least an annual basis	
☐	☐	Well-defined accountability policies for the board, including attendance and committee service requirements	
☐	☐	Clearly articulated triggers and a defined process to remove Board members if they are not meeting expectations.	

4.4.3 Board Legal, Compliance, and Ethics Policies

The proposal describes clear policies and procedures for the board to govern the school in a lawful and ethical manner.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Plans for the board to operate in compliance with the Illinois Charter School Law, Open Meetings Act, and the Freedom of Information Act	
☐	☐	An Ethics Policy that holds the proposed school's Board members, directors, officers, and employees to high standards of ethical conduct. At a minimum, the Ethics Policy provides guidance on the following topics:	
☐	☐	• Nepotism	
☐	☐	• Financial interests in contracts	
☐	☐	• Gifts, loans, and favors	
☐	☐	• Secondary employment	
☐	☐	• Postemployment and post-membership restrictions	
☐	☐	• Political activities	
☐	☐	A Conflict of Interest policy that describes clear procedures to identify and address or mitigate any perceived or actual conflicts of interest among Board members, directors, officers, employees, agents, or family members. The formal Conflict of Interest Policy at a minimum:	
☐	☐	• Provides a clear definition of a private interest, direct or indirect, in quantifiable terms (if financial in nature) for Board members, directors, officers, employees, agents, or family members;	
☐	☐	• Establishes a clear policy and procedure to disclose conflicts of interest;	
☐	☐	• Specifies procedures to address or mitigate a conflict of interest; and	
☐	☐	• Provides a method to determine disciplinary or corrective actions if a conflict of interest fails to be disclosed for Board members, directors, officers, employees, agents, and others.	

Domain 5: Business Plan

Key Question: Does the existing organization have a strategic growth plan and the academic, financial, and operational capacity to successfully open, operate, and oversee the proposed new school(s)?

5.1 Growth Plan

The organization has conducted a strategic planning process and analyzed its own capacity to support the proposed pace and scope of growth.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Clear identification of any areas in which the new school(s) will depart from the existing policies and practices of the proven school model	
☐	☐	Plans and timelines for the development of any aspects of the school that will differ from the existing model	
☐	☐	A list of all proposals for schools that are pending or recently approved by other authorizers	
☐	☐	A sound and convincing rationale for the number of schools, location, and pace of growth, including expansion into Chicago specifically (if not already operating schools in the city)	
☐	☐	An explanation for how growth helps advance the organization's mission and vision	
☐	☐	A description of a thoughtful and performance-based approach to replication decisions, guided by clearly-defined academic, operational, and financial benchmarks	
☐	☐	An honest and realistic assessment of the risks associated with growth	
☐	☐	A discussion of how the organization plans to continue to provide high-quality services despite the risks posed by growth	

5.2   Academic Capacity

The organization has clear plans and systems in place to implement a high-quality educational model with fidelity.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A clearly identified list and description of non-negotiable features of the model that align with the school's mission and a description of the process through which schools are afforded autonomy.	
☐	☐	(*If the academic model will differ from the one employed at existing schools*): A description of how the modified model will effectively serve the targeted student population, utilize rigorous curricula, and ensure that teachers deliver powerful instruction	
☐	☐	A clear timeline and plan for the new school to finalize any autonomous processes	
☐	☐	A comprehensive strategy for timely and regular assessments of performance and a sound process for evaluating performance against clearly identified benchmarks	
☐	☐	Clearly identified roles and responsibilities for monitoring academic outcomes at the board, network, and school level	
☐	☐	An established process for implementing strategies to improve performance when benchmarks are not met	
☐	☐	Interventions that use actionable improvement plans with follow-ups at both the school and organizational levels to address identified issues	
☐	☐	(*If applying to open new school(s) while existing school(s) are on academic probation or the Warning List*): A convincing and robust plan to significantly improve performance at failing school(s) while simultaneously opening new schools	

5.3 Operational Capacity

The operator has demonstrated the organizational capacity to support the opening, operation, and oversight of additional school(s).

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	Sensible and clear decision-making authority assigned to the board, network leadership, management organization (if applicable), school administration, and any school advisory bodies or parent/teacher councils	
☐	☐	Clearly identified services and resources provided by the network and any national, state-wide, or regional offices to support the growth strategy	
☐	☐	A human resources strategy that will realistically identify and attract highly effective teachers, leaders, and staff who are committed to fulfilling the school's mission	
☐	☐	Established "sources" or pipelines of talent to help fill all positions with quality hires	
☐	☐	Sufficient resources dedicated to recruiting and hiring efforts	

5.4 Past Organizational and Financial Performance

The applicant demonstrates a track record opening and operating fiscally sound and legally compliant schools. The operator has acted as a good faith partner with other schools and districts with whom it has contracted.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	If any schools have been placed on fiscal probation, had their contract terminated, voluntarily closed, have not been renewed by their authorizer, voluntarily exited a partnership, or failed to open, an explanation of the circumstances surrounding these incidents and how the MO responded to each situation	
☐	☐	In compliance with Illinois law, proper disclosure of any known active civil or criminal investigations into any member of the operator's governing body, including any investigation by a local, state, or federal law enforcement agency	
☐	☐	An explanation of the details of any litigation or arbitration that has involved the MO	
☐	☐	Transparent accounts of all schools' past organizational and operational performance (additional due diligence conducted by CPS did not surface any additional information)	

Domain 6: Management Organizations (MOs)

Key Question: Does the proposal provide a plan and evidence for how the proposed MO will contribute to the overall success of the school? Does the proposal provide appropriate oversight structures?

6.1 MO Contract

The draft MO agreement clearly articulates the terms and scope of services provided by the MO.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A description of the MO selection process and criteria that the founding or existing board used to assess the MO's academic, financial, and organizational track record	
☐	☐	Evidence that the founding or existing board conducted appropriate additional due diligence on the MO prior to Application submission	
☐	☐	Clearly articulated contract terms clarifying the relationship, roles, and responsibilities of the proposed school's Board, the MO, and school administration and staff	
		A draft MO contract that does the following:	
☐	☐	• Clearly describes the services to be provided by the MO	
☐	☐	• Identifies the compensation to be paid for MO services	
☐	☐	• Clearly articulates financial controls and oversight	
☐	☐	• Provides methods of contract oversight and enforcement	
☐	☐	• Provides conditions for contract renewal or termination	
☐	☐	• Establishes the primacy of the charter contract over the MO contract	
☐	☐	• Identifies the proposed school's Board as the party ultimately responsible for the school	
☐	☐	• Defines the MO as a service provider	
☐	☐	• Prohibits a third party from selecting, approving, employing, compensating, or serving as school governing board members	
☐	☐	• Requires the school governing board to select, retain, and compensate the	

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
		school attorney, accountant, and audit firm	
☐	☐	• States that no MO staff can be simultaneously employed by the charter school	
☐	☐	• Provides terms to avoid conflicts of interest between the board and MO	
☐	☐	• Requires that all materials purchased with public funds are property of the school, not the MO	
☐	☐	A clearly articulated compensation and/or fee structure for MO services	
☐	☐	An explanation of the MO's role in selecting the school leader, who employs the school leader, and whether the school leader reports to the MO	

6.2   MO Oversight

The proposal provides reasonable and enforceable plans for the board to monitor the MO's performance and hold it accountable for meeting defined performance benchmarks.

Rating:
☐ Meets the Standard
☐ Partially Meets the Standard
☐ Does Not Meet the Standard

Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	A description of the process that the board will use to monitor MO performance, which should discuss:	
☐	☐	• Quantitative performance indicators	
☐	☐	• Consequences if performance benchmarks are not met	
☐	☐	• Regular evaluation procedures	
☐	☐	• Scheduled renewal decision making by the school's Board	
☐	☐	Clear acknowledgment of the board's capacity to terminate the relationship with the MO if necessary	

6.3 MO Past Organizational and Financial Performance

The applicant demonstrates a track record opening and operating fiscally sound and legally compliant schools. The operator has acted as a good faith partner with other schools and districts with whom it has contracted.

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Criteria & Findings

Met	Not Met	Criteria	Findings, Notes, Questions (please provide page numbers for reference)
☐	☐	In the case that any schools have been placed on fiscal probation, had their contract terminated, voluntarily closed, have not been renewed by their authorizer, voluntarily exited a partnership, or failed to open, an explanation of the circumstances surrounding these incidents and how the MO responded to each situation	
☐	☐	In compliance with Illinois law, proper disclosure of any known active civil or criminal investigations into any member of the operator's governing body, including any investigation by a local, state, or federal law enforcement agency	
☐	☐	An explanation of the details of any litigation or arbitration that has involved the MO	
☐	☐	Transparent accounts of all schools' past organizational and operational performance (additional due diligence conducted by CPS did not surface any additional information)	