

2018-19

# Application Kit for Community Schools

Cleveland Metropolitan School District

1111 Superior Avenue Cleveland, Ohio 44114

**Application Issued: May 31, 2018**

**Intent to Apply Due: August 1, 2018\***

**Application Due: August 31, 2018\***

**Interviews: October 2 – 31, 2018\***

**Decisions Made,  
Applicants Notified: November 2018\***

*\*Please note that these deadlines do not apply to schools applying to switch sponsors to CMSD. CMSD accepts those applications on a rolling basis.*

Office of Portfolio Planning, Growth and Management  
Cleveland Metropolitan School District  
2018-19



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## Request for Proposals (RFP) for 2018-19

For the 2018-19 application cycle, the Cleveland Metropolitan School District (CMSD) is accepting applications for new community school models, replication of existing models, and requests to change sponsors. This single Application Kit for any of these types of applications is meant to simplify the application process and minimize confusion. Please refer to page nine for a table that indicates which sections of the Application Kit are applicable to your type of application. CMSD also suggests reading each section carefully to determine whether the question is relevant to your application intent.

### Intent to Apply (Due August 1, 2018)

To help CMSD prepare for the application cycle, and to ensure your applicant group receives all appropriate communications from CMSD throughout the application process, all applications ***except those from existing schools seeking to switch sponsors to CMSD*** must submit an Intent to Apply. Please email the following information to [Shemekia.Love@clevelandmetroschools.org](mailto:Shemekia.Love@clevelandmetroschools.org) by 5:00 p.m. EDT on August 1, 2018. You may print out this form and attach it to the email or copy the information requested, along with your responses, directly into the email. The subject of the email should be "Intent to Apply."

Type of Application: (Please indicate "New School" or "Replication School")

Lead Applicant Name:

Lead Applicant Contact Number:

Lead Applicant Email:

Names of Existing Schools Under School Model Proposing to Replicate (if applicable):

Name of Proposed School:

Proposed Geographic Location of School:

Month/Year Proposed School Plans to Open:

## Introduction

Thank you for your interest in community school sponsorship with the Cleveland Metropolitan School District (“CMSD”). Since Ohio’s community school law passed in 1997, over 400 community schools (also referred to as charter schools) have opened across Ohio. CMSD is committed to sponsoring high-quality community schools that meet the needs of Cleveland’s children.

Community schools are secular, tuition-free public schools governed by not-for-profit organizations. Ohio’s community school legislation offers students, families, and educators more choices in public education. Community schools receive more autonomy and flexibility in how they operate compared to traditional school district-managed schools, in exchange for stricter accountability and higher educational standards.

CMSD’s sponsorship of community schools is in furtherance of *Cleveland’s Plan for Transforming Schools* (the “Cleveland Plan”), which was developed by a broad range of community stakeholders and approved in 2012 by the Ohio State Legislature in the form of enabling legislation, House Bill 525. The goals of the Cleveland Plan are to ensure that every child in Cleveland attends a high-quality school and that families in every Cleveland neighborhood have choices among high-performing public schools, whether CMSD or community schools.

This Community School Application Kit defines the information CMSD requires from community school applicants seeking to open a new school, replicate an existing school model, or transfer sponsorship to CMSD. Rigorous in its demand for excellent school planning, design, and governance, the application communicates the high expectations CMSD sets for community schools.

CMSD sets the following goals and priorities for its community schools:

- Create and/or replicate high-quality options throughout Cleveland, especially in neighborhoods where there is a shortage of such options;
- Maintain high standards of teaching and learning, in alignment with city, state, and federal expectations, and as demonstrated on the state’s local report cards;
- Engage as part of a portfolio of public schools that includes both community and district schools working collaboratively to meet the goals of Cleveland Plan;
- Provide a full range of services and supports to meet the needs of all students who select the community school option;
- Be representative of the CMSD population and/or reflective of the neighborhood in which the school is located; and
- Narrow and/or eliminate the achievement gap.

CMSD expects the community schools it sponsors to be innovators while at the same time focusing on academic results. Schools sponsored by CMSD offer parents, teachers, administrators, and other members of the community the chance to design a school from the ground up. For this opportunity, CMSD expects the schools it sponsors to be leaders in improving public education for all students in the city. Schools select their own academic design, instructional delivery, and staffing structure, but they must focus on ensuring that students attain academic success. Community schools are accountable for their performance on the state assessments and are subject to state and federal requirements and consequences.

Community schools are not a part of CMSD and are not governed by the CMSD Board of Education. They operate under a contract with CMSD, which serves as their sponsor. The contract includes specific goals for the school's academic, organizational, and financial compliance and performance. A sample contract with performance expectations can be found on our website at <http://www.clevelandmetroschools.org/Page/6133>. Community schools are expected to meet the performance expectations set forth in their contracts. Those that do not meet these expectations face a variety of consequences, including potential closure.

### **Application and Review Process**

Each complete application submitted in response to this RFP will be evaluated by a review team of at least five trained evaluators, at least two of whom shall have three or more years of experience with sponsoring community schools. The review team will include CMSD personnel and may include external reviewers. Its members will have expertise with school education plans, school governance, school finance, school accountability, and, if applicable, the proposed school's area of specialization. The evaluation will include a capacity interview of the applicant team by the review team. In the case of an application either to replicate an existing school model or to transfer an existing school's sponsorship to CMSD, CMSD also will interview the applicant's current sponsor and, if applicable and at CMSD's discretion, past sponsor(s). Based on the application and interview(s), the review team will make a formal recommendation to the CMSD Board of Education for approval or denial of the application.

Each section will be scored by a reviewer, and no school will be recommended for approval unless it receives at least 66 percent of the total points possible for the type of application submitted (new school, replication school, or transfer of sponsor) on sections that are assigned numerical ratings. Please note, however, that earning 66 percent of possible points does not guarantee that a school will be recommended for approval. No application will be approved unless it earns specific minimum scores on several individual sections. On other sections, the application is simply rated as either Pass or Fail, and the application must pass all of these sections in order to be approved. For details, please see the Application Reviewer Kit available at <http://www.clevelandmetroschools.org/Page/6133>.

Please note that the application phase is the first of many steps toward earning the privilege of operating a community school. After the CMSD Board of Education approves an application, the Charter Schools Office will notify the applicant in writing. This will happen in November. After receiving the Board's approval, the parties may enter into a preliminary agreement. Once a preliminary agreement has been executed, CMSD will work with the applicants to finalize the community school contract. This timeline provides accepted applicants with nine months of planning time before the proposed school opens.

Even receiving a contract from CMSD does not ensure that a school will open. State law requires that all schools satisfy many pre-opening requirements prior to receiving the final approval to serve students. These requirements must be submitted by the sponsor to the Ohio Department of Education no later than ten days prior to the first day of school. Failure to satisfy all pre-opening requirements may delay the opening of the school.

Finally, please note also that CMSD-sponsored community schools do not receive guaranteed access to facilities. CMSD has established a separate facilities process for organizations interested in accessing space available in existing CMSD facilities. Community school applicants interested in applying for the opportunity to access space in CMSD facilities must submit a separate application to CMSD Chief Operating Officer Patrick Zohn, at [patrick.zohn@clevelandmetroschools.org](mailto:patrick.zohn@clevelandmetroschools.org). Please contact Mr. Zohn for more information on the process.

Thank you again for your interest in community school sponsorship with CMSD. CMSD is committed to ensuring that all school opportunities granted by the CMSD Board of Education are well-designed and supported by individuals and organizations with the capacity and the drive to overcome the challenges of preparing *all* students to succeed academically.

## Terminology

**Accountability.** Performance-based accountability is a central component of community school policy. Community schools must have clear, measurable academic performance standards under which they will operate and be evaluated. Also, community schools must be financially accountable, provide evidence of public satisfaction and support, and must comply with applicable laws such as health and safety, special education, and all civil rights laws. The CMSD Board of Education will only approve applications that clearly demonstrate strong capacity for establishing and operating a high-quality community school. The Board reserves the right to accept or reject any application that in its sole judgment fails to meet CMSD’s goals and objectives for sponsored schools. In addition, the Board reserves its right to select the best qualified candidates from among those submitting applications.

**Autonomy.** Community schools operate with substantial autonomy and flexibility in comparison to traditional public schools. School operators have the opportunity and responsibility to decide the best ways to allocate resources to best meet the needs of their students within the bounds of the law. For example, operators may determine the length and structure of the school day in a way that best fits the educational program; they may structure staffing in a way that best supports teachers and students; and they may structure the budget to ensure that teachers will have the instructional resources they need to be effective. The authority of operators to make these types of decisions is premised on the belief that those closest to students are best suited to make decisions about meeting their learning needs.

**Community school.** Also called charter school, a community school is a public school, independent of any school district, and part of the state’s program of education. Please see Chapter 3314 of the Ohio Revised Code (<http://codes.ohio.gov/orc/3314>) for more information.

**Governance.** A community school is governed by a not-for-profit governing authority, alternatively referred to as the governing board or the board of trustees. High-performing community schools have governing authorities that are composed of individuals with a mixture of backgrounds and expertise relevant to governing a public, not-for-profit educational organization. Such experience and expertise may include educational programs, legal compliance, real estate and facilities, financial management and accounting, fundraising and development, human resources management, community engagement, and parent involvement.

**Preliminary Agreement.** This is a written agreement that sets forth the intention of both parties to pursue, in good faith, the execution of a community school contract in accordance with Chapter 3314 of the Ohio Revised Code. The preliminary agreement must precede the contract.

**Replication.** Term used to describe when an existing charter school seeks to establish one or more additional schools using the same educational model and maintaining a close relationship between the initial school and the replication models.

**Sponsor.** Also referred to as authorizer. Community schools are created by a contract with a community school sponsor. CMSD is designated as a community school sponsor under state law.

## Request for Proposals to Establish a Community School Sponsored by CMSD

The remainder of this Application Kit is dedicated to the specific steps and requirements that a community school applicant must follow to submit an application to start a new school, replicate an existing school, or change its sponsorship to CMSD. All necessary forms, requirements, and deadlines related to the application process are included within this Application Kit.

The Application Kit is not a guide to community school law and other laws that govern the operation of public schools. It is the sole responsibility of the applicant to fully understand and address the legal requirements of all relevant laws. Applicants must present a coherent and viable school design that both complies with the law and is likely to improve student learning and achievement for the children of Cleveland.

CMSD looks forward to reviewing your proposal and partnering with you to develop a high-quality public community school in Cleveland.

As a reminder, please ensure that your group has submitted the Intent to Apply by the **August 1, 2018** deadline, unless you are an existing school seeking to switch sponsors. For more information, see page 3 of this Application Kit.

Finally, please note that recent changes in Ohio law may impact whether CMSD can sponsor new or additional schools. All sponsors in Ohio are evaluated annually by the Ohio Department of Education through a sponsor performance evaluation. The results of the review must be published between October 1 and November 15 of each year. Sponsors that are rated ineffective are prohibited from sponsoring new or additional schools during the time the sponsor is rated ineffective. CMSD's current rating is Effective based on the results published in November 2017 for the 2016-17 sponsor evaluation.



## Resources for Applicants

You can find more information about CMSD's relationships with charter schools and other helpful resources on our website at <http://www.clevelandmetroschools.org/domain/2528>.

In addition, the following websites may be helpful to applicants interested in applying to CMSD for charter school sponsorship. Please note that education policy and Ohio laws and regulations change frequently, and CMSD cannot verify the accuracy of all the information linked here. School applicants are encouraged to consult with legal counsel if legal advice is needed.

Information on the Cleveland Plan, available at <http://www.clevelandmetroschools.org/Page/532>

Ohio Department of Education (ODE) information on community schools, available at <http://education.ohio.gov/Topics/Community-Schools>

Ohio Revised Code, Section 3314 et al., available at <http://codes.ohio.gov/orc/3314>

Cleveland Transformation Alliance, available at <http://www.clevelandta.org/>

## Applicant Guidance

This single application can be used for applicants seeking to open a new school, replicate an existing school model, or transfer sponsorship from another authorizer to CMSD. Not all sections of the application apply to each type of applicant. The following table is intended to assist applicants in navigating which sections may apply to their type of applications. If you are uncertain whether a section applies to your application, please contact CMSD Executive Director of Charter Schools, Stephanie Klupinski, at [Stephanie.Klupinski@clevelandmetroschools.org](mailto:Stephanie.Klupinski@clevelandmetroschools.org).

Section	Section Type	New School	Replication School	Sponsor Transfer
	Intent to Apply	X	X	
1	Applicant Information	X	X	X
2	Executive Summary	X	X	X
3	Student Enrollment Plan	X	X	X
4	Simultaneous Submission to Another Entity	X	X	X
5	Sponsor Status of Other Schools in Model		X	X
6	Affiliated Organization Information	X	X	X
7	Capacity to Replicate		X	
8	Performance Rationale for Replication		X	
9	Rationale for Transferring Sponsorship to CMSD			X
10	School Calendar	X	X	X
11	Academic Program	X	X	X
12	Academic, Organizational, and Financial Goals	X	X	X
13	Professional Development	X	X	X
14	Racial and Socioeconomic Composition	X	X	X
15	Special Student Populations	X	X	X
16	High School Graduation Requirements	X	X	X
17	Business Plan, Organizational Chart, and Staffing Plan	X	X	X
18	School Leadership	X	X	X
19a	Parent and Community Engagement – New School	X	X	
19b	Parent and Community Engagement – Existing School			X
20	Governing Authority	X	X	X
21	Budgets and Budget Narrative	X	X	X
22	Fiscal Soundness	X	X	X
23	Insurance	X	X	X
24	Facilities	X	X	
25	Timeline	X	X	

## **Submitting Your Application to the Cleveland Metropolitan School District**

The first step in applying is submitting an Intent to Apply by August 1, 2018. Please see page 3 of this Application Kit for more details. As you prepare your application, please keep in mind that your answers to the specific requests carry enormous significance beyond determining whether or not you will be granted the opportunity to organize and operate a community school; they may be used to determine the specific terms of your contract and set the conditions of your school's operations. It is therefore critical you not simply provide responses that may sound impressive on paper. All responses should include plans that are reasonable, feasible, and achievable, as the school may be held accountable for commitments made.

### **General Guidance**

- Where a question or section is keyed to a specific statutory provision, the statutory provision appears in brackets. Please note that unless specifically indicated otherwise, all references are to provisions contained within the Ohio Revised Code and Ohio Department of Education documents.
- Each application section request in this document is printed in bold typeface. Immediately following most section requests is additional guidance on responding to the request. In many cases, it will be impossible to provide an adequate and complete response to the request without careful reference to the guidance as well.
- Most sections also indicate the criteria that CMSD's application reviewers will use in analyzing the response.
- Ensure that the application is organized and that all sections are labeled by their title. Any changes could result in the proposal responses not being reviewed.

### **Public Disclosure**

CMUSD will release to the public, upon request, a list of the names of all proposed community schools submitted. Included in this release will be the name of the applicant and public contact information for the proposed school, the contact person, level of proposed enrollment, grades served, management company (if any), and partner organization (if any). While the entire proposal will be available to the public under the Public Records Act [R.C. 149.43], all personal and proprietary information will be redacted as permitted by law.

## Submitting the Proposal

One electronic copy of the proposal is required; please see the section below on Submitting the Electronic Copy for more information. In addition, one paper copy *that is an exact printout* of the electronic version must also be submitted. **Please note: The electronic version of the proposal is regarded as the official submission. Any ambiguity and/or discrepancy between the electronic version and the paper copy submission will always be resolved in favor of the electronic copy.**

1. Please print all pages single-sided (*i.e.*, text on only one side of each page).
2. Each page should contain a footer that includes the proposed school name and should be consecutively numbered. Page numbers should indicate the Section number or Attachment number along with the page number in each section. For example, Section 1-1 would indicate the first section, first page, Section 7-12 would indicate the twelfth page of the seventh section, Attachment 6 B - 6 would indicate the sixth page of Attachment 6 B, etc. The application should be organized so that all the Sections come first, followed by the Attachments.
3. The complete paper application must be included in a three-ring binder or spiral bound with tabs separating sections and attachments. Tabs should be labeled.
4. Each electronic copy of the proposal shall consist of all files containing the narrative organized just as the sections are described in the table below. The table also notes file types acceptable for each response, *e.g.*, Microsoft Word®, Microsoft Excel®, etc.
5. Your proposal ultimately will contain the following:
  - **The Community School Proposal Transmittal Form**, which must be the cover or first page. The Transmittal Form should be completed and signed by the applicant who will serve as the contact for CMSD (the “Applicant Contact”). The original signed form must be submitted with the paper copy of the proposal. This form is available in Appendix A.
  - **Complete Responses to Each Section Request.** Please respond to each request on the form and, where appropriate, provide as much clear information as possible to enhance the reader’s understanding of your proposed community school. As explained in more detail on page 14, replication applicants may refer to contracts or prior applications from schools within the same model being replicated, provided that the instructions on page 14 are followed. Each section should start on a new page to separate it from the prior sections. CMSD requests that you use tabs to separate each section response and attachment. Please label the tabs with the appropriate section or attachment number and/or title.
  - **Responses to Each Attachment Request.** Attachments should follow the response to each Section Request and be labeled as identified below.
  - **All sections identified below.** Even if a request is not applicable to the particular applicant, the applicant must include a response to that section noting, “This Section is Not Applicable.”

## Amending Application After Submission

- **Do not** send unsolicited amendments following submission of your response to the RFP. If you find that you have inadvertently overlooked something or have additional information to submit, please contact Shemekia Love ([Shemekia.Love@clevelandmetroschools.org](mailto:Shemekia.Love@clevelandmetroschools.org)) to determine whether the materials are necessary. If so, we will advise you regarding how and when to submit the material(s). As noted earlier, CMSD may request additional academic information from you.

## When and Where to Submit Applications

- The Intent to Apply for all applicants except those seeking to switch sponsors must be submitted via email by **5:00 p.m. EDT on August 1, 2018**. See page 3 of this Application Kit for more information.
- The complete application (both electronic and paper submission) is due to the Cleveland Metropolitan School District no later than **5:00 p.m. EDT on August 31, 2018**. You may deliver the paper copy and, if using a flashdrive, the electronic version, to CMSD or mail it/them to the following address:

Cleveland Metropolitan School District  
Portfolio Office  
Attention: Shemekia Love  
1111 Superior Avenue, Suite 1700  
Cleveland, OH 44114

- If you choose to submit the electronic version of your proposal by email, please send it to Shemekia Love at [Shemekia.Love@clevelandmetroschools.org](mailto:Shemekia.Love@clevelandmetroschools.org).
- If you choose to submit the electronic version of your proposal on a flash drive, please create a folder on the flash drive called “[School Name] Community School Proposal.” Within that folder, save the **Community School Proposal Transmittal Form**, the main narrative with section titles and formatted as described below.
- **Please be sure if you are using the track changes feature of Microsoft Word® that all changes have been accepted and track changes has been turned off prior to saving.**
- Acceptable electronic formats for the files to be saved are Microsoft Word®, Microsoft Excel®, or Adobe Acrobat® as indicated below. Adobe Acrobat® files are only acceptable when scanning documents is absolutely necessary. When scanned files are submitted in Adobe Acrobat® format, they should be OCR’d (Optical Character Recognition) and Optimized to reduce the file size. Files required to be submitted in Microsoft Word® or Microsoft Excel® may not be submitted in any other format. Please include electronic copies of all sections including all related materials.

***Please contact CMSD at (216) 838-4966 with any questions about electronic formatting requirements.***

## Incorporating by Reference (Replication Applicants Only)

Replication applicants may choose to answer some questions by referring to information from a current charter contract with CMSD or a prior application to CMSD, provided that the information comes from the school model that the application proposes to replicate. Please note that this option is only available in denoted sections of the application.

All documents or portions of documents being incorporated by reference must be submitted along with the application. For example, if the applicant wants to reference the Educational Plan of an existing school from the same model, the applicant must include as an attachment in that same section the relevant portion of the Educational Plan. **The applicant does not need to attach the entire charter contract or even the entire Educational Plan.** Note that all attachments in this section, as with any section, must be labeled as described on page 10 (*e.g.*, Attachment 18B-2). If you have questions about incorporating by reference, please contact CMSD Executive Director of Charter Schools Stephanie Klupinski at (216) 838-0179 or email her at [Stephanie.Klupinski@clevelandmetroschools.org](mailto:Stephanie.Klupinski@clevelandmetroschools.org).

## Charter Application Timeline

Application Released	May 31, 2018
Intent to Apply due	August 1, 2018 (by 5:00 p.m. EDT)
Complete Application due	August 31, 2018 (by 5:00 p.m. EDT)
CMSD Initial Review takes place	September 1 - October 1, 2018
Interviews held	October 2 - 31, 2018
Application decisions made at CMSD Board of Education meeting	By November 30, 2018
Applicants notified of decisions	By November 30, 2018

# **Application for a CMSD-Sponsored Community School**

## **Section Requests & Criteria**



## **Section 1 – Applicant Information**

**Provide background information regarding each applicant.**

Please complete the form located in Appendix B for this section. The form asks for the following information:

- Whether the application is for a New Community School, for a Replication of an Existing School Model, or for Transfer of Sponsorship to CMSD;
- The full legal name of each individual applicant;
- The address, telephone number(s), facsimile number (if applicable), and e-mail address for each applicant;
- Assurance that each applicant is at least 18 years of age. (Not-For-Profit Corporation Law § 1702);
- If there is more than one applicant, that one applicant is designated as the contact person for the proposal (“Lead Applicant”); and
- Background information for each applicant, including whether he or she is a teacher, parent, school administrator, and/or community resident, and if he or she would be a member of the community school’s governing authority. Required background information includes, at a minimum, the applicant’s educational and employment history; curriculum vitae or resumes are preferred.

### **Criteria for Section 1 – Applicant Information**

Reviewers will look for background information that:

- Is presented accurately and truthfully; and
- Answers all the required questions.

## **Section 2 – Executive Summary**

**In no more than 2,000 words, please provide an Executive Summary that lists the core elements of the school. For a new school, describe the school’s target student population and the reason it is likely to meet the needs of those students. For an existing school applying to change sponsors to CMSD, describe the school’s existing student population, extent to which it is meeting the needs of those students, and the reason it believes this is the case. Briefly summarize market research showing how the applicant knows there is demand for this school model in the proposed neighborhood. Also briefly summarize the academic, organizational, governance, and financial designs and explain how they will support school success.**

### **Criteria for Section 2 – Executive Summary**

Reviewers will look for an Executive Summary that:

- For a new school, persuasively describes a need for the proposed model in the neighborhood desired;
- For an existing school proposing to change sponsors to CMSD, persuasively explains how the school addresses a need in the neighborhood it serves;
- Presents a coherent argument as to why the proposed program is likely to meet the needs of students and improve student learning; and
- Effectively summarizes how the academic, organizational, governance, and financial designs will support the success of the school.

### Section 3 – Student Enrollment Plan and Rationale

Use the table to submit enrollment information for the first five operational years of the proposed new school, or, for an existing school proposing to change sponsors to CMSD, the current and next four operational years.

The following information is required:

- Grades that the school serves or proposes to serve;
- Ages of students served or to be served in each grade (for kindergarten, please indicate the date by which a student must turn five in order to be eligible to enroll in the school);
- Number of students expected in each grade and in each class; and
- Total number of enrolled students for each year of the proposed contract term.

Then, please submit a narrative response to this section explaining the rationale used in choosing the grades and ages and growth pattern projected in the chart. Explain reasons for possible attrition in the narrative section and detail any plans to address attrition.

		Number of Students				
		Year 1 20__-__	Year 2 20__-__	Year 3 20__-__	Year 4 20__-__	Year 5 20__-__
Grades	Ages					
Entrance date for K: _____						
K						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
<b>Total students</b>						
Number of classes per grade						
Avg. number of students per class						

### Criteria for Section 3 – Student Enrollment Plan and Rationale

Reviewers will look for an enrollment plan and rationale that:

- Align with the school’s stated mission;
- Promote continuity of educational experience;
- Contribute to attracting and retaining students for a sustained number of years; and
- Are reasonable and address any possible attrition.

## **Section 4 – Simultaneous Submissions to Other Sponsoring Entity**

**Indicate whether the applicant has also applied to a sponsor other than CMSD.**

If so, provide the name of the other sponsor or sponsors, the date(s) submitted, and the status of the application. If the application was denied by a sponsor other than CMSD, provide a copy of the letter from the sponsoring entity stating the reasons for denial. If the application was withdrawn from a sponsor’s consideration, please provide the reasons for the withdrawal. If the application was granted, but the applicant is considering other sponsors, please provide an explanation as to what the applicant is seeking from a sponsor. If the applicant is pending, please note.

*Note: There are no defined criteria for this response other than to fully explain the status of any simultaneous or prior submissions of the same community school application.*

**Section 5 – Sponsor Status of Other Schools in School Model**

If applicable, please use the chart below to indicate the sponsors and contract terms of other schools in the school model seeking to replicate, including any school whose contract has expired or has been non-renewed.

Name of School	Name of Sponsor	Date School Opened	Date Current Contract Expires or Expired*

\*If any school in the model has a contract that has expired and has not been renewed, please explain in this section the circumstances surrounding the termination or non-renewal.

*Note: There are no defined criteria for this response other than to fully explain the sponsor and contractual status of other schools in the model.*

## **Section 6 – Affiliated Organization Information**

**If you are filing a proposal in conjunction with, or if the existing or proposed school has or is likely to have a key affiliation with, a college, university, museum, educational institution, a not-for-profit corporation with 501(c)(3) tax-exempt status under the Internal Revenue Code, or a for-profit entity, including a charter network operator, charter management organization, or education management organization, please provide the information listed below for each such entity:**

- Name of the affiliated organization;
- Proof of the legal status of the affiliated organization (*e.g.*, not-for-profit corporation, university, corporation, etc.) and whether or not the organization has authority to do business in Ohio;
- If applicable, proof of tax-exempt status under Internal Revenue Code section 501(c)(3);
- Letter of intent or commitment from a representative of the affiliated organization indicating that the organization will be involved in the community school and the terms and extent of its involvement;
- Name of a contact person for the affiliated organization, along with the person's address, phone number, facsimile number (if applicable), and e-mail address;
- Description of the nature and purpose of the proposed school's relationship with the affiliated organization; and
- Description of how the governing authority will oversee and/or manage the relationship with the affiliated organization to ensure the school posts strong evidence of success.

*Please note the following in responding to this section:*

- *If you are not filing in conjunction with any affiliated organization as described above, please so indicate in your response and proceed to the next section.*
- *You may file an application with many different types of affiliated organizations. For CMSD's purposes in considering your application, these affiliated organizations generally fall into three categories: a community partner or not-for-profit organization that offers goods or service free of charge; a partnership with an organization that charges fees for services; or a management organization that takes a flat percentage of the school's income and in exchange provides services that can include staffing, training, providing materials, etc.*
- *A management organization differs from a partner entity in that the former contemplates entering into a contractual, fee-based relationship with the community school pursuant to which the management organization takes day-to-day responsibility for and management of the community school's educational program and/or other aspects of the school. As set forth in the request, if you are filing in conjunction with a management organization that takes a flat percentage fee (and are not filing in conjunction with any other community or fee-based*

organization partners), you should respond as indicated here. In addition, please direct the reader to the appropriate information included in the Attachments by stating, “See Attachment X, Y, and Z for information on the management organization.” Remember to label the attachments as described on page 10. Complete those attachments and proceed to the next section. Note further that although management organizations typically are contractually bound to provide management services to the community school, it is still the community school’s governing authority that is ultimately responsible for ensuring that the school operates in a legally and fiscally prudent manner. More importantly, it is the school’s governing authority that is responsible for overseeing the academic success of the school and holding the management organization responsible for that success.

- *The letter of intent or commitment that you are required to provide from each partner organization must specify any services (for a fee or otherwise) or financial or other assistance that the partner has agreed to provide and that you have represented will be provided. If the partner organization will be receiving funds from the community school, the organization must have authority to do business in Ohio as an Ohio legal entity. If you represent that the school will be receiving a service for free or at a reduced rate from the partner organization, the letter from the partner must so indicate. For example: if you elsewhere claim in this community school proposal that tutors will be provided by a university partner on a volunteer basis, and those tutors are a component of your remedial education program, the university partner must provide a firm written commitment to provide such tutors. If this commitment is not provided, CMSD’s financial analysis will take that omission into consideration when analyzing the financial plan’s ability to realistically support the claims in the community school application.*
- *Depending on the extent of the proposed partner organization’s involvement with the proposed community school, CMSD may request that the partner organization complete a Due Diligence Questionnaire just as a proposed management organization is required to do. This request will be made after the initial proposal review conducted by CMSD.*
- *An applicant is best served by submitting a proposal in conjunction with only those entities that are committed to providing a substantial and tangible benefit to the proposed community school. Indeed, in the eyes of the proposal reviewers, an applicant’s credibility may suffer when he or she provides a list of partners that add little or nothing to do with the proposed school. In other words, quality, not quantity, is key.*
- *Not every community organization relationship requires that those organizations be identified formally as partners. For instance, if you plan on frequent field trips to local museums, those museums need not file a proposal in conjunction with this application.*

### **Criteria Section 6 – Affiliated Organization**

Reviewers will look for a response that indicates a thoughtful and detailed partnership relationship wherein the school’s governing authority holds or will hold the affiliated organization accountable for student achievement results and, specifically, is empowered, both formally and plausibly as a practical matter, to take action to sever the affiliation if the governing authority determines that it is not beneficial to continue the affiliation.



## **Section 7 – Capacity to Replicate**

**If this application is for the replication of an existing school model, please describe the school model's short- and long-term replication plans for Cleveland and the State of Ohio and how this applicant school fits into the larger plans for the school model and the operator.**

Please describe:

- The business or growth plan for the existing school model;
- Any research that specifically relates how the applicant school advances the goals of the Cleveland Plan and other citywide high-quality educational access plans (Questions regarding how this application impacts other existing schools in the school model are addressed in Section 17);
- What resources your group has to replicate the school for which you are currently applying;
- What additional resources you think you will need in the future for your long-term replication goals;
- In detail, what makes the current schools in the school model successful and the processes in place that will recreate the success in the proposed school; and
- Any significant challenges or concerns with current schools in the school model and address the steps that are being taken to address them.

Please note that the following section will probe in more detail the academic, financial, and organizational performance of schools in the school model. Do not duplicate those responses here; instead, please discuss any other concerns or challenges (for example, teacher recruitment, facilities costs, etc.)

### **Criteria Section 7 – Capacity to Replicate**

Reviewers will look for a response that shows:

- A thoughtful short- and long-term replication plan;
- Thoughtful research and analysis underpinning how this application fits into the larger plans for the school model and the operator;
- A compelling argument that replication of the school model will be successful; and
- An honest and realistic appraisal of the status of the existing schools in the school model seeking to replicate.

## **Section 8 - Performance Rationale for Replication**

**If this is an application for replication of an existing school model, please submit an Existing School Data Workbook following the directions provided in Appendix C. Please provide the other information described in this section to provide achievement and performance data related to existing schools currently managed by the applicant.**

In the “model” sheet of the workbook, please include information about all schools in your current community school network that follow the same school model as is proposed for this school. In the “network” portion, please include information about all the schools in your current network. Please write “N/A” if a school was not open for a year requested or if you do not yet have the requested data from the state.

Next, for each of these same schools, please submit:

1. Minutes from meetings of the school’s governing authority from July 1, 2017 through the most recently board-approved minutes. Only submit minutes for the school model being replicated; and
2. The four most recent quarterly financial statements and most recent annual financial audit.

Finally, please craft a narrative for this section and provide explanations related to these schools for:

1. Positive, negative, stable, and/or inconsistent academic trends related to:
  - a. Leading indicators;
  - b. Growth; and
  - c. Achievement;
2. Differences in performance levels among schools within the same academic model;
3. How existing fiscal and human resources will be used to ensure that performance for new schools and existing model schools at least continue to meet current levels; and
4. Any reports, notices, or findings of legal or contractual noncompliance or other deficiencies as to the school or its operator, and information on how these notices, issues, or findings were remedied.

Please note, as stated in the Introduction, that CMSD also will interview the applicant and the school’s current sponsor, and if applicable and at CMSD’s discretion, past sponsor(s), as well as review sponsor compliance reports.

## Criteria Section 8 – Performance Rationale for Replication

Reviewers will look for a response that:

- Provides complete data for all schools and all available years in the required format;
- Provides evidence of sound governance of other schools managed by the network and/or following the same school model;
- Provides evidence of sound financial management of other schools in the network and/or following the same school model;
- Provides a thoughtful reflection on performance results and trends in all requested areas, and how these trends can speak to future performance at the proposed school;
- Explains differences in performance within the same academic model/ framework;
- Considers how prior attempts at model expansion, if undertaken, have performed relative to more mature model/network schools;
- Reflects a record of compliance, and/or acknowledges any past deficiencies and explains their resolution, in a way that inspires confidence that similar issues will be avoided for the proposed school;
- Identifies how potential challenges could impair performance at the proposed school and includes plans to overcome such challenges; and
- Is not outweighed by considerations that come to light as a result of the interview of current and/or past sponsors.

*NOTE: In furtherance of the goals of the Cleveland Plan, this section is assigned extra weight in scoring.*

## **Section 9 – Rationale for Transferring Sponsorship to CMSD**

**If the application proposes to transfer the sponsorship of an existing school to CMSD, please submit an Existing School Data Workbook using the directions provided in Appendix C, and provide the other information described in this section to provide achievement and performance data related to the school.**

**If the applicant is proposing the transfer of a school that is part of an existing educational model or is managed by a charter management organization (CMO), the applicant must also complete Section 8, above, as to the other schools in the model or network and/or those managed by the network or CMO.**

Please submit the following:

1. Minutes from meetings of the school’s governing authority from July 1, 2017 through the most recently approved minutes; and
2. The school’s four most recent quarterly financial statements and most recent annual financial audit.

Next, please craft a narrative for this section and provide explanations related to the school for:

1. The applicant’s rationale for transferring the school’s sponsorship to CMSD;
2. Positive, negative, stable, and/or inconsistent academic trends related to:
  - a. Leading indicators;
  - b. Growth; or
  - c. Achievement;
3. How existing fiscal and human resources will be used to ensure that the performance for the school continues at least to meet current levels; and
4. Any reports, notices, or findings of legal or contractual noncompliance or other deficiencies as to the school or its operator, and information on how these notices, issues, or findings were/are being remedied.

Please note, as stated in the Introduction, that CMSD also will interview the applicant and the school’s current sponsor, and if applicable and at CMSD’s discretion, past sponsor(s), as well as review sponsor compliance reports.

## Criteria Section 9 – Rationale for Transferring Sponsorship to CMSD

Reviewers will look for a response that:

- Provides a satisfactory rationale for switching sponsors;
- Provides complete data for all available years in the required format;
- Provides evidence of sound governance of the school;
- Provides evidence of sound financial management of the school;
- Provides a thoughtful reflection on performance results and trends in all requested areas, and how these trends can speak to future performance at the proposed school;
- Reflects a record of compliance, and/or acknowledges any past compliance issues, and explains their resolution in a way that inspires confidence that similar issues will be avoided for the school after the transfer of its sponsorship to CMSD;
- Identifies how potential challenges could impair performance at the school and includes plans to overcome such challenges; and
- Is not outweighed by considerations that come to light as a result of the interview of current and/or past sponsors.

## **Section 10 – School Calendar and Daily/Weekly Schedule**

**It is important for CMSD to understand how the daily and weekly school calendar deploys or will deploy the curriculum. Further, CMSD needs to ensure that the school calendar meets the statutory requirements for hours of instruction. For more information on classroom-based and non-classroom-based learning opportunities, please see section 3314.08 (H) (2) of the Ohio Revised Code.**

Present a current or proposed school calendar showing:

- The number of days the school is or will be in session;
- Sample daily or weekly class schedules for each grade showing daily hours of operation and subject areas addressed; and
- Allocation of time for core instruction, supplemental instruction, extracurricular activities, etc., as applicable.

### **Criteria Section 10 – School Calendar & Daily/Weekly Schedule**

Reviewers will look for a response that:

- Shows a school year, school day, and overall calendar that complies with state law;
- Supports the school’s stated mission, supports strong academic performance for all students; and
- Provides for the staffing, activities, and programs identified in the application.

## **Section 11 – Academic Program**

**CMSD is interested in understanding the applicant school’s mission, vision, and educational philosophy.**

Please describe:

- The school’s mission, vision, and educational philosophy;
- The curriculum, instructional methods, and promotion policy; and
- In detail, how these elements of the school meet or are likely to meet the needs of the expected student body.

Replication applicants that are part of a model with other schools sponsored by CMSD may refer to prior applications or current charter contracts here. For more information, please contact Stephanie Klupinski at [Stephanie.Klupinski@clevelandmetroschools.org](mailto:Stephanie.Klupinski@clevelandmetroschools.org).

*Example response from such a replication applicant:*

*For a description of the proposed school’s mission and philosophy, please see the Educational Plan of the Charter Contract from another school in the model. This can be found in Attachment 10A of this Section of the application. Our curriculum, instructional methods, and promotion policy are described in a prior charter application, also available here in Attachment 10B. There will be no substantial differences in the proposed school’s mission, philosophy, or academic program. The vision for this school is that it will provide a high-quality option for the grade levels served in a neighborhood that currently lacks any high-quality options for those grades.*

### **Criteria for Section 11 – Academic Program**

Reviewers will look for an academic plan and rationale that:

- Effectively describe the school’s mission, vision, and educational philosophy;
- Provide specific and detailed information as to why the school design is likely to result in high student achievement; and
- Connect the design of the school to the needs of the community it intends to serve.

## **Section 12 – School Academic, Organizational, and Financial Goals**

**CMSD-sponsored charter must adhere to a performance framework. The current performance framework used for most CMSD-sponsored schools can be found on our website at <http://www.clevelandmetroschools.org/Page/6133>.**

After reviewing CMSD's performance framework, the applicant should create at least four school-specific goals aligned to the mission and vision of the school. These goals should not duplicate goals within CMSD's performance framework.

Use the chart below to list the goals for the school. Goals must include indicators, measures, metrics, and targets, as defined below. Please see the example on the following page.

**Indicators.** Indicators represent general dimensions of academic quality or achievement, such as “Postsecondary Readiness and Success.”

**Measures.** Measures are general instruments or means to assess performance in each area defined by an indicator. Measures require the application of specific metrics or calculation methods (see below). For example, a measure of postsecondary readiness is high school completion.

**Metrics.** Metrics specify a quantification, calculation method, or formula for a given measure. For example, the typical high school completion metric is a graduation rate, such as “the percentage of ninth-graders graduating in four years.”

**Targets.** Taking metrics a step further, targets are specific, quantifiable objectives that set expectations or define what will constitute success on particular measures over multiple years. For example, a graduation-rate target might be “90% of ninth-graders graduating within four years.” Likewise, state-mandated performance levels are common targets. Having well-conceived and well-defined performance targets is important to achieve and evaluate school success.



## Academic Goal Sample

Indicator	Measure	Metric	Target
<b>Student Academic Performance (Status)</b>	Proficiency Levels on State Assessments by Grade and By Subject	Percentage of students at proficient	<b>Year One</b> – Baseline <b>Year Two</b> – 20% improvement over baseline scores <b>Year Three</b> – 15% improvement over Year Two scores <b>Year Four</b> – Half the difference from Year Three Scores and 100% proficient <b>Year Five</b> – Half the difference between Year Four scores and 100% proficient

### Criteria Section 12 – School Goals

Reviewers will look for goals that:

- Do not duplicate goals within CMSD's performance framework;
- Include indicators, measures, metrics, and targets, as defined in this Application Kit;
- Convey a genuine commitment to accountability for results;
- Provide evidence of how these goals are attainable and how the school possesses or is likely to possess the competence to achieve those results;
- Are clear, measurable, and data-driven; and
- Are consistent with mission and program of the applicant school.

*NOTE: In furtherance of the goals of the Cleveland Plan, this section is assigned extra weight in scoring.*

## **Section 13 – Professional Development**

**Describe how the school’s professional development program assists or will assist teachers in meeting student academic needs and school goals by addressing identified shortcomings in student learning and teacher pedagogical skill and content knowledge.**

Indicate how the school’s professional development plans ensure or will ensure that the school attracts, trains, and retains, as well as retools, staff to ensure that classroom instruction is rigorous in its pursuit of ensuring students meet Ohio state standards.

Replication applicants that are part of a school model that includes existing schools sponsored by CMSD may refer to prior applications or current charter contracts here.

*Example response for such a replication applicant:*

*For a description of the proposed school’s professional development program, please see the description from a prior charter application, available here in Attachment 12A.*

### **Criteria Section 13- Professional Development**

Reviewers will look for a response that:

- Is linked to the mission of the school as well as state curricular and assessment demands;
- Provides details necessary to determine that the school has earmarked sufficient resources to support the program;
- Reflects the ongoing support and training for novice teachers;
- Is linked to student academic needs, not adult interests;
- Is evaluated regularly and systematically to determine its effectiveness;
- Indicates strong alignment between the culture the school provides or proposes to create and the academic results demanded by CMSD; and
- Includes specific strategies, staffing structures, and supports to ensure that students with disabilities will succeed as do students as a whole at the school.

## **Section 14 – Racial and Socioeconomic Composition**

**Cleveland schools serve high concentrations of students who are members of disadvantaged socioeconomic and racial populations. Poverty and racial isolation create substantial challenges to a school’s ability to provide an excellent education. In order to attain the goals of The Cleveland Plan, CMSD is particularly interested in sponsoring schools that are able to achieve excellent academic results despite these challenges.**

Please identify the number and percentage of students enrolled or expected to enroll at the school who are or will be Cleveland residents. Identify or estimate student demographics for the entire school, including percentages by race, gender, socioeconomic status, participation in special education, limited English proficiency, and homelessness.

Then, please compare this actual or projected demographic information to the neighborhood where the school is or plans to be located. If the comparison reveals disparities in the enrollment demographics, please provide an explanation for the disparities.

If the applicant serves or anticipates serving a high proportion of economically disadvantaged students and/or students who belong to disadvantaged racial populations, describe how the school addresses or will address any academic challenges it anticipates will be posed by the concentration of poverty and/or by racial isolation among its students.

If the applicant serves or anticipates serving a more socioeconomically diverse student population, describe how the school offers or will offer the instruction necessary to ensure that students with a wide range of academic and other needs all achieve to high standards and reach their maximum academic and developmental potential.

### **Criteria Section 14 - Racial and Socioeconomic Composition**

Reviewers will look for a response that:

- As applicable to the application, reflects sound analysis, research, and/or reasoning behind the reasons for the school’s current or expected enrollment composition;
- Reflects thoughtful consideration of, and an understanding of, likely or actual educational challenges that may be associated with the actual and/or anticipated enrollment composition; and
- Provides credible plans for meeting these challenges.

*NOTE: In furtherance of the goals of the Cleveland Plan, this section is assigned extra weight in scoring*

## **Section 15 – Special Student Populations**

**Briefly summarize how the school is meeting or will meet the needs of each of the following populations.**

Please include the services that the school makes or will make available for each population, and if applicable, identify services that are being or will be contracted:

- Students with disabilities;
- Gifted students;
- Limited English Proficient students; and,
- Homeless students.

For replication applicants, detail any challenges other schools in the school model have faced meeting the needs of these groups of students, and, if applicable, describe how these challenges have been met and/or the proposed school will be better prepared to meet the students' needs. Applicants that are part of a school model with other schools already sponsored by CMSD may refer to prior applications or current charter contracts here, as appropriate.

### **Criteria Section 15 – Special Student Populations**

Reviewers will look for a response that:

- Provides assurance of a strong understanding of special student population needs and requirements under state and federal law;
- Is detailed, going beyond boilerplate policy language, to indicate detail regarding how the applicant's program meets or will meet the needs of special student populations; and
- Presents an honest assessment, if the school or proposed school is part of a school model, of that school model's past record and current ability to meet the needs of special student populations and explains how any past or current concerns will be addressed by the school.

## **Section 16 – High School Graduation Requirements**

**If the school serves, or the proposed school will serve, high school students, please provide the school's graduation requirements. Ensure that the graduation requirements comply with those determined by the Ohio Department of Education. Include the school's requirements for diploma and diploma with honors.**

*Note: If the school or proposed school does not plan to serve high school students, please indicate that as the response to this section.*

Reviewers will look for a response that:

- Adheres to the state's graduation requirements; and
- Includes requirements for diploma and honors diploma.

## **Section 17 – Business Plan, Organizational Chart, and Staffing Plan**

**Provide a business plan, organizational chart, and staffing plan for the school. For a new school, the plan and chart should identify plans for the first five years of the school’s operation and reflect the needs of the academic program described in the application. For an existing school, the plan and chart should reflect the current structure of the school and anticipated changes during the next five years. Plans and chart should align with the budget presented in the application.**

The business plan should provide a formal statement of business goals and plans for reaching them for the first five years (or for an existing school, the next five years) of the school’s operation, with reference to the academic, financial, and operational position of the school during that time period. The plan should explain why the applicant believes the business goals are attainable.

The organizational chart and staffing plan should support the goals of the business plan and should clearly indicate the reporting structure of staff to the governing authority, and of the staff to the school leader(s). If the charter school contracts or partners, or intends to contract or partner, with an entity for management or educational services, the organizational chart should also reflect that relationship, and the narrative should include a discussion of the role of the management or partner organization.

### **Criteria Section 17 – Business Plan, Organization Chart, and Staffing Plan**

Reviewers will look for a response that:

- Sets forth business goals for the first five years of the school’s operation, or for an existing school, the next five years, that are clear and relate to the academic, financial, and operational position of the school during that time period;
- Uses data to explain convincingly why the applicant believes the business plan goals are attainable;
- Addresses recruitment, selection, training and retention of individuals and considers need, capacity, and financial and human resources;
- Provides a clear delineation of the roles and responsibilities for administering the day-to-day activities of the school;
- Demonstrates understanding of management needs and priorities;
- Has a staffing and leadership structure designed to successfully implement the school design; and
- Has a staffing plan that appears viable and adequate for effective implementation of the proposed educational program.

## **Section 18 – School Leadership**

**CMSD wants to know about the leadership for the applicant school.**

Please provide the following information for the applicant school:

- Describe the characteristics of the school leader or leaders currently retained or planned for the school;
- Indicate why that leadership design was selected and how it supports strong school performance;
- Provide the attributes identified by the governing authority as central to the selection of a person to lead the school; and
- If the school already employs, or already has selected, a leader, include that person’s curriculum vitae or resume and provide insight as to why the governing authority selected that individual.

Replication applicants that are part of a school model that includes other schools sponsored by CMSD may refer to prior applications or current charter contracts here, as appropriate.

*Example response from such a replication applicant:*

*For a description of the essential attributes needed for our school leader please see the description available in Attachment 16A. This description was included in a prior charter application. Although we will make slight updates to the description, the job qualifications and attributes will largely remain the same.*

### **Criteria Section 18 – School Leadership**

Reviewers will look for a response that:

- Indicates the founders have identified key elements necessary for strong school leadership;
- Demonstrates a link between the attributes of leadership sought by the school and the program described in the application; and
- For a new school, conveys a likelihood that the attributes of school leadership and the leadership structure will assist the school in avoiding challenges related to school start up.

## **Section 19a – Parent and Community Engagement - New School**

**CMSD wants to locate new schools where they meet the needs of neighborhoods, particularly contributing to the Cleveland Plan’s goals of ensuring that families in every Cleveland neighborhood have choices among high-performing public schools. For schools to be successful, they must engage community stakeholders and build parent and student interest in the proposed educational model.**

For new schools, CMSD seeks evidence that the applicant has considered the needs and demographics of the neighborhoods where the proposed school is to be located and that the proposed school is consistent in advancing the Cleveland Plan. CMSD will consider applications from proposed schools in any Cleveland neighborhood but wants to improve the alignment between proposed schools and community needs.

Please provide the following information:

- Review the CMSD Strategic Regional Analysis (SRA). Please contact our office for the most recent analysis. Consider the proposed school’s proposed location and explain how it meets this documented community need and how the proposed school and its proposed location otherwise will advance the goals of the Cleveland Plan.
- Describe the applicant’s use of market research and analysis to inform its enrollment projections and its siting decision.
  - Market research should include:
    - Analysis of student and student subgroup(s) academic needs to be served by the proposed community school that are not currently being met;
    - Demonstrated demand for the proposed community school; and
    - Evidence of data collection and analysis in the following areas: real estate market (rental property, insurance rates, property taxes), availability of transportation (*e.g.*, bus lines), enrollment fluctuation in surrounding schools, job growth, number and age range of students in the surrounding area of the proposed facility, crime rates, etc.
- Complete the Parent and Community Engagement form located at Appendix D. To complete the form, applicants are required to do the following:
  - Hold a minimum of one community meeting to share plans for the proposed school in the neighborhood where the school is to be located. This meeting may occur as part of a standing block club meeting or other regularly scheduled community discussion. Please provide a copy of the marketing flyer for the meeting and any materials that were presented. Provide a narrative summarizing community feedback and how that input impacted planning efforts for the proposed school.
  - During these community dialogues, capture last names, zip codes, and current grade levels for families that have expressed interest in attending the proposed



charter school. CMSD has no minimum required interest level but wants the applicant to present evidence of good faith efforts to develop interest for the proposed educational model. Include this list in your response to this section.

- Indicate how the school, after opening, will continue to engage parents and the community in supporting its academic and overall success. Identify the type and frequency of parent engagement opportunities. Detail how the school builds and maintains family-school partnerships that strengthen support for student learning.
- List any community partners the school may have developed and describe their role in contributing to the school's and the students' success. Include letters of support or other information to support the plans outlined in the proposal.
- In addition, CMSD strongly encourages the following, with documentation to be submitted with the Parent and Community Engagement Form at Appendix D:
  - Meeting with the City of Cleveland Council Member representing the ward where the school is to be located. As a result of the meeting, please request a letter of support for the proposed school.
  - Meeting with the nonprofit Community Development Corporation representing the neighborhood where the school is to be located. As a result of the meeting, please request a letter of support for the proposed school with specific details about how the organization will support the school and its enrollment efforts.

### **Criteria Section 19a - Parent and Community Engagement - New School**

Reviewers will look for a response that:

- Demonstrates applicant understanding of the goals of the Cleveland Plan and existing analyses that document the need for additional high-performance seats in the neighborhood selected;
- Shows strong evidence of parent demand for the school;
- Provides evidence of community support that supports claims made in the application; and
- Indicates parent and community support that will directly benefit the school's ability to meet its academic, organizational, and financial goals.

*NOTE: In furtherance of the goals of the Cleveland Plan, this section is assigned extra weight in scoring.*

## **Section 19b – Parent and Community Engagement - Existing School**

**CMSD wants to ensure that existing schools are aware of, and contributing to, the Cleveland Plan’s goals of ensuring that families in every Cleveland neighborhood have a choice of high-performing public schools. For schools to remain successful, they must continue to engage community stakeholders and sustain interest in their educational model.**

For existing schools applying to transfer sponsorship in CMSD, CMSD seeks evidence that the applicant understands the needs and demographics of the neighborhood where the school is located and the neighborhoods it serves and can articulate how the school currently advances, and/or could advance, the goals of the Cleveland Plan. CMSD will consider applications to transfer sponsorship submitted by existing schools in any Cleveland neighborhood but wants to improve the alignment between high-quality schools and community needs.

Please provide the following information:

- Review the CMSD Strategic Regional Analysis (SRA). Please contact our office for the most recent analysis. Consider the school’s location and the neighborhood(s) and students it serves and explain how it meets this documented community need and how the school and its location otherwise advance—and/or how the applicant proposed they will advance—the goals of the Cleveland Plan.
- Describe the applicant’s use of market research and analysis to inform its enrollment projections.
  - Market research should include:
    - Analysis of student and student subgroup(s) academic needs served by the school that the school currently is meeting, as well as needs that are not being met;
    - Demonstrated continued demand for the school; and
    - Evidence of data collection and analysis in the following areas: real estate market (rental property, insurance rates, property taxes), availability of transportation (*e.g.*, bus lines), enrollment fluctuation in surrounding schools, job growth, number and age range of students in the surrounding area of the proposed facility, crime rates, etc.
- Indicate how the school engages parents and the community in supporting the school’s academic and overall success. Please identify the type and frequency of parent engagement opportunities. Detail how the school builds and maintains family-school partnerships that strengthen support for student learning.
- List any community partners the school has developed and describe their role in contributing to the school’s and the students’ success. Include any agreements, memoranda of understanding, letters of support, or other information that help document these partnerships.
- Describe any meetings, school site visits, or other interactions the school has had

- with the City of Cleveland Council Member representing the ward where the school is located.
- Describe any meetings, school site visits, or other interactions the school has had with the nonprofit Community Development Corporation representing the neighborhood where the school is located.

### **Criteria Section 19b - Parent and Community Engagement - Existing School**

Reviewers will look for a response that:

- Demonstrates applicant understanding of the goals of the Cleveland Plan and existing analyses that document the need for additional high-performance seats in the neighborhood selected;
- Shows strong evidence of continued and sustainable parent demand for the school; and
- Indicates parent and community support that will directly benefit the school's ability to meet its academic, organizational, and financial goals.

*NOTE: In furtherance of the goals of the Cleveland Plan, this section is assigned extra weight in scoring.*

## Section 20 – Governing Authority

**Please complete the chart below listing the members and/or proposed members of the governing authority for the school, indicating any ex-officio members. If any seat is proposed to be non-voting, please indicate so, but understand that such persons will not count toward the minimum number of members needed (five) nor toward quorum.**

Ex-officio seats are voting seats unless they are specified as non-voting. Please note that any one person can only serve on a maximum of five community school governing authorities. Also please read Section 3314.02 (E) of the Ohio Revised Code, which provides additional information on requirements for persons wishing to serve on the governing authority.

Please also indicate any vacant positions expected to be filled. If all members have not yet been identified, please provide the qualifications, attributes, and characteristics required for membership.

Next, please indicate whether CMSD already has a “Request for Information: Governing Authority Member Disclosure Form” for each governing authority member and prospective member. If so, you do not need to submit these again. If not, please provide the form included in Appendix E of this document for each member and include a resume, bio, or curriculum vitae for each member or prospective member.

Finally, please also attach the bylaws for the Governing Authority of the school or proposed school and the school's 501(c)(3) documentation.

Name	Position on Governing Authority	Committee affiliations, if applicable ( <i>e.g.</i> , finance, governance, etc.)	Voting member? (Y or N)	Number of community school governing authorities on which currently serving	Does CMSD already have a "Request for Information" form for this member or proposed member?

## Criteria Section 20 – Governing Authority

Reviewers will look for a response that:

- Includes a completed disclosure form (see Appendix E) for each current governing authority member or expected prospective member, along with a resume, bio, or curriculum vitae;
- Indicates that the members serving or intending to serve on the governing authority have a balanced mix of skills and knowledge including, but not limited to, knowledge of academically successful schools, data analysis, non-profit governance, education and other municipal law, finance, real estate, etc.; and
- Demonstrates that the governing authority has or will have the expertise and capacity to perform its legal responsibilities.

## **Section 21 – Budgets and Budget Narrative**

**Applicants are required to use CMSD’s Community School Budget Template. That template is available in Appendix F, as well as in electronic format. Use the budget templates and provide first-year/current year and five-year budget projections. The mandatory budget and cash flow templates are provided.**

Assumption columns are available within the file for comments. In addition to line item comments, provide a full budget narrative outlining all assumptions underlying budgetary projections. If the budget includes any private contributions, grant funds, or other philanthropic funds in the school budget, please provide letters of commitment from the funding sources detailing the amounts and uses for the funding.

*Please note the following:*

- *The Start-Up budget refers to the period of time before the school officially opens. The budget for this period should show revenues and expenditures the school anticipates receiving and incurring while getting the school up and running. The typical start-up period usually consists of the six to eight months prior to receiving the first per pupil aid payment each October.*
- *The Cash Flow Start-Up & Pre-opening Period is a cash flow projection that should reflect a well thought-out timetable of anticipated receipts and outlays on a month-by-month basis. This monthly cash flow should ideally match the “Start-Up” budget.*
- *The Year One Budget & Assumptions refer to the first year the school will be in operation. This is arguably the most fiscally crucial year in the initial charter term. The template for year one will require prospective schools to break down the budget into programs (i.e., regular education, special education, and other) and support services (i.e., fundraising, management, and general). In addition to the budget, be sure to include all assumptions used in all calculations. A budget without a full set of stated assumptions cannot be meaningfully reviewed.*
- *The Year One Cash Flow is a cash flow projection for the school’s first year that should reflect a well thought-out timetable of anticipated receipts and outlays on a month-by-month basis. The totals in this template should match the year one budget totals and assumptions. Due to the importance of the first operational year, it is crucial that potential schools think about and plan out every month to ensure fiscal stability.*
- *The Five Year Budget and Cash Flow Adjustments is a five-year outlook for a potential school for the first five years of school operation. Schools should complete this tab and include all assumptions for calculations used in years two through five in the column/space provided. Adjustments that affect cash flow (depreciation, capitalized*

*expenditures, etc.) can also be made to the bottom of the template so an accurate depiction of actual cash flow can be shown.*

- *When preparing budgets and cash flows, schools should not include federal Charter School Program (CSP) Grant funds that have not been awarded. Schools should present a sound operational model based on the operational funding it will receive based on enrollment. The federal CSP grant is highly competitive, and there is no guarantee a school will receive an award and funding.*

### **Criteria Section 21 – Budgets and Budget Narrative**

Reviewers will look for a response that:

- Presents budget priorities that are consistent with and support key parts of the plan, including the school’s mission, educational program, staffing and facility;
- Presents realistic, evidence-based revenue and expenditure assumptions, including for any plan to incur and repay debt;
- Presents viable strategies for meeting potential budget and cash flow challenges, particularly for the first year of operation; and
- Demonstrates a commitment to maintaining the financial viability of the school.

## **Section 22 – Fiscal Soundness**

**Provide an overview of fiscal policies and procedures the school uses or will institute to ensure compliance with required Generally Accepted Accounting Principles (GAAP) or other principles as defined by the Ohio Revised Code for community schools.**

The Ohio State Auditor office has outlined the major required code sections in the 2018 Ohio Compliance Supplement Compliance Guide under Exhibit 5, Matrix 3, which can be found on the State of Ohio’s website at:

[https://www.ohioauditor.gov/references/compliancemanuals/2018/OCSImplementationGuide\\_2018.pdf](https://www.ohioauditor.gov/references/compliancemanuals/2018/OCSImplementationGuide_2018.pdf)

Fiscal policies and procedures should also include various other policies and procedures which fall under Ohio Revised Code Section 3314. Fiscal policies and procedures should be sound and have strong internal controls.

If applicant is an existing community school seeking to transfer to CMSD as a sponsor, please provide the three latest audit reports with management letters. For any management letter comments from the auditor, please provide a corrective action plan.

### **Criteria Section 22 – Fiscal Soundness**

Reviewers will look for a response that:

- Provides sound fiscal policies and procedures that comport with the requirements of Ohio Rule and Law;
- Is characterized by sound, strong internal controls;
- Is feasible given the staffing structure provided; and
- Includes a strong description as to how the governing authority and school finance personnel will monitor the effectiveness of the policies, procedures, internal controls, and staffing structure.



## **Section 23 – Insurance**

**State the applicant school’s approach to minimizing liability of the community school, its governing authority members, and employees.**

CMSD requires the schools that it sponsors to obtain at least the following coverage:

- Commercial General Liability policy that expressly covers Corporal Punishment Liability and Athletic Participation Medical Liability;
- Commercial general liability insurance with limits of one million dollars (\$1,000,000) per occurrence and two million dollars (\$2,000,000) aggregate;
- Automobile liability insurance of one million dollars (\$1,000,000);
- Employee dishonesty insurance with limits of five hundred thousand dollars (\$500,000); and
- Educators’ legal liability insurance (which shall include coverage of trustees and officers of Community School) with limits of one million dollars (\$1,000,000) for each claim and two million dollars (\$2,000,000) aggregate.

For a new school or a replication school, please list the providers from which the governing authority will seek coverage. For an existing school applying to change sponsors to CMSD, please submit evidence of the coverage detailed above.

Please note that CMSD must be listed as an additional named insured on each of these insurance policies.

Applicants that are part of a school model with existing schools sponsored by CMSD may refer to prior applications or current charter contracts here, as appropriate.

### **Criteria Section 23 – Insurance**

Reviewers will look for a response that completely addresses the identified requirements and indicate the governing authority’s diligence in working to protect the school.

## **Section 24 – Facilities**

**If the school currently occupies and/or has identified a future facility, describe the facility and its location, including the address, site plan, and floor plan (include the number and size of the classrooms, common areas, recreational space, and any residential facilities that will also be used by the school). Indicate whether the property and/or facility will be leased or purchased.**

If the facility has been or will be purchased, please provide the following information:

- Cost of the land and building;
- Contract information for the entity or individual that will own the property;
- Whether the facility is a new construction or a retrofit;
- How the new construction or retrofit will be financed;
- Whether the owner is a party to this application;
- Conflicts of interest, if they exist;
- A copy of the mortgage or deed; and
- Copy of the financing documents.

If the facility has been or will be leased, please provide the following information:

- Whether it is a permanent or temporary site;
- The entity or individual that will be the lessee;
- Whether any party to the lease is a party to this application;
- Whether the development team will need to make leasehold improvements (and if so, explain whether there will be any rent abatement for these improvements);
- Conflicts of interest, if they exist; and
- A copy of the lease.

If the applicant has not identified a facility but are researching properties, please describe the locations the applicant is targeting and the rationale for locating in those neighborhoods. Also include a discussion of the rationale for the space the school will need, and describe in general terms the school's thinking as to what features of the program are required to support the program outlined in the proposal (environmental space, laboratory space, physical education space, etc.). Please also provide a discussion of the amount of funds the school anticipates devoting to facilities, leasehold improvements, etc.

**PLEASE NOTE:** Applicants are encouraged to submit an application for facilities use. Information and application details are available on the CMSD website. Please contact CMSD Chief Operating Officer Patrick Zohn at [Patrick.Zohn@clevelandmetroschools.org](mailto:Patrick.Zohn@clevelandmetroschools.org) for additional details.

## Criteria Section 24 – Facilities

Reviewers will look for a response that:

- Indicates sound management, or in the case of a new school, a sound understanding, of the facilities required to support the school program;
- Reflects an understanding of facilities acquisition costs, leasehold improvement costs, and operating costs;
- Reflects the current or proposed governing authority’s understanding of facilities acquisition challenges; and
- Indicates that the current or proposed governing authority has (or has access to) the expertise and knowledge necessary to secure and maintain a quality facility.

## **Section 25 – Timeline**

**CMSD wants to ensure that proposed new schools have a realistic timeline to move from approval to the first day of school.**

Present a timeline with specific actions the proposed school will take, should it receive a charter, that outlines activities between the date the contract is signed and the proposed first day of school.

The timeline should include:

- An outline of the governance, financial, staffing, and academic program steps required to prepare the school to open; and
- A list of responsibilities for members of the proposed staff and/or governing authority.

**PLEASE NOTE:** To help plan for the first day of school, applicants might want to consider the Opening Assurances checklist provided by the Ohio Department of Education. State law requires that sponsors of community schools provide written opening assurances to the Ohio Department of Education no later than ten business days prior to the first day of school. Please contact Shemekia Love at [Shemekia.Love@clevelandmetroschools.org](mailto:Shemekia.Love@clevelandmetroschools.org) for more information about the Opening Assurances.

### **Criteria Section 25 – Timeline**

Reviewers will look for a response that:

- Indicates a thoughtful approach to the setup of the organizational, financial, and academic steps it takes to ready a school to welcome children;
- Outlines a well-timed plan for student recruitment and enrollment of students; and
- Lists activities scheduled in order to meet the timing required for the CMSD Opening Assurance visit, which must be completed no later than 10 days prior to the opening of school.

# Appendix

*Appendix A*

**Application to CMSD for a Community School  
Transmittal Cover Page**

**1. Type of Application:** *New School, Replication of Existing School Model, or Transfer of Sponsorship*

**2. Name of School:**

**2. Location of the School:** *(Provide an address if available. If not available, please provide the general area of the city for the desired location of the school.)*

**3. Enrollment:**

<b>Contract Year</b>	<b>Grades Served</b>	<b>Total Enrollment</b>
<b>Year 1</b>		
<b>Year 2</b>		
<b>Year 3</b>		
<b>Year 4</b>		
<b>Year 5</b>		

**4. Desired School Opening Date:**

**5. Name of Community Partner and/or Education Service Provider, if Applicable:**

**6. Names of Other Existing Schools in School Model, if Applicable:**

**7. Lead Applicant Contact Information:**

Name:

Mailing Street Address:

City:

State:

Zip:

Home Phone #:

Cell Phone #:

Fax #:

Email Address:

Lead Applicant Public / Media Contact Name:

Lead Applicant Public / Media Contact Number:

**Signature of Lead Applicant:** \_\_\_\_\_ **Date:** \_\_\_\_\_

## *Appendix B*

### **Section 1 – Applicant Information**

- 1. Type of Application:** New School, Replication of Existing School Model, or Transfer of Sponsorship:
- 2. Full Legal Name of Applicant:**
- 3. Lead Applicant Contact Information:**
  - Name:
  - Mailing Street Address:
  - City, State:                      Zip:
  - Home Phone #:
  - Cell Phone #:
  - Email Address:
- 4. Additional Applicant Contact Information:**
  - Name:
  - Mailing Street Address:
  - City, State:                      Zip:
  - Home Phone #:
  - Cell Phone #:
  - Email Address:
- 5. Additional Applicant Contact Information**
  - Name:
  - Mailing Street Address:
  - City, State:                      Zip:
  - Home Phone #:
  - Cell Phone #:
  - Email Address:
- 6. Are all applicant(s) at least 18 years or older (Nor-For-Profit Corporation Law Section 1702):** Yes or No
- 7. On additional sheets, provide background information for each applicant.**

Include whether he or she is a teacher, parent, school administrator, and/or community resident, and if he or she would be a member of the community school's governing authority. Required background information includes, at a minimum, the applicant's educational and employment history; curriculum vitae or resumes are preferred.

## Appendix C

### Directions for Section 8: Performance Rationale for Replication

Please create an Existing School Data Workbook in Excel or a similar program using the following categories as headers for columns. Complete for each school in the charter school network, using one school per row. CMSD will send applicants this Workbook if requested. Please contact Stephanie Klupinski at [Stephanie.Klupinski@clevelandmetroschools.org](mailto:Stephanie.Klupinski@clevelandmetroschools.org) or call 216-838-0179.

Column A: School Name  
Column B: Year Opened  
Column C: CMO  
Column D: School Model  
Column E: Attendance Rate 2013-14  
Column F: Attendance Rate 2014-15  
Column G: Attendance Rate 2015-16  
Column H: Attendance Rate 2016-17  
Column I: October 1 Enrollment 2013-14  
Column J: October 1 Enrollment 2014-15  
Column K: October 1 Enrollment 2015-16  
Column L: October 1 Enrollment 2016-17  
Column M: May 1 Enrollment 2013-14  
Column N: May 1 Enrollment 2014-15  
Column O: May 1 Enrollment 2015-16  
Column P: May 1 Enrollment 2016-17  
Column Q: Growth on One-Year Value Add 2014-15  
Column R: Growth on One-Year Value Add 2015-16  
Column S: Growth on One-Year Value Add 2016-17  
Column T: Growth on Three-Year Value Add 2014-15  
Column U: Growth on Three-Year Value Add 2015-16  
Column V: Growth on Three-Year Value Add 2016-17  
Column W: Performance Index 2014-15  
Column X: Performance Index 2015-16  
Column Y: Performance Index 2016-17  
Column Z: Third Grade Reading Proficiency 2014-15  
Column AA: Third Grade Reading Proficiency 2015-16  
Column AB: Third Grade Reading Proficiency 2016-17  
Column AC: High School Graduation Rate 2014-15  
Column AD: High School Graduation Rate 2015-16  
Column AE: High School Graduation Rate 2016-17



## Appendix D

### Section 19a – Parent and Community Engagement – New Schools

1. Address of Proposed School:
2. Neighborhood name where school is proposed:
3. Council Member and Ward where school is proposed:
4. Provide a list of community partners proposed school may have developed and describe their roles in contributing to the school and the students' success. Include letters of support or other information.
5. If you met with a Cleveland City Council member, please provide the date of the meeting:
6. Did the Cleveland City Council Member provide a support letter? *(Yes or No – Please attach)*
7. If you met with the Community Development Corporation, please provide the date of the meeting:
8. Did the Community Development Corporation provide a support letter? *(Yes or No – Please attach)*
9. Date of Community Meeting(s):
10. Name of civic association(s), if any, that hosted Community Meeting(s):
11. Attach copies of any marketing materials that were used to promote attendance at the Community Meeting, along with an explanation of how the materials were used.
12. Attach a copy of the presentation materials from the Community Meeting.
13. Attach a narrative that summarizes community comments from the Community Meeting(s) and how the proposed school intends to address any hopes, issues, or questions raised.
14. Attach a list of families committed to, or strongly interested in, attending the proposed school including zip code and current grade.
15. Attach a narrative that indicates how the school will continue, after it opens, to engage parents and the community in supporting the school's academic and overall success.

## Appendix E

### Section 20 – Request for Information from Community School Governing Authority Member

Charter school sponsors have a legal responsibility to ensure that community school governing authority members comply with state law including but not limited to background, conflicts of interest, and eligibility and ensure transparency and efficacy. Annual disclosure is required in accordance with state law. For purposes of this disclosure, as defined in R.C. 3314.02, "immediate relatives" are limited to spouses, children, parents, grandparents, siblings, as well as in-laws residing in the same household as the person serving on the governing authority.

State law (3314.037) also requires governing authority members to complete annual training on public records and open meetings laws.

Each trustee should complete this form once each school year. It must then be uploaded to Epicenter. Your board may have its own Epicenter access; if not, then your head of operations must submit it on your behalf.

Community School Name:	
School Year:	
Your Name:	
Your Address:	
Your Employer:	
Your Title:	
Address of Employer:	
Preferred Phone:	
Preferred Email Address:	
Are you at least 18 years old?	<input type="checkbox"/> I affirm that I am at least 18 years old.
Date of most recent criminal records check as prescribed by R.C. 3319.39 (BCI/FBI). If not yet completed, please indicate that in writing.	
Date Disclosure Completed:	

Please respond to each question, providing additional detail or commentary as required below each question.

1. Have you provided a resume, bio, or curriculum vitae?  YES  NO
2. Do you owe the state any money or are you in a dispute over whether you owe the state any money concerning the operation of a community school that has closed?  YES  NO
3. Have you ever been refused, limited, or been subject to the revocation of a license to teach?  YES  NO
4. Have you ever pleaded guilty to or been convicted of theft in office under section [2921.41](#) of the Revised Code, or have you pleaded guilty to or been convicted of a substantially similar offense in another state?  YES  NO
5. Have you ever been the subject of a finding for recovery by the auditor of state?  YES  NO
6. Do you currently serve as a governing authority member of any other community schools? If yes, please list all other schools. Note that Ohio law prohibits individuals from serving on the governing authority of more than five start-up community schools (See R.C. 3314.02).  YES  NO
7. If yes, to question 6, are you compensated for your role as a governing authority member by any charter school? If yes, please list each school and the associated compensation.  YES  NO
8. If the school contracts with an operator (as defined by R.C. 3314.02 (A) (8); please note that this definition also appears in the Appendix), please indicate whether you or an immediate family member have a direct or indirect ownership, employment, contractual, or management interest in the provider. For any interest indicated, please provide a detailed description.  YES  NO
9. Are you or have you or any immediate relative been an owner, employee, or consultant of any department, division, or section of the sponsoring district that is directly responsible for sponsoring community schools, or have supervisory authority over such a department, division, or section, within the last 12 months of the date of this disclosure?  YES  NO

10. If the school is partnered with an operator (as defined by R.C. 3314.02 (A) (8)), please indicate if you or an immediate family member are conducting any business with the provider. If so, please indicate the precise nature of the business that is being conducted.  YES  NO

11. Have you or any of your immediate relatives or business associates been employed by any of the following within the previous three years:  YES  NO

- (a) The sponsor or operator of the community school;
- (b) A school district or educational service center that has contracted with the community school;
- (c) A vendor that is or has engaged in business with the community school.

If yes, please provide a list of names and employment dates.

12. Do you currently serve as a member of a school district board of education?  YES  NO

13. Have you read and do you understand the community school's conflict of interest policy?  YES  NO

14. Did you attend or do you commit to attend public records and open meetings training this school year and every school year for which you serve as a governing authority member of the community school?  YES  NO

15. Please indicate any potential ethical or legal conflicts of interest that exist based on you service on this community school's board. Please note that being a parent of a school student, serving on another community school's board, or being employed by the school are conflicts that should be disclosed, but do not make you automatically ineligible to serve as a trustee. If none exist, please state that.

16. Please provide any other information that you feel pertinent to the District's review.

***Certification***

*I, \_\_\_\_\_, certify to the best of my knowledge and ability that the information I am providing in regards to my application to serve as a member of the governing authority of the \_\_\_\_\_ Community School is true and correct in every respect.*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

## *Appendix F*

### **Section 21 – Budgets and Budget Narratives, Budget Templates**

Note: Applicants can download a copy of the Excel sheet found here at <http://www.clevelandmetroschools.org/Page/6133>.











**Thank you for your interest in applying for sponsorship  
with the Cleveland Metropolitan School District.**

**This marks the end of the application.**