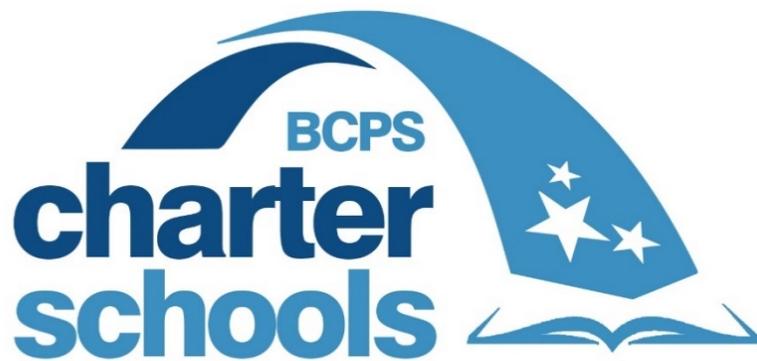


# **Baltimore County Public Schools Public Charter Schools**



## **Charter School Application Procedures**

### **PROGRAM CONTACT**

Baltimore County Public Schools  
Department of Educational Options  
Attn: Charter School Liaison  
105 W. Chesapeake Ave.  
Towson, Maryland 21204  
443-809-3033

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## INTRODUCTION

### **The Maryland Public Charter Program**

In 2003, the Maryland Public Charter School Act was enacted to establish the public charter school program. With the enactment of the law, Maryland joined a growing number of states that encourage the development and operation of public charter schools.

Maryland's law defines a "public charter school" as a "public school" that is nonsectarian in all of its programs, policies and operations; is a school to which parents choose to send their children; is open to all student on a space-available basis; and admits students on a lottery basis if more students apply than can be accommodated. A public charter school can be either a newly created school or a conversion of an existing public school. A public charter school operates with the approval of a local board of education in accordance with a written charter executed between the local board of education and the administrative entity operating the public charter school. Just as any other public school, a public charter school is subject to federal, state and local laws prohibiting discrimination and must comply with all applicable health and safety laws.

The Maryland Public Charter School law is codified in the *Annotated Code of Maryland*, Education Article, Title 9, *Maryland Public Charter School Program*.

The Maryland State Department of Education's experience has shown that successful public charter schools tend to have a number of common characteristics:

1. A clear, focused, results-oriented mission statement that aligns all parts of the proposal and is furthered by specific, strategic and measurable goas and objectives;
2. Demonstrated understanding of the populations that the school is likely to serve;
3. An educational program with research-based components that have proven to be effective for the target population to be served;
4. Strong and diverse leadership and governance; and
5. Strong financial planning and management.

Public charter schools are secular, tuition-free public schools that operate as independent nonprofit organizations. Historically, there have been two key principles that guide public charter schools. The first is that they are provided an opportunity to operate autonomously in exchange for school innovation; and second, that they are held accountable for student achievement and school performance as a condition of their charter.

Public charter schools are public schools that are granted a specific amount of autonomy, determined by State law and the specific charter, to make decisions concerning the organizational structure, curriculum and educational emphasis of the school. Public charter schools are granted waivers from certain regulations (including school system policies and processes) that typically bind public schools.

In return for this additional autonomy, public charter schools are held accountable for:

1. Meeting or exceeding State and BCPS academic achievement targets;
2. Success in meeting the performance goals set in the Charter Agreement;
3. Responsibility in the use of public funds; and
4. Compliance with all applicable laws and regulations not waived for public charter schools.

### **Chartering Authority and Eligibility in Maryland**

A "charter" is a formal agreement or contract entered into by a chartering authority and statutorily authorized applicant. This guidance document provides assistance to those interested in sponsoring a public charter school. Baltimore County Public Schools (BCPS) will help applicants understand the application process, consult with applicants concerning all requirements and provide guidance throughout the application process. The Board of Education of Baltimore County (Board) is the chartering authority and is responsible for final approval of all applications.

As a public charter school authorizer, the Board invites proposals to establish public charter schools that are likely to achieve strong educational outcomes beyond what is currently offered in BCPS.

This application packet will guide applicants through the steps of developing a public charter school proposal. Each step requests information about specific aspects of the proposed plan and presents the evaluation criteria that reviewers will use to determine whether the section meets the standard for approval.

***If you have any questions regarding this application or evaluation process, please contact:***

Baltimore County Public Schools  
Department of Educational Options  
Attn: Charter School Liaison  
105 W. Chesapeake Avenue  
Towson, Maryland 21204  
443-809-3033

## REQUIREMENTS

### Baltimore County Public Schools Charter School Application Requirements

#### **The Compass: Our Pathway to Excellence**

BCPS is dedicated to providing a quality, comprehensive educational program designed to address the needs of a diverse student population. The Compass: our pathway to excellence is a strategic plan which serves as the framework for BCPS and sets forth five goals and specific strategic initiatives for each goal. These goals and indicators are the concrete, measurable statements of the expectations for all students in BCPS and are the standards to which all schools, including public charter schools, are held. The Strategic plan is built around the following goals:

- Goal One: Learning, Accountability, and Results
- Teaching and Learning Framework
  - New Curricula in ELA and Mathematics
  - Academic Programs and supports for GT, ESOL, and Special Education
  - Disciplinary Literacy
  - Service and support model for schools
- Goal Two: Safe and Supportive Environment
- Student and staff supports
  - Positive school and workplace climate
  - Safe and secure environments for learning and working
  - Emergency preparedness
- Goal Three: High Performing Workforce and Alignment of Human Capital
- Recruitment source and partnerships
  - Teacher retention and reduction of vacancies
  - Teacher absence
  - Grow our own
- Goal Four: Community Engagement and Partnerships
- Family engagement and outreach
  - Community Partnerships
  - Parent and guardian satisfaction
  - Multilingual Outreach
- Goal Five: Operational Excellence
- Financial Resource Management
  - Network Capacity Upgrade
  - Improve School Facilities Systemwide
  - Implementation of BCPS Sustainability Plan
  - Maintain schools in a state of good repair
  - Transportation, Staffing and Training

### **Special Education Requirements**

Public charter Schools are public schools and, as such, are required to comply with federal and state special education laws and regulations. A local board of education shall ensure that the authorizing process for a public charter school and the application addresses the roles and responsibilities of the local school system and the operators of the public charter school consistent with federal and state laws and regulations, including, but not limited to: *Individuals with Disabilities Education Act* (IDEA) 20 U.S.C. § 1400, *et seq.*, as amended; *Americans with Disabilities Act*, 42 U.S.C. 12101, *et seq.*, as amended; 34 CFR 300, *Section 504 of the Rehabilitation Act of 1973*, 29 U.S.C. § 794 (Section 504), as amended; *Annotated Code of Maryland*, Education Article, Title 8, Subtitle 4, *Children With Disabilities*; *Code of Maryland Regulations* (COMAR) 13A.05.01, *Provision of a Free Appropriate Public Education*; and COMAR 13A.05.02, *Administration of Services for Students with Disabilities*.

The State Board of Education will provide technical assistance to the operators of a public charter school to help the school meet requirements of federal and state laws and regulations.

Note: As required by the Maryland Public Charter School Act, the Board of Education of Baltimore County will not grant a charter to a public school whose operation would be inconsistent with any public policy initiative, court order or federal improvement plan governing the provision of special education and related services.

### **Requirements for English Learners (ELS)**

Public charter schools are public schools and are required to comply with federal and state laws and regulations pertaining to programs for students who are English Learners (ELS) as identified based on the home language survey. A local board of education shall ensure that the authorizing process for a public charter school and the application addresses the roles and responsibilities of the local school system and the operators of the public charter school consistent with federal and state laws and regulations, included, but not limited to: Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d, *et seq.*; the Equal Education Opportunities Act of 1974, 20 U.S.C. 1701, *et seq.*; and the *Code of Maryland Regulations* (COMAR) 13A.05.07, *Programs for English Learners*.

The State Board of Education will provide technical assistance to the operators of a public charter school to help the school meet requirements of federal and state laws.

### **Maryland State Requirements**

The State of Maryland determines requirements for enrollment, attendance, discipline high school graduation, and student records maintenance. MSDE requires annual reporting of student data from all local education systems. The public charter school, as part of the school system, will be expected to use BCPS reporting systems and comply with and participate in all reporting requirements as required by the following: Maryland Student Records Manual, MSDE department reports and all other MSDE reports, as required.

The public charter school operates under the authority of the Board of Education of Baltimore County (Board). Except as provided in § 9-104 of the Education Article, the public charter school must abide by the Board policies, Superintendent's Rules and established procedures of the school

system. The [Board's policies and Superintendent's rules](#) may be accessed on the school system's Web site.

The Board of Education's Public Charter School policy is outlined in [Policy 1600](#) and [Superintendent's Rule 1600](#), *Public Charter Schools*.

The public charter school applicant should also familiarize itself with existing negotiated agreements for school system employees. The Board's negotiated [Master Agreements](#) and supplements, if applicable, may be accessed on the school system's Web site.

## **PUBLIC CHARTER SCHOOL APPLICATION PROCESS**

### **Step 1: Submission of a Letter of Intent**

All applicants seeking to establish an authorized public charter school must submit a letter of intent by the due date specified. Potential applicants who do not submit a complete letter of intent by the deadline will not be permitted to submit a full application.

This Letter of Intent is the first step in the public charter school application process. Persons interested in operating a public charter school shall first submit a Letter of Intent for the proposed public charter school. An approved Letter of Intent is required in order to submit an application for a public charter school in Baltimore County.

The purpose of a quality public charter school in Baltimore County is to establish an alternative means within the existing school system for innovative learning opportunities and creative educational approaches to improve the education of students. Providing a pre-application Letter of Intent gives the applicant an opportunity to informally share information and receive feedback from the school system. This is also an opportunity for the applicant to describe the education program goals and objectives, as well as the vision, mission, and focus of the school. By completing the Letter of Intent, the applicant acknowledges and accepts the requirements and expectations therein.

The submission of a Letter of Intent implies no further obligation on either party. The filing of a Letter of Intent may not be used by the applicant for promotion or advertising.

### **Required Criteria and Forms**

In order for the school system to respond meaningfully, the following components must be included with the Letter of Intent submission:

- A. Letter of Intent (Sample provided in Appendix A)
  1. The Letter of Intent shall include:
    - a. A brief explanation of the mission
    - b. The proposed location of the public charter school
    - c. The name of the organizing group and primary contact person
  2. Appendix A is provided as a resource in submitting the Letter of Intent.
- B. Contact Information (Complete and submit Appendix A1)

1. Contact information: Applicant(s) information including mailing address, phone number, and e-mail address, and information establishing that the applicant(s) is a parent, teacher, school administrator or community resident.
2. Media contact: Please provide a phone number and/or e-mail address to which public inquiries about the proposed public charter school may be addressed.
3. Founding board members: The names of each member of the applicant founding group, including all applicants, along with a very brief description of relevant experience and skills. Please identify the current or prospective role that each member has or will hold in relation to the proposed public charter school.
4. Application history: If you or another member of the current or a previous founding group has ever applied to this or another charter entity to open this proposed school or another public charter school, please indicate the date the application(s) was/were submitted and to which charter entity, and briefly describe the outcome of the charter entity's decision.
5. Tax status of the organization.

**Note:** The submitted Letter of Intent (and all other public charter school application material) will become public record once this information has been submitted to the school system. Personal contact information will be redacted from the document, but all other information will become public.

- C. Prospectus (See, Appendix A2 for guidelines and format requirements)  
 The Prospectus should be a five to ten-page summary of the charter proposal consisting of:
1. The name and the location of the proposed public charter school. (The name of the school must include the words "Public Charter School" in the title.
  2. The applicant's mission statement and identified focus of the school. The primary mission must remain focused on student achievement.
  3. The applicant's vision for what the school intends to do, for whom and to what degree.
  4. Specific plans and strategies for developing and delivering educational programs, including the proposed educational program's goals and objectives and the applicant's plan for meeting the proposed goals.
    - a. How the public charter school would improve the academic performance of BCPS.
    - b. How the public charter school would enhance the curricular and instructional programs of BCPS.
    - c. How the public charter school would address improved student performance on accountability measures.
  5. Specific educational results, including student academic outcomes and how they will be measured.
  6. Student recruitment and admission procedures, including population to be served (geographic area; grade levels; number of students initially, when at full capacity; number of students currently BCPS students; etc.)

7. A brief description of the business plan, including financial management capabilities, potential partners, access to financial resources and legal accountability for the operation of the public charter school.
8. A description of the founding team's capacity to implement the educational plan and business plan.
9. General governance structure, including leadership information for the applicant's authorized school leader(s) and governing board members.

D. Pre-Operational Budget (Complete and submit Appendix A3)

The public charter school is likely to incur considerable costs before it receives its first distribution. The pre-operational budget is used to verify fiscal support for the proposed public charter school.

### **Deadline**

Letter of Intent, Contact Information (Appendix A1), Prospectus (Appendix A2) and Pre-Operational Budget (Appendix A3) shall be **submitted<sup>1</sup> to the Charter School Liaison on or before May 1 two years preceding the proposed starting date of the public charter school. Proof of date of mailing is required.** (e.g., for a school to open in school year 2023-2024, the Letter of Intent shall be submitted and received **by no later than May 1, 2021**).

### **Submit the Letter of Intent and Requisite Forms to:**

Baltimore County Public Schools  
Department of Educational Options  
Attn: Charter School Liaison  
105 W. Chesapeake Avenue  
Towson, Maryland 21204

### **Review/Approval**

The Charter School Liaison will review the Letter of Intent and notify the applicant in writing whether the information submitted is sufficient to support the development of a formal application and that the application process may proceed.

Applications will only be accepted from applicants who have received written approval of the Letter of Intent.

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<sup>1</sup> Submitted means received by the Office of the Charter School Liaison. The documents will be deemed to have been timely submitted if they have been: (1) delivered to the Office of the Charter School Liaison on or before the documents are due; (2) deposited in the United States mail as registered, certified, express, or priority mail or deposited with a delivery service such as federal express, UPS or DHL, that provides verifiable tracking of the item from the point of origin before the documents are due.

### **Application Timeline**

- Applicant notifies BCPS of interest in creating a public charter school by submitting a **Letter of Intent (Appendix A), Contact Information (Appendix A1), Prospectus (Appendix A2) and Pre-Operational Budget (Appendix A3) on or before May 1**.

The Charter School Liaison will review the Letter of Intent and notify the applicant in writing whether the information is sufficient to support the development of a formal application. If the Letter of Intent is approved, the applicant may submit an application.

- Applicant submits **completed application and documents** to BCPS, on or before the first business day after January 1.

**Is the application complete?** BCPS staff reviews application for technical completion within 30 calendar days.

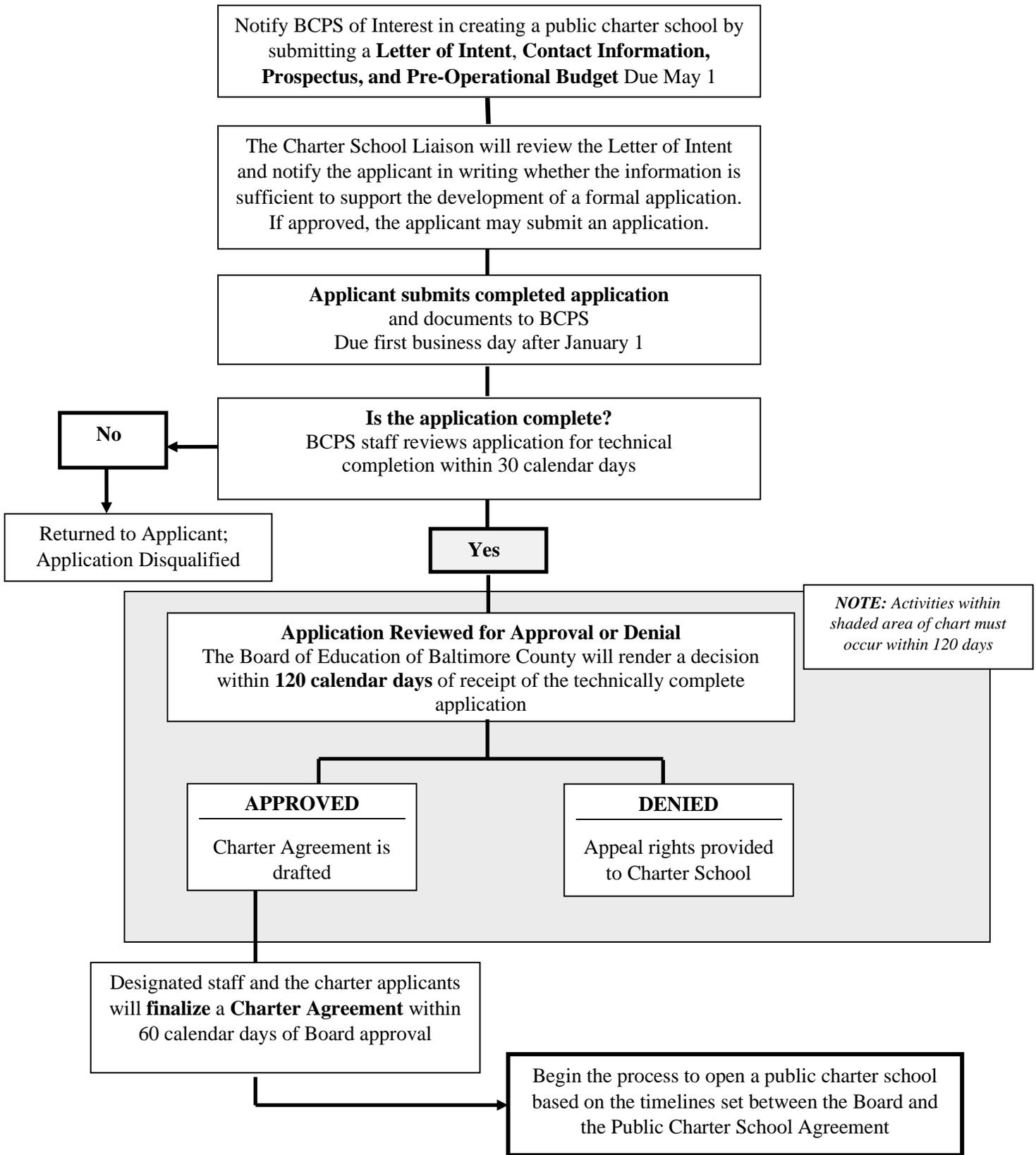
**If the application is Not complete**, the application is disqualified and returned to the applicant.

**If the application Is complete**, the Board of Education of Baltimore County will render a decision, approved or denied, within 120 calendar days of receipt of the technically complete application.

**If the application is Denied by the Board of Education**, appeal rights will be provided to the Public charter school.

**If the application is Approved by the Board of Education**, a charter agreement will be drafted. Designated staff and the charter applicants will finalize a **Charter Agreement** within 60 calendar days of approval. The process to open a public charter school will begin based on the timelines set between the Board and the Public Charter School Agreement.

## Application Timeline Flow Chart



## **Step 2: The Application Development Process**

The next step is the application development and submission process. The application development and submission process provide opportunities for the prospective public charter school organizing body to thoroughly describe all aspects of the proposed educational program and to clearly delineate various administrative functions that will need to be fulfilled during the planning, opening, and operation of the public charter school. The application development process culminates in the submission of a completed application to the local board of education for its review and subsequent approval or denial.

### **Application Format Requirements**

The application should adhere to the following format:

- Hard copy on white, 8.5" x 11" paper
- One-inch margins on all sides
- No font smaller than 11-point font
- Paragraph formatting may not be more compact than standard single space
- Spiral-bound or 3-ring binders (no paper clips or folders)

There is no minimum length for an application. There is a maximum of 150 pages for the application response including attachments.

### **Application Deadline and Submission Requirements**

The application package should include the following:

- One clearly labeled, unbound original copy
- Sixteen spiral-bound or 3-ring binders (no paper clips or folders)
- An electronic version of the application made available to the Charter Liaison

The application and requisite forms shall be **submitted<sup>2</sup> to the Charter School Liaison on or before the first business day after January 1, one year preceding the proposed starting date of the public charter school. Proof of date of mailing is required.** (e.g., for a school to open in school year 2023-2024, the application shall be submitted by January 3, 2022.)

### **Submit the Application and Requisite Forms to:**

Baltimore County Public Schools  
Department of Educational Options  
Attn: Charter School Liaison  
105 W. Chesapeake Avenue  
Towson, Maryland 21204

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<sup>2</sup> Submitted means received by the Office of the Charter School Liaison. The documents will be deemed to have been timely submitted if they have been: (1) delivered to the Office of the Charter School Liaison on or before the documents are due; (2) deposited in the United States mail as registered, certified, express, or priority mail or deposited with a delivery service such as federal express, UPS or DHL, that provides verifiable tracking of the item from the point of origin before the documents are due.

## **PART A: OVERVIEW**

### **A1. Executive Summary**

The executive summary should be an overall summary of the proposed public charter school's purpose, mission and goals. It should give school system officials a broad idea of your vision for the school and be focused enough to describe the specific mission that would make this school unique.

The public charter school's mission statement should be clear, concise and articulate the school's central purpose and goals. It should state the school's reason for existence and communicate the school's uniqueness. The mission will guide your school's instructional and non-instructional program.

Public charter schools must provide as much instruction time during a school year as required by other public schools.

**Note:** Section 7-103 of the Education Article states that each public school under the jurisdiction of a county board shall be open for public attendance for at least 180 actual school days and minimum of 1,080 hours for elementary and middle schools or 1,170 hours for high schools during a 10-month period in each school year. Schools may not be open on Saturdays, Sundays or holidays in order to meet the 180 day or 1,080-hour requirement. Schools must remain open 3 hours in order to meet the full day requirement under State law.

Public charter schools must comply with the following State mandated public school holidays:

- Labor Day;
- Thanksgiving Day and the Friday after Thanksgiving;
- Christmas Eve through New Year's Day;
- Martin Luther King, Jr. Day;
- President's Day;
- The Friday before Easter and from then through the Monday after Easter;
- Memorial Day;
- Primary and General Election Days

### **A2. Profile of Founding Group**

Describe the composition of the group or partnership that is working together to apply for a charter, which demonstrates a track record of success in developing a program which will assist students in meeting rigorous academic standards.

### **A3. Background Information**

Please provide the following information on the Founding Group members currently involved with the development of the public charter school, the authorized agent, principal and any individuals responsible for the day-to-day operation of the school. A resume for each individual is also required.

- References
- Employment History
- Education History

- Statement of Intent
- Affidavit, disclosure and consent for background and credit check (See Appendix G)

**Note:** The information and resume provided will be subject to verification by the Board of Education.

## **PART B: EDUCATIONAL PLAN**

The theory behind a public charter school is that the public charter school programs will provide educational options to students that are not available within the traditional public school system. The educational plan is a clearly articulated vision for an innovative public school, which will lead to improved educational outcomes and greater community ownership of the local school.

The educational plan should define what students will achieve; how they will achieve it; and how the school will evaluate performance. It should provide a clear picture of what a student who attends the school will experience with respect to educational climate, structure, assessment and outcomes. The educational plan should address each of the following:

### **B1. Educational Design and Student Information**

#### **Background Information for Consideration**

The educational design is made up of those elements in the proposed school that will be implemented to create programs, systems and processes to ensure that the school's mission and vision are accomplished successfully. Elements of a school design must address: alignment of goals and objectives to the school; school size; special programs that will be offered; how professional development will be designed; instructional frameworks; the use and infusion of technology; the use of partnerships; performance, promotion, and graduation standards; and how resources (time, space and human capital) will be allocated.

#### **Application Description**

- Describe the proposed public charter school's educational design. The educational design is made up of those elements in the proposed school that will be implemented to create programs, systems and processes to ensure that the school's mission and vision are accomplished successfully.
  - Elements of a school design must address: alignment of goals and objectives to the school; school size; special programs that will be offered; how professional development will be designed; instructional frameworks; the use and infusion of technology; the use of partnerships; performance, promotion and graduation standards; and how resources (time, space and human capital) will be allocated.

### **B2. Curriculum and Instruction**

#### **Background Information for Consideration**

In 2013-2014, schools across the state implemented Maryland's college and career-ready standards. These standards incorporate the common core state standards. Maryland was one of

the first states to adopt the standards in English language arts/Literacy and mathematics. The Maryland State Board of Education adopted the standards by unanimous vote in June 2010.

For more information, visit the MSDE Web site:

<https://www.marylandpublicschools.org/programs/Pages/MD-CCRS/index.aspx>

### Application Description

- Provide a substantive overview of the curriculum including how the public charter school will maintain consistency between the mission, curriculum, and student population to be served.
- Discuss the specific instructional strategies/methods that will be relevant or necessary to successful implementation of the curriculum.
- Discuss how curriculum and instruction needs are reflected in plans for professional development.
- Describe the process and procedures used to evaluate whether the curriculum is effective and successfully implemented.
- Explain how the school will ensure that teachers are proficient in delivering the chosen instructional methods.
- Describe strategies for differentiating instruction for above, average, and low performing students.
- Describe and present the rationale for instructional materials to be adopted.
- For secondary programs, describe how the courses and curricula will prepare students for career-ready and college-level work.
- For virtual learning opportunities, describe the following, if applicable:
  - Courses and/or programs to be offered online and offline.
  - Describe the teachers' roles and how they will differ from traditional roles with online courses.
  - The technology, including types of hardware, software, equipment, and other materials the school will provide and the plan for providing and handling materials.
  - Plan for technical support and troubleshooting for students, teachers, administrators, and parents.
  - Back-up plan for delivering instruction in case of technical or other delivery problems that may arise.

### **B3. Special Student Populations**

#### Background Information for Consideration

All public charter schools in Maryland are public schools that enroll students through a lottery process. Therefore, all public charter schools must be prepared to enroll students with diverse learning needs including limited English Language Learners and students with special needs, all of whom must be provided with full and meaningful access to the general educational curriculum.

The general education classes need to have an environment which is responsive to the educational needs of all children, and accommodates students' needs to the maximum extent appropriate. A continuum of services must also be available through the school so that all students can participate fully in the educational goals and mission of the school as described in its charter.

#### Application Description

- Describe the public charter school's ability to maintain compliance with applicable regulations to meet the needs of English learners and students with special needs in the school program.

### **B4. Student Recruitment, Admission and Enrollment**

#### Background Information for Consideration

As required by law, admissions preference is granted to students who are eligible to attend BCPS. Enrolled students should be guaranteed admission the following year provided the appropriate grade is available.

#### Application Description

- Outline the procedures developed to determine eligibility for students in accord with the above.
  - Application forms should request at a minimum: the student's name; date of birth; grade level; address; names, addresses and telephone numbers of parents/guardians; names of siblings also applying; and a signature verifying that the information is correct and that the parents/guardians are choosing education at the public charter school for their child.
  - Application forms cannot contain any information regarding previous grade reports, IEPs, English language proficiency, FARMS, previous school, health, discipline, attendance, etc.

### **B5. Code of Student Conduct**

#### Background Information for Consideration

It is expected that discipline procedures will be aligned with those outlined in Policy 5500, Code of Student Conduct; Policy 5550, Student Behavior Code; and Policy 5560, Suspensions and Expulsions, unless modified in the Charter Agreement.

#### Application Description

- Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social emotional development.
- Explain the school's student behavior philosophy for both the general student population and for students with special needs.
- State whether the proposed school intends to use Baltimore County Public Schools' *Student Handbook*. If the proposed school does not intend to use the *Student Handbook*, describe in detail the proposed school's approach to student discipline. If already developed, provide the proposed discipline policy or student code of conduct as an attachment. Discipline policies and procedures related to students identified with disabilities and under Section 504 of the Rehabilitation Act must be in accordance with federal, state and local regulations. Refer to the MSDE Web site of the special education and early intervention division for publications on the discipline of students with disabilities: [HTTP:MARYLANDPUBLICSCHOOLS.ORG/MSDE/DIVISIONS/EARLYINTERV/SPECIAL\\_ED\\_INFO](http://MARYLANDPUBLICSCHOOLS.ORG/MSDE/DIVISIONS/EARLYINTERV/SPECIAL_ED_INFO)

- Describe the strategies the proposed school will employ to develop and sustain a safe and orderly school climate that supports fulfillment of the educational goals.
- Explain the practices the school will use to promote schoolwide positive behavior, including both incentives for positive behavior and penalties for infractions.
- Describe procedures for due process when a student is suspended or recommended to BCPS for expulsion as a result of a violation, including a description of the appeals process that the school will employ for students facing recommended expulsion and a plan for providing services to students who are out of school for more than ten days.
- Explain the process for informing students and parents about their rights and responsibilities under the code of conduct.

## **B6. Student Health and Safety**

### **Background Information for Consideration**

School officials have a duty to examine the potential risks and have plans in place to prepare for such situations as fires, earthquakes, tornadoes, snow and ice storms, weapons or drugs in schools, civil disruptions, criminal assaults and batteries, bomb threats, trespassers on campus, serious illnesses and injuries. These plans should address minimally: building evacuation, lockdown, lockout, or shelter in place plans; communication protocols, both internal to the school system and external to police and fire departments, parents, and the community at large; and follow-up services such as student counseling.

An emergency is an unplanned event. It does not follow, however, that school officials have no responsibility for planning for emergencies. The numerous statutory references related to emergency plans, conduct codes, school safety and student violence demonstrates a heightened awareness of the need to plan for emergencies, so that school personnel can implement the plan immediately. Failure to do what reasonable persons would do created the risk of negligence claims and resultant legal liability.

After the creation of a plan, key components of the plan should be communicated and practiced through drills so that all staff and students know exactly what to do. If an emergency occurs, the plan itself must be rigorously examined for effectiveness and modified to prepare for the next emergency.

Students come to school with medical and health needs, some of which are simple, and some are chronic. All these issues implicate the importance of the provision of school health services in public schools.

### **Application Description**

- Describe how you will prepare a student health and school safety plan. List the elements that will be part of your plan and why these components are important to include in your plan.
- Explain how you will ensure that you are following federal, state and local regulations.

## **B7. School Calendar and Daily Schedule**

### **Background Information for Consideration**

Public schools under the jurisdiction of a county board shall be open for pupil attendance for at least 180 actual school days and a minimum of 1,080 school hours for Grades 1-8 and 1,170 for Grades 9-12 during a 10-month period in each school year. Schools may not be open on Saturdays, Sundays or public school holidays in order to meet the 180 day or 1,080 hour requirement. Schools must remain open 3 hours during each school day in order to meet the full-day requirement under State Law. More information on the school calendar can be found in *Section 7-103, Education Article, Annotated Code of Maryland*.

### **Application Description**

- Describe the school's daily schedule and annual calendar, including the annual number of days and hours of instruction time.

## **B8. Assessment**

### **Background Information for Consideration**

Student assessment is an essential component of the public charter school's educational plan. Assessment confirms student progress, identifies areas of low and high achievement and improves the accountability of the school. An integrated assessment system uses the Maryland College and Career Readiness Standards as a foundation and serves as a structure for how teachers and administrators will measure what students know and are able to do as a result of the delivery of curriculum and instruction.

Components of the assessment system can also be used to establish and monitor goals in the school's required Accountability Plan. Information from assessments serves to help determine what areas of instruction need additional time, the needs of individual students, the quality of instruction, decisions on improvement strategies, and the school's overall progress in meeting accountability plan goals. While choosing which data to collect and setting up the systems to track data in a reliable and consistent manner can be a challenging and time intensive activity, it can also be a truly valuable one. Ultimately, the assessment system provides information to all stakeholders on whether the school is an academic success.

### **Application Description**

- Describe the school's approach to an assessment system. The proposed system should reflect how the school would link curriculum and instruction to assessment by measuring the academic progress of individual students, cohorts of students over time and students in school as a whole, with the goal of continual school improvement.
- In responding to this section, consider the following:
  - How will the school use student assessment data to drive key decisions aimed at the evaluation, retention and support of the teaching staff, aligned with the state's approach to incorporating status and growth data?
  - Consider how the plan will use disaggregating data to ensure growth and achievement of all student groups including by race and by services received (IEP, EL, etc.)

## **B9. Family Involvement**

### **Background Information for Consideration**

One of the most distinctive aspects of public charter schools is that they are choice schools. This means that parents submit applications for these schools and students are selected by lottery.

The application should demonstrate the expectations and plans for ongoing family involvement and the support of volunteers through volunteer networks.

### **Application Description**

- Describe how the school plans to build and maintain family-school partnerships that focus on strengthening support for student learning, improving communication, and encouraging parental involvement in school operations.
- Explain how you will work with parents and provide the information and training that enables them to support their children’s involvement.
- Explain how parents will be involved in the governance of the public charter school.
- Identify methods for handling disputes between parents and the school.
- Describe how parental satisfaction will be obtained and the process for gathering and publicizing parental satisfaction results.

## **B 10. Waivers for Educational Plan** (Refer to Appendix H)

### **Background Information for Consideration**

Public charter schools may request to waive certain state laws or school district policies in order to operate differently or be exempt from certain requirements. These exemptions, however, must be accompanied by plans that detail why the exemption is necessary, how the public charter school will remain accountable, and what the expected outcomes will be. The documentation of a plan is called a “Waiver Request”, or simply a “waiver”. In other words, a waiver request is the documentation for a public charter school to carry out a state law or school district policy differently.

Typically, a new public charter school application includes a waiver request for state law and school system policies, procedures, and collective bargaining agreements. For each statute or policy waiver the public charter school is requesting, there is a rationale, replacement plan, expected outcome and a description of how the replacement plan will be evaluated. It is common for the public charter school’s authorizer to review the policy the public charter school plans to use in lieu of the statute or policy.

Waivers are the legal means in Maryland by which a public charter school obtains the flexibilities and autonomies to operate to accomplish their educational design. Sometimes public charter schools request waivers from state laws that they will abide by, but in a different manner. For example, the public charter school governing board will set the annual school calendar rather than the school system board.

Review key documents such as: the state Maryland Charter School law, the Code of Maryland Regulations (COMAR), the school system’s collective bargaining contracts, Board policies and Superintendent’s rules to determine if there are rules that might provide an impediment to accomplishing your mission, vision or to implement your program design.

Examples of possible waivers could be: length of the calendar year, contract rules for personnel such as – involuntary transfer of staff, salary requirements, etc. Local school system policies and practices might require that all schools use designated curricula, require the principal attend school system principal meetings, or require the public charter school participate in school system initiatives, etc. These are examples of waivers that local school systems can provide.

The Code of Maryland Regulations may be accessed on the Web site for the Maryland Office of Secretary of State: [HTTP://WWW.DSD.STATE.MD.US/COMAR/COMARHOME.HTML](http://www.dsd.state.md.us/comar/comarhome.html)

For more information on filing waivers with the Maryland State Board of Education see COMAR 13A.01.01.03. Be sure to also review the Maryland Charter School law included in Appendix D for rules that cannot be waived.

### Application Description

If requesting a waiver, complete the waiver application (refer to Appendix H)

## **PART C: ORGANIZATIONAL PLAN**

The organization plan should describe the organizational structure and management of the school. It should provide a clear picture of roles and responsibilities and how the school will function. The organizational plan should address:

- School governance including the founding and governing boards;
- Management and operation (Organizational structure, education service providers, resource management, school records, school policies);
- Staffing and human resources;
- Recruitment, employment and retention;
- Payroll;
- Certification;
- Records Management;
- Affiliations and Partnerships;
- Waivers needed to support the implementations of the organizational plan.

### **C1. School Governance**

#### Background Information for Consideration

Public School Charters are granted to a Board of Trustees or to an operator representing a non-profit organization. Members of boards of trustees are public agents authorized by the state and are responsible for governing public charter school. In general, it is important that individuals on the governing board possess a wide variety of skills and qualifications that will enable them to establish and sustain an excellent school. The Board of Trustees must be of a number sufficient to provide oversight of the school and to participate in the considerable amount of work required to open and then govern a public charter school.

The National Association of Charter School Authorizers (NACSA) (Cornell-Feist, 2007) recommends that governing board members have expertise in the following areas:

- Academic Oversight;

- Human Resources;
- Strategic Planning;
- Public Relations and Marketing;
- Legal and Financial Affairs; and
- Real Estate

Members of a founding group may be proposed for the school’s board of trustees for the non-profit organization or may assume other roles such as a Director of Operations in the school. The founding group is established from the date that it has its first organizing meeting through the time that the charter is granted. Once the charter is granted, the founding group adopts by-laws and elects officers, making it a true, legal governing board of trustees. Each founding group should be able to clearly define who is proposed to be a member of the board of trustees and what other roles will be assumed.

Application Description

- Describe the entity that will hold the charter and be responsible for governing the school. Provide documentation of the entity’s legal status including articles of incorporation, bylaws and documentation of legal not-for-profit status.
- To the extent that the organization exists and has functions independent of the operation of the proposed school, provide a brief description of the organization, its history, its current operation, and the relationship between its existing operations and the proposed school.
- **Governing Board Composition**
  - List the members of the proposed governing board including: their names, current employment and relevant experience or qualifications for serving on the board, including, but not limited to, their relationship to the community in which the school will be located. For each proposed governing board member, the application should include, as an attachment, a resume or curriculum vitae (CV).
  - Describe any specific plans for recruitment of additional governing board members, including, but not limited to, plans that would involve parental, professional educator or community involvement in the governance of the school. Briefly describe the recruitment and selection plans for board members.
  - Describe the orientation process for new board members.
  - Describe the process the board will use for its own evaluation and development.
- **School Management Contracts**
  - If the board of directors intends to enter into a contract with an educational management organization (EMO) (In Maryland for a profit entity cannot be a public charter school operator), provide the following:
    - Description of the proposed contract, including roles and responsibilities, performance evaluation measures, payment

structure, conditions for renewal and termination, and investment disclosure;

- Draft of the proposed management contract describing the services the EMO will be providing to the school;
- Recent corporate annual report and audited financial statements, and Maryland certificate of good standing;
- Description of the firm's roles and responsibilities for the financial management of the proposed public charter school, including descriptions of the accounting software to be used, the procedures for financial reporting to the board of directors, and the internal controls that will be in place for the proposed public charter school;
- Names, addresses and telephone numbers of other schools managed by the EMO, as well as descriptive information on the grades served, numbers of students, years of operation and student performance data; and
- A summary of the company's history, including a description of how it implements the program, past results of its management efforts, the company philosophy and the background on corporate leaders.

#### Required Exhibits

- Articles of Incorporation
- Maryland certificate of good standing (If new, provide application)
- Recent audit report
- Schedule for meetings
- By-Laws
- Prospective Board member's resumes

## **C2. Management and Operations**

### Background Information for Consideration

Management and operations processes are a group of activities which are recurring in nature and contribute significantly to the growth and development of the school as an organization. Managing these activities efficiently so that the maximum benefits can be captured is an essential component of organizational development and what helps to mold a high performing school.

Organizations with good management processes and skilled leaders have even managed to put an abstract activity such as innovation as part of their process management cycle. Even thinking or strategizing for the future is part of required management and operational processes since it involves a continuous cycle of school improvement. Thus, the first step in implementing effective management systems is to understand the range of activities and processes that must be designed, documented and implemented to ensure adherence to on a consistent and reliable basis. This section addresses several of these essential components including organizational structure, educational service providers, student records and school policies.

### **Organizational Structure**

#### Application Description

- Describe the organization structure of the school and its day-to-day operation.
- Explain the management roles and responsibilities of key administrators with respect to instructional leadership, curriculum development and implementation, personnel decisions, budgeting, financial management, legal compliance, and any special staffing needs. Your narrative should describe the primary responsibilities for each key management position and identify critical skills or experience that will be priorities for fulfillment of these responsibilities. Be sure to give particular attention to the roles, responsibilities and actual (If already identified) or desired qualification of the school leader.
- Discuss any plans for recruiting and selection of the school leader if no one is already identified.

Required Exhibits

- Organizational chart that shows the staffing structure and reporting responsibilities for the board, administration and staff.
- Key position descriptions including critical skills or experience every employee considered for hire based on organizational chart (Description can be general for core content teachers). Qualifications for hiring should provide assurance that background checks and child abuse registry will be conducted for every employee in accordance with the law.
- Proof of application to, or letter from, the Internal Revenue Service (IRS) documenting nonprofit status 501(3)(c) (IRS Form 1023). Once filed the IRS will send a commitment letter to verify non-profit status.

**Educational Service Providers**

Background Information for Consideration

The term Educational Service Provider (ESP) refers to organizations that contract with the governing board of a school to provide comprehensive services. The major types of ESPs that serve public charter schools are Education Management Organizations (EMOs), Charter Management Organizations (CMO) and comprehensive school design providers. The services agreement as executed between the school and the ESP (or template version if not yet executed) shall be attached to the application.

Application Description

- Indicate if your non-profit intends to contract with an education service provider (ESP). After making the initial declaration, applicants should complete the remainder of the section only if the school expects to contract with an ESP. Other applicants should proceed directly to the next section.

Select the statement that is applicable and proceed as directed.

We do not intend to contract with an education service provider. (Skip to the next section)

We intend to contract with an education service provider. (Continue with completion of this section.)

If the school expects to contract for services with an education service provider:

- Discuss the school's decision to work with an ESP, in general, and the selected ESP, in particular.
- Describe the planned relationship between the school and the ESP and how that relationship will further the school's mission and program.
- Provide a clear description of the services to be provided by the ESP.
- Describe the ESP's roles and responsibilities in relation to the school's management and governing board. Describe the school's performance expectations for the ESP. In other words, how will the school evaluate ESP performance?

#### Required Exhibits

- Background information on the ESP including relevant performance data for other schools that the ESP has managed and a list of any other schools managed by the ESP in the state;
- ESP financial records;
- Maryland certificate of good standing from Maryland Department of Assessments and Taxation;
- Contact information; and
- The services agreement as executed between the school and the ESP (or template version if not yet executed).

### **Resource Management and Evaluation**

#### Background Information for Consideration

Resource management includes planning for the allocation for using available resources, especially in the near term, to achieve goals for the future. It is the process of allocating resources among the various projects or business units. Such resources may include financial resources, supplies, equipment and space inventory, human skills or information technology (IT).

#### Application Description

- Describe the criteria to be used to procure, allocate, use and maintain resources in the school.
- Identify school goals and expectations and align these to the resources needed.
- Demonstrate that the management plan has adequately planned for available resources and allocates these in the most efficient way possible.
- Demonstrate the resource management process is linked to strategic and project planning.
- Include an assessment process that will review the usage of allocated resources to make needed adjustments.

### **Student Records and Record Management**

#### Background Information for Consideration

Student records provide a written picture of the academic performance of a child. Therefore, the orderly and complete maintenance of these records is necessary to ensure accurate information is available to plan for a child's education.

The Code of Maryland Regulations (COMAR) requires schools to have systems of information on enrollment, attendance and promotion. The student record system must be used to initiate student records for each student entering Maryland public schools. Each school is responsible for obtaining the required information in a manner that is most suitable to its own situation. The information that is recorded will be kept as a permanent record of the student and, therefore, must be accurate, readable and current. Care should be taken to avoid the possibility of invading the privacy of both students and parents or guardian. Personal information needed from a parent should be obtained at the time of registration. If it is not obtained at this time, personal information should be obtained in a later conference with the parent(s) or guardian(s).

**Note:** All student records are to be maintained in accordance with the Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g, and its implementing regulations, 34 C.F.R. Part 99; the Individuals with Disabilities Education Act, 20 U.S.C. § 1400 *et seq.*, and its implementing regulations, 34 C.F.R. § 300.561 – 300.576; the No Child Left Behind Act of 2001; the Code of Maryland Regulations 13A.08.02, Student Records; and Board of Education Policy and Superintendent’s Rule 2380 and the school system’s records management procedures.

### Application Description

Each school should develop and implement procedures to ensure that these data are collected, and records maintained accurately in accordance with the guidelines set forth in *Maryland Student Records Manual*.

- Describe the system for acquiring and maintaining student records as required by BCPS and in accordance with applicable laws.
  - Who will be responsible for collecting, maintaining, and using student record information?
  - How will the system be implemented and monitored for accuracy?
- How will the records be secured while the student is enrolled at the school?
  - Discuss how the school will comply with requests from parents or eligible students as pertains to the family educational rights and privacy act (FERPA).
  - How will the school ensure the confidentiality of these student records?
- Describe the system for disseminating information about students as required by BCPS and in accordance with applicable laws.
- If a student withdraws, what is the policy for releasing records?
- Describe your plan for ensuring that compliance requirements are monitored and met.

### **Charter School Procedures**

#### Background Information for Consideration

The public charter school must abide by the provisions of Board policies, Superintendent’s rules and established procedures of the school system.

The public charter school’s procedures help define rules, regulations and protocols for the public charter school. All of these are necessary to help a school run smoothly and safely and ensure that students receive a quality education. Schools have procedure for several reasons. Procedures guide acceptable behavior and ensure that the school environment is safe for students, teachers and

school staff. School procedures also help create a productive learning environment. (Refer to Appendix D)

#### Application Description

- Describe the procedures for how school operations are handles, down to very minute detail, so that educators, staff, and students know what is expected and can act accordingly.
- Students, teachers and staff members deserve to feel physically and psychologically secure in their environment. In order to create this environment, procedures are created and implemented that establish safety standards for the physical environment and mental state of students and staff. Describe procedures that have been established for the safety standards for the physical environment and mental state of students and staff. For example, fire drills, anti-bullying, and mental health guidelines.
- Explain the procedures which establish standards to hold schools and educators accountable to the public. Accountability through the use of goal-oriented procedures ensures that students are receiving a valuable education.
- List and describe the key procedures that will be necessary to develop before the opening of the school to ensure that the school is operated effectively and ensures that expectations and procedures are fully understood and implemented.
- Explain the enrollment procedures, including the order of selection; lotteries; and the decision making on enrollment of siblings, children of founders, and students after entry grades beyond the opening year.

### **C3. Staffing and Human Resources**

#### Background Information for Consideration

The Maryland Public Charter School Program Act defines all employees of the public charter school as public-school employees in the county in which the public charter school is located with rights afforded them under Maryland law. Therefore, public charter schools must comply with requirements and processes established by BCPS regarding recruiting, hiring, new employee processing, payroll, compensation, benefits, maintenance of certification, record keeping, legal costs, investigations and background checks, evaluations, negotiated agreements and employee leave.

**All employees of the public charter school are BCPS employees and entitled to all of the rights and privileges granted by the terms of the negotiated agreement. There are no exceptions.**

#### Application Description

- Exhibit a sound understanding of staffing needs that are aligned with the budget and with the school's anticipated enrollment.
- Provide a staffing plan that appears viable and adequate for effective implementation of proposed education.
- Describe a plan for the evaluation, retention and support of the teaching staff that is aligned with the state's approach to incorporating student status and growth data

in the evaluation and support of teachers; and present a plan that is reasonably likely to attract and retain effective staff.

- Provide a roster of all public charter school staff, identifying their proposed positions for each year of the charter. The roster should indicate and identify classroom teachers, any teaching aides or paraprofessionals, any specialty teachers, professional staff and support personnel.
- Detail the methodology employed to determine job positions, roles and responsibilities.
- Provide job descriptions for each staff member identified on the roster.
- Briefly describe the teaching program of typical teachers. Indicate how many hours they will be in the classroom and what other school-related responsibilities they will have outside the classroom (lunch duty, dismissal, advisory group, after-school activities, etc.)
- Provide information on volunteers or other non-employee individuals who might be engaged in assisting in the day-to-day activities of the public charter school on a full-or part-time basis.
- Describe personnel appraisal, evaluation, observation and accountability procedures for all staff on roster.

#### **C4. Recruitment, Employment and Retention**

##### **Background Information for Consideration**

High professional standards for teachers and other staff are essential to the success of the public charter school. The public charter school will be expected to work with BCPS department of Human Resources on all pertinent staffing, recruiting, compensation, benefits and other related human resources functions, administrative procedures and board policies and regulations.

##### **Application Description**

- Describe the standards that you will use to recruit, hire, train and retain highly qualified staff.
- Describe the process to utilize the BCPS online applicant process in recruiting all positions.
- Describe the plan for utilizing the BCPS' substitute teacher system.

#### **C5. Payroll**

##### **Background Information for Consideration**

The BCPS Office of Payroll is a part of the Department of Fiscal Services and is responsible for processing the payrolls of over 18,000 full-time and part-time employees and issues over 22,000 W2 forms at year end. The public charter school will be expected to work with BCPS Department of Fiscal Services on all pertinent payroll procedures.

##### **Application Description**

- Describe the plan for implementation of payroll processing according to the BCPS procedures and negotiated agreements, including pay for supplemental activities.
- Describe the plan to monitor and report employee leave.
- Describe the plan to adhere to court-ordered garnishment and levies.

## **C6. Certification**

### **Background Information for Consideration**

The BCPS Office of Certification is part of the Division of Human Resources and is responsible for ensuring that certificated staff achieve and maintain professional certification including evaluating educator credentials, issuing initial certificates, renewing certificates, and adding area endorsements. The public charter school will be expected to work with BCPS Division of Human Resources on all pertinent certification procedures.

### **Application Description**

- Describe how the public charter school will assist BCPS in monitoring and encouraging certificated staff employed at the charter school to maintain and renew certification.
- Provide a detailed plan to adhere to the certification process and to fulfill certification requirements. Discuss process for addressing the requirements of conditionally-certified employees.
- Describe the public charter school's role in maintaining highly qualified staff at all levels of the public charter school.
- Describe how professional development will adhere to BCPS policies and rules and will be offered to the teaching staff.

## **C7. Records Management**

### **Background Information for Consideration**

The BCPS Department of HR Operations is a part of the Division of Human Resources and is responsible for records management. The public charter school will be expected to work with BCPS Division of Human Resources on all pertinent records management procedures.

### **Application Description**

- Describe the charter school's records maintenance procedures including the process for ensuring that BCPS receives official personnel file documents. Describe procedures for handling employee records on location at the public charter school site.
- Describe the process to share BCPS employee record changes such as name, address, dependents, marriage, birth and adoption with the Division of Human Resources.
- Describe the plan for working with BCPS to respond to court-ordered subpoenas for employee records.
- Provide information on the plan to house the public charter school's copy of employee records and state which staff members will have access to these records and the rationale for such access.

## **C8. Affiliations and Partnerships**

### **Background Information for Consideration**

When community organizations are engaged in the life of a school, the resources available for teaching and the learning environment expand. When teachers and principals build trust with each other and extend that trust to their work with a school community, they can develop a common vision for school reform and work together to accelerate necessary growth and development in the

school. Additionally, an intersecting set of relationships among adults (parents, teachers, community and service providers) can provide a holistic environment in which students are supported with a unified set of expectations and behaviors.

The relationship between the school and other community institutions such as community organizations, businesses and churches can also be understood in this way. Interpersonal relationships built between individuals across these institutions provide the glue for innovative collaborations on the institutional level. These partnerships strengthen relationships among people in the entire community, building the collective capacity for schools to thrive in this way has a direct impact on student achievement.

#### Application Description

- Present a vision and strategy for community involvement that is reasonably like to further the school’s mission and program.
- Describe the scope of community support for the proposed charter school and its organizers.
- Provide a list of the organizations that will partner with your school and the focus of these partnerships. Discuss commitments (if any) for partnerships or other relationships with community organizations or individuals that would enrich the learning opportunities of students in your school, document any commitments with letters of support that identify specific details of the commitments.
- Describe the nature of potential partnerships including examples of how community partners will play an integral in the life of the school and identify specific organizations with which the school is already working, or likely to partner.
- Describe the coordination strategies that will integrate partnership activities into the school program and plans to further develop additional community partnerships.

### **C9. Waivers Needed to Support the Implementation of the Organizational Plan** (Refer to Appendix H)

#### Background Information for Consideration

There are some areas that cannot be waived according to Maryland’s Charter School Law – these are: audit requirements, student participation in the state assessments and the health, safety or civil rights of a student or an employee of the public charter school. It is important to remember that other areas pertaining to state, federal or local regulations and policy can be waived.

Some examples of areas that can be waived and apply to this section are as follows:

- Requirements that Charter Schools:
  - Receive and/or purchase centralized services from the school system;
  - Adhere to all school system policies and procedures; and
  - Participate in the choice process for student recruitment and lottery.

Research areas in law, regulations, policy and union contracts that can affect the successful implementation of the organizational plan proposed for your school identify waiver needs.

Follow the procedures described in the waiver document in the information section of this guide.

To access the COMAR regulations on-line, use the following link to the Web site of the Maryland Office of the Secretary of State: [HTTP:WWW.DSD.STATE.MD.US/COMAR/COMARHOME.HTML](http://www.dsd.state.md.us/comar/comarhome.html)

### Application Description

If requesting a waiver, complete waiver application (Refer to Appendix H)

## **PART D: BUSINESS PLAN**

The business plan should outline the management of financial and other procedures, pre-opening tasks, and detail the budget. The business plan should address: budget; financial management; facility; food services; transportation; and insurances.

### **D1. Budget**

#### Background Information for Consideration

A budget is a systematic method of allocating financial, physical and human resources to achieve strategic goals. Organizations develop budgets in order to monitor progress toward their goals, help control spending and predict cash flow. Because the budget expresses how resources will be allocated and what measures will be used to evaluate progress, budget development is more effective when linked to the organization's strategic plan. Linking the two gives all managers and employees a clearer understanding of strategic goals. This understanding, in turn, leads to greater support for goals, better coordination of tactic, and, ultimately, to stronger organizational performance.

#### Application Description

- Provide a detailed narrative regarding the school's estimated revenues and expenditures for the proposed term of the charter including the preoperational startup year.
- Provide a cash flow analysis for the first fiscal year of operation (July 1-June 30). Include explanation and discussion of key budget assumptions underlying the budget projections and explain how the budget aligns with and supports implementation of the educational program.
- If the school anticipated incurring debt for any reason, such as for acquisition of its facility, the budget must address the schedule for debt repayment and the budget discussion should elaborate on the repayment assumptions and plan.
- Discuss the school's contingency plans for cash flow challenges, a budget shortfall, lower than expected student enrollment or other financial challenges in the early years of operation.
- Provide an operating budget covering each year of the requested charter term that contains revenue projections, expenses and anticipated fund balances. The budget should be based on the projected student enrollment indicated on the cover page of the application. (See Appendix A2)
- Describe the school's fundraising plan.
- Report on the current status of any fundraising efforts, including verification of any fundraising monies reported in the school's start-up or operating budgets.

### Required Exhibits

- Budget for the proposed charter term (four years)
- Opening year cash flow analysis
- Pre-operational budget (Appendix A3)

## **D2. Financial Management**

### Background Information for Consideration

The financial plan should provide an understanding of how the applicants intend to develop and manage the school's infrastructure and finances. It should present a clear picture of the school's revenue projections, expenditure requirements, facility needs, transportation, food service plans, and pre-opening plan. Overall, the financial plan should reflect the commitment to maintaining the financial viability of the school.

### Application Description

- Demonstrate understanding of the school's financial management obligations.
- Present evidence that the school is prepared to adhere to generally accepted accounting practices.
- Show evidence that the school will have or has capacity to develop adequate policies and processes for tracking student enrollment and attendance eligibility, eligibility for free-and reduced-price lunch, special education and limited English proficient enrollment.
- Demonstrate preparation to meet its insurance, annual audit, annual financial report and other key financial management obligations.
- Submit a separate explanation and discussion of key budget assumptions underlying the budget projections and explain how the budget aligns with and supports implementation of the educational program. If the school anticipates incurring debt for any reason, such as for acquisition of its facility, the budget must address the schedule for debt repayment and the budget discussion should elaborate on the repayment assumptions and plan.
- Discuss the school's contingency plans for cash flow challenges: a budget shortfall, lower than expected student enrollment or other financial challenges that may occur in the early years of operation.
- Describe the systems and procedures for managing the school's finances and identify the staff position(s) that will be responsible for financial oversight and management.
- Describe how the school's finances will be managed and who will be responsible for the protection of financial records.
- Describe the method by which accounting records will be maintained.
- Describe the financial controls, including an annual audit and regular board review of financial statements, which will be employed to safeguard finances.
- The response should address, among other things, the school's plans in the following areas:
  - Provisions for an annual independent financial audit;
  - Development and dissemination of an annual financial report;
  - Internal controls and who is responsible;

- Documentation of federal Form 990 (IRS);
- Providing recommended liability insurance to indemnify the school, its board, staff and teachers against tort claims; and
- A four-year projected budget.

**D3. Facility** (Refer to Appendices J, K, L)

**Background Information for Consideration**

The Maryland Public Charter School Act states “a Public Charter Schools means a public school that is in compliance with all applicable health and safety laws.” Such requirements are a function of state and local building codes and are administered by the state and local inspection agencies. In addition, all public-school facilities must meet the procedures and guidelines of MSDE.

A Certificate of Occupancy issued by Baltimore County Government, a food service permit issued by Baltimore County Government Department of Health and a copy of the lease agreement (as required) must be presented to BCPS prior to receiving any funds before the first day of school.

**Application Description**

- Reflect a sound understanding of facilities’ needs. If the facility has not been established, provide the present option for building; specific boundary information (e.g. targeted 10 mile radius) on the planned school location; the facility plan, including spatial requirements (i.e. types of rooms, size and total square footage) to implement the program.
- If the program is to expand during the term of the agreement, describe how the facility will be expanded.
- Demonstrate knowledge of facilities costs including, as applicable, cost of purchasing, leasing, building or renovating and operating an educational facility that conforms to applicable health, safety and occupancy requirements.
- Present evidence that the proposed facility will be appropriate and adequate or present a plan for making the proposed facility appropriate and adequate, or present a plan for acquiring a facility that is appropriate and adequate for the school’s educational program, anticipated location, and target population. Describe plans to accommodate student and/or program expansion.
- Demonstrate that the school’s plan for acquisition of a facility is financially viable.
- Discuss any partnership developments, conversions, or future steps toward acquisition of a facility.
- Provide a description of the ownership or lease arrangements, including specific or potential conflict-of-interest and arrangements by which such conflicts will be managed or avoided.
- Outline plans for acquiring educational materials, supplies, furniture, technology and other equipment.
- Explain the anticipated costs for the facility, including renovation, rent, utilities and maintenance. Identify, if applicable, any funding sources (other than state and local funding) that will be applied to facilities-related costs.
- Describe the back-up facilities plan, what is the alternate plan for facilities if the proposed facility is not available or is determined to be inappropriate for the school’s opening.

#### **D4. Food Services**

##### **Background Information for Consideration**

Every school must meet the National School Lunch Requirements: <HTTPS://WWW.FNS.USDA.GOV/NSLP>.

Schools participating in the NSLP earn a fixed federal reimbursement for each school lunch program served consistent with United States Department of Agriculture (USDA) nutritional guidelines. All public and non-profit private schools can participate as long as they operate a non-profit food service program; agree to make meals available to students, using federally set income criteria; offer meals that need federally specified nutritional requirements; and follow the recordkeeping and claims procedures required by the USDA.

If the application is for a waiver to not participate in the school lunch program, complete the waiver in Appendix H. Waiver applicants must present a well-thought-out food service plan designed to meet the needs of the school's target population.

##### **Application Description**

- Describe the food services that the public charter school will provide to students, including whether the public charter school will provide breakfast and/or snack in addition to lunch.
- Indicate whether the public charter school will participate in the Federal school lunch or school breakfast programs.
- Indicate whether the public charter school will participate in the local school district's food service programs and whether food will be prepared on or off site.
- Describe the plan to administer the free and reduced lunch programs.
- Describe plans for food service facilities and equipment that will meet local and state requirements.

#### **D5. Transportation**

##### **Background Information for Consideration**

Charter proposals should include a plan that addresses the transportation needs of all pupils. Funds for student transportation are included in the per pupil allotment amount and school planners may choose to spend funds in a variety of ways. It is advisable to seek legal counsel on the proposed transportation plan regarding liability issues before submitting the final public charter school proposal.

##### **Application Description**

If the public charter school intends to contract with the Baltimore County Public Schools or any third party vendor for transportation services, the school must describe the plan and provide evidence of the third party's readiness and terms for providing services. The proposed transportation plan must be compliant with COMAR Regulation 13A.06.07 "Student Transportation" and consistent with Board policies and Superintendent's rules.

## **D6. Insurance**

### **Background Information for Consideration**

No applicant will receive final approval to open until a description of the public charter school's insurance coverage plans are provided, including:

### **Application Description**

Indicate the types of insurance and the levels of coverage sought. See information provided in Appendix M for insurance requirements in Maryland.

## **STEP 3: APPLICATION REVIEW FOR APPROVAL OR DENIAL**

### **Application Technical Review**

Within 30 calendar days of an application, BCPS staff will review the application for technical completion. If the technical elements of the application are found to be incomplete or do not meet the required components, the applicant will be notified that they are disqualified to enter the next stage of the approval process.

Due to the time-bound nature of the process, the authorizer will not extend an opportunity for the applicant to address deficiencies at any stage of the process once the application cycle has officially begun. It is therefore important to cross check the application carefully against the guidelines in the document before it is submitted.

### **Application Evaluation**

Once the application has been evaluated, applicants may be invited, along with their founding group and/or proposed Board of Directors, to participate in a final phase of the application process. The primary purpose of the interview is to assess the capacity of the Charter's Board of Directors to effectively oversee the school's academic program, organizational viability and finances.

The interview is designed to determine the founding group's understanding of academic and operational accountability as well as the demographics and other characteristics of the district where the proposed school will be located. In addition, the interview will provide opportunities to address questions generated by reviewers during the application review process, provide further verbal clarification or elaborate on responses within the written application. Results of those reviews will be presented to the Superintendent and Board of Education.

The Board's decision to approve or deny an application will occur within 120 calendar days of their receipt of the complete application and evaluation results.

## **STEP 4: THE CHARTER AGREEMENT**

Upon approval of the application by the Board of Education, a Charter Agreement shall be developed within 60 calendar days.

The Charter Agreement is a contract that is binding by law and explains in detail the responsibilities of all of the parties involved in the implementation of the public charter school. This legally enforceable document describes all aspects of the new public charter school and identifies the education program to be offered to students as well as the administrative activities

that will be undertaken in the establishment and operation of the public charter school. It also specifies that the local school system or public charter school operator will be responsible to fulfill the various elements, both programmatic and administrative, within the new program and the process and basis for terminating a Charter Agreement. The thoroughness of the application process can pave the way for the conversion of the approved application into the main component of the formal Charter Agreement. Additional negotiations may be limited depending on the thoroughness of the application process.

## SUMMARY

In summary, there is much to consider when a community contemplates establishing a public charter school. A prospective applicant should review the responsibilities and administrative functions that are required to operate a public charter school in order to maintain an informed application development process and assist in identifying the specific areas that will need consideration and inclusion within the Charter Agreement between the applicant and the Board of Education of Baltimore County.

Applicants are encouraged to use the following resources to the development of the application:

- [MSDE Office of School Innovations](#)
- [Maryland Alliance of Public Charter Schools](#)
- [National Alliance for Public Charter Schools](#)

It is important that the applicant(s) and the chartering authority establish open and effective communication. The understanding that the creation of a high-quality public charter school should be a rich opportunity to assist students to achieve high standards is a fundamental principle that must guide all aspects of the application development, review and program implementation.

COMMUNITY RELATIONS: Public Charter Schools

Public Charter Schools

I. Purpose

To establish guidelines for the establishment, evaluation, renewal, and/or closing of a public charter school under the supervision of the Board of Education of Baltimore County (Board).

II. Definition

*Submitted* – Means received by the Office of the Charter School Liaison. The documents will be deemed to have been timely submitted if they have been:

1. Delivered to the Charter School Liaison; or
2. Deposited in the United States mail as registered, certified, express or priority or deposited with a delivery service, such as federal express, UPS or DHL that provides verifiable tracking of the item from the point of origin before the documents are due.

III. Roles and Responsibilities

- A. The Charter School Liaison shall develop public charter school application procedures and make those procedures available on the school system's Web site.
- B. The public charter school applicant is solely responsible for meeting the criteria for establishing a public charter school and completing all requirements of the application process.

IV. Application Process

Eligible persons or entities interested in applying to operate a public charter school in BCPS may submit an application in accordance with Board Policy 1600, the following guidelines and any additional procedures promulgated by the Charter School Liaison.

A. Letter of Intent

1. Persons interested in operating a public charter school shall first submit to the Charter School Liaison a Letter of Intent for the proposed public charter school.

2. The Letter of Intent shall be submitted by no later than May 1, two years preceding the starting date of the proposed public charter school.
3. The Letter of Intent shall include:
  - a. A prospectus and contact information (See, *Charter School Application Procedures*, Appendix A1); and
  - b. A pre-operational budget (See, *Charter School Application Procedures*, Appendix A3).
4. The Charter School Liaison will review the Letter of Intent and notify the applicant in writing, within 10 business days of receipt, as to whether the information is sufficient to support the development of a formal application.
5. Applications will only be accepted from eligible applicants who have received written approval of the Letter of Intent.

B. Application

Those eligible applicants who have obtained the requisite written approval of the Letter of Intent may apply to operate a public charter school by submitting an application to the Charter School Liaison by January 2 of the year preceding the school's proposed starting date.

1. The applicant shall submit sixteen (16) copies of the application to the Charter School Liaison with appropriate permissions acknowledged for photocopying any material that is identified by the applicant as proprietary. An electronic copy of the application and all supporting documentation shall accompany the application submission.
2. The application shall include, but not be limited to, each of the components identified in Appendix C of the *Charter School Application Procedures*.
3. Incomplete applications will not be processed and the application shall be denied.

V. Application Review

- A. The Charter School Liaison will review completed applications submitted in accordance with established criteria and deadlines and forward those applications, with appropriate recommendations, to the Superintendent, who will in turn make a final recommendation to the Board for consideration.

- B. Upon receipt of a completed application, the Board shall render a decision within 120 calendar days and provide a detailed written recommendation with rationale for its decision for approval or denial of the application.

VI. Charter School Agreement

- A. Upon approval of a public charter school application, the Board-approved components of the application shall become part of a contractual charter between the public charter school and the Board.
- B. A charter will be granted for no longer than four (4) school years.

VII. Reporting Requirements

- A. Each public charter school shall provide a written annual report to the Superintendent by September 30. The report shall include:
  - 1. Fiscal accountability;
  - 2. Student performance; and
  - 3. Any other matter required by the charter agreement
- B. The public charter school shall comply with and provide information required to comply with financial, programmatic or compliance audits consistent with federal, state and local laws and procedures.
- C. The public charter school shall be prepared to respond to all requests for written/oral reports.
- D. The public charter school's annual report will be made available on the school system's Web site.

VIII. Evaluation

- A. The public charter school shall be evaluated annually based on student achievement, established goals/objectives, fiscal management and other criteria outlined in the approved application and the terms and conditions of the contractual charter.
- B. For a public charter school to remain in operation, it must be able to meet the needs of its students, maintain student enrollment levels and remain accountable under the terms of the charter agreement.

- C. The annual evaluation for each public charter school shall be posted on the school system's public charter school Web site in order to keep parents apprised of the school's performance.

IX. Provisions for Renewal

- A. The public charter school may request renewal of the existing charter agreement if done so by no later than September 30 of the year prior to the expiration of the charter agreement.
- B. A public charter school may be renewed, provided that a program review demonstrates that the school has successfully fulfilled the terms of its charter agreement.
- C. The following criteria will be analyzed to review the charter school's performance:
  - 1. Educational performance;
  - 2. Financial performance; and
  - 3. Organizational performance.
- D. Specific indicators and standards will be analyzed and evaluated within these three categories.
- E. The Community Superintendent will also collect information from the public charter school principal about the principal's plans over the term of its subsequent contract; specifically, any modifications, adjustments and amendments proposed to be made to its current contract that would take effect over the subsequent contract.
- F. The charter school shall provide the Charter School Liaison written notice in accordance with the notice requirements outlined in the charter agreement of a decision to close the charter school. Written notice should be made immediately upon the governing Board's decision, but no later than nine months prior to closure or expiration of its charter.

X. Probation/Revocation

In accordance with Policy 1600, if a charter school is being recommended for probation/revocation of its charter, the following procedures shall apply:

- A. The Superintendent or designee shall provide the charter school governing board with:
  - 1. Written notification and description of the basis for probation/revocation.
  - 2. Instructions for correcting the deficiency or failure that is the basis for probation/revocation, which may include a request for a corrective action plan.
  - 3. A specified reasonable time not to exceed ninety (90) calendar days during which the charter school governing board may remedy the problem to avoid the revocation action.
  
- B. If the charter school principal fails to remedy the problem within the specified time frame, the Superintendent may recommend in writing to the Board that it revoke the charter, with a copy provided to the charter school's governing board.
  
- C. The decision to revoke a public charter school's charter agreement will be made at a public meeting of the Board. Notice of public hearings concerning revocation of a charter agreement will be published on the school system's Web site as well as notice provided to parents of students enrolled in the public charter school.
  
- D. Upon revocation, personnel and students shall be reassigned pursuant to Board policy, Superintendent's rules and established school system procedures and negotiated agreements.
  
- E. Upon revocation, all resources purchased with federal, state and BCPS funds remain the property of BCPS.
  
- F. The Board reserves the right to implement control and operation of the public charter school on an immediate basis upon revocation.

XI. Appeals

If the Board denies an application to establish a public charter school, the applicant may appeal the decision to the Maryland State Board of Education within 30 days of the Board's decision in accordance with § 4-205(c) of the Education Article.

RULE 1600

Legal Reference: *Annotated Code of Maryland, Education Article, Title 9, Maryland Public Charter School Program*

Related Policy: Board of Education Policy 5150, *Resident and Nonresident Student Eligibility*

Rule

Superintendent of Schools

Approved: 10/21/03

Revised: 07/14/09

Revised: 07/14/12

Revised: 06/10/14

Revised: 04/09/20

## **APPENDIX A – LETTER OF INTENT**

Applicants are required to complete and send a Letter of Intent as the first step in the public charter school application process. Submission of a Letter of Intent implies no further obligation on either party.

Submission of this Letter of Intent expresses non-binding intent, as authorized by the public charter school's founding board members to submit an application for a public charter school by January 2 of the following year. The filing of the Letter of Intent may not be used for promotion or advertising, although it may be noted in internal school communications or as otherwise authorized by Baltimore County Public Schools. Please inquire with any questions regarding these restrictions.

Applicants are required to send a Letter of Intent and the accompanying Contact Information (Appendix A1), Prospectus (Appendix A2), and Pre-Operational Budget (Appendix A3) to the Baltimore County Public Schools' Charter School Liaison by May 1 two years prior to anticipated school opening (see instructions).

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### **Contents**

Providing a Letter of Intent gives the applicant an opportunity to share information and receive feedback informally from the Board of Education. In order for the Board to respond meaningfully, the following key components should be included in the Letter of Intent:

1. A brief explanation of the mission of the proposed charter school.
2. The proposed location of the charter school.
3. The name of the organizing group and primary contact person.

## APPENDIX A – LETTER OF INTENT

### Sample Letter

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Date

Baltimore County Public Schools  
Department of Educational Options  
Attn: Charter School Liaison  
105 W. Chesapeake Ave.  
Towson, Maryland 21204

RE: Public Charter School Letter of Intent

Dear Charter School Liaison:

Provide a brief explanation of the mission, purposes and location of the proposed school.

Sincerely,

Name of Public Charter School Sponsor  
Title

**APPENDIX A3 - PRE-OPERATIONAL BUDGET**

A public charter school is likely to incur considerable costs before it receives its first distribution. A pre-operational budget must be submitted with the Letter of Intent and with the Application.

<b>Revenue-Sources of Funding</b>	<b>Budget Amount</b>	<b>Specific Source</b>
Federal Funding		
Start-Up Grant (specify)	\$	
Other (specify)	\$	
State Funding		
Other (specify)	\$	
Local and Private Funding		
Fundraising	\$	
Contributions	\$	
Local Foundation and Grant Support	\$	
<b><i>Other Financing Sources</i></b>		
Lines of Credit	\$	
Loans	\$	
Other (specify)	\$	
<b>TOTAL REVENUE</b>	\$	
<b>Expenditures</b>	<b>Budget Amount</b>	<b>Assumptions (e.g., 40 hours of consulting at \$100/hour)</b>
Legal Fees	\$	
Accounting and Consultation Fees	\$	
Fundraising Fees	\$	
Marketing (including postage, printing)	\$	
Recruitment-Students	\$	
Recruitment-Staff	\$	
Curriculum Development	\$	
Staff/Board Development	\$	
Staff Stipends	\$	
Equipment and Supplies	\$	
Information Technology	\$	
Rent	\$	
Capital	\$	
• Land		
• Improvements on Land		
• Principal on Debt		
• Interest on Debt		
Utilities	\$	
Telephone/Fax	\$	
Travel	\$	
Charter School fees	\$	
Other (specify)	\$	
<b>TOTAL EXPENDITURES</b>	\$	

**Operating Budget (SAMPLE for Application)**

**Operating Budget: Projected Revenues and Expenditures Page 1**

<b>Public Charter School:</b>	<b>Year One</b>	<b>Year Two</b>	<b>Year Three</b>	<b>Year Four</b>
	<b>Fiscal Year</b>	<b>Fiscal Year</b>	<b>Fiscal Year</b>	<b>Fiscal Year</b>
<b>MAJOR ASSUMPTIONS</b>				
Student Enrollment				
Facility Size (square footage)				
Average Teacher Salary				
Student/Teacher Ratio				
<b>REVENUE</b>				
<i>Revenue From State Source</i>				
Per Pupil Allocation				
State Entitlements				
State Grants				
Transportation Subsidy or In-kind Services				
<i>Revenue From Federal Sources</i>				
Federal Entitlements				
Federal Direct Grants				
Federal Revenue Pass Through the State				
Federal Revenue Pass Through Another Agency (specify)				
School Lunch				
<i>Revenue From Local Sources</i>				
Private or Foundation Grant Revenue				
Fundraising				
Investment Income				
Program Fees				
Facilities Rental				
<i>Other Revenue</i>				
(Specify)				
<b>TOTAL REVENUE</b>				
<b>EXPENDITURES</b>				
<i>School Administration</i>				
Salaries and Wages - School Director				
Salaries and Wages - Supervisors				
Salaries and Wages – Office Professional Staff				
Fringe Benefits - Health Insurance				
Fringe Benefits - Retirement Benefits				

**Operating Budget: Projected Revenues and Expenditures – Continued – Page 2)**

Unemployment/Workers Compensation				
Office Supplies				
Equipment and Furniture				
Information Technology				
Contractual Management Services				
<b><i>Subtotal - School Administration</i></b>				
<b><i>Instructional Staff</i></b>				
Salaries and Wages - Full-Time Teachers				
Salaries and Wages - Part-Time Teachers				
Salaries and Wages - Substitutes				
Fringe Benefits - Health Insurance				
Fringe Benefits - Retirement Benefits				
Unemployment/Workers Compensation				
<b><i>Subtotal - Instructional Staff</i></b>				
<b><i>Instructional</i></b>				
Contract Labor - Instructional Consultants				
Contractual Management Services				
Professional Development				
Special Education				
Student Assessment/Testing				
Supplies/Materials - Instructional Classroom Furniture				
Equipment - Instructional Textbooks				
Information Technology				
Computer Supplies and Repairs				
Library				
<b><i>Subtotal - Instructional</i></b>				
<b><i>Business Services</i></b>				
Accounting				
Advertising				
Public Relations/Marketing				
Insurance - General Liability				
Insurance - Vehicle				
Insurance - Other (specify)				
Office Expenses				
Fees, Licensing, Dues, and Memberships				
Contractual Management Services				
Payroll Services				
Postage and Shipping				

<b>Operating Budget: Projected Revenues and Expenditures (Continued – Page 3)</b>				
Printing				
Telephone				
Travel				
<b>Subtotal - Business Services</b>				
<b>Operations and Maintenance</b>				
Contract Labor - Non-Instructional				
Custodial Services				
Maintenance - Vehicle				
Maintenance - Facility				
Maintenance - Office Equipment				
Supplies/Materials - Maintenance				
<b>Subtotal - Operations and Maintenance</b>				
<b>Physical Plant</b>				
Rent				
Mortgage				
Renovation/Construction				
Capital Debt Service				
Utilities				
<b>Subtotal - Physical Plant</b>				
<b>Student Services</b>				
Health				
Transportation				
Food				
Recreation				
<b>Subtotal - Student Services</b>				
<b>Miscellaneous</b>				
Audit				
Advertising				
Dues and Subscriptions				
Workshops and Conferences				
Fundraising				
Legal				
Contingency Fund				
<b>Subtotal - Miscellaneous</b>				
<b>TOTAL EXPENDITURES</b>				

**Operating Budget: Projected Revenues and Expenditures (Continued – Page 4)**

**Operating Budget - Revenue Summary**

	Year One	Year Two	Year Three	Year Four
	Fiscal Year	Fiscal Year	Fiscal Year	Fiscal Year
Revenue Source	_____	_____	_____	_____
Local				
State				
Federal				
Other				
<b>TOTAL</b>	\$ _____	\$ _____	\$ _____	\$ _____

Are any major changes in the revenue sources expected during this four-year projection? If yes, explain in detail and include calculations. Attach additional sheets if necessary.


What contingency plans have been made if revenues are not received or are lower than budgeted?

--

**Operating Budget-Expenditure Summary Detail Part I**

	Year One	Year Two	Year Three	Year Four
	Fiscal Year	Fiscal Year	Fiscal Year	Fiscal Year
<b>Expenditure Function</b>	_____	_____	_____	_____
School Administration				
Instruction (Including Staff)				
Business Support Services				
Operations and Maintenance				
Physical Plant				
Student Services				
<b>TOTAL</b>				

Explain specific financial goals and objectives for the first four operating years (i.e., capital improvements, curriculum purchases, increased staffing needs, etc.)

--

<b>Combined Revenue and Expenditure Summary</b>				
	Year One	Year Two	Year Three	Year Four
	Fiscal Year	Fiscal Year	Fiscal Year	Fiscal Year
	_____	_____	_____	_____
Total Per Pupil Revenue (including all sources)				
*Per Pupil Expenditures:				
Instructional				
Business and Administration				
Operations and Maintenance and Physical Plant				
Total Per Pupil Expenditures				
*Explain how the projected per-pupil expenditures are aligned with the school's mission statement.				
<b>Operating Budget-Expenditures By MSDE Function Detail Part II</b> <b>(Reference Financial Reporting Manual for Maryland Public Schools</b> <b><a href="http://marylandpublicschools.org/about/Pages/DBS/Local-Finance-Reporting/FinancialReportingManual.aspx">http://marylandpublicschools.org/about/Pages/DBS/Local-Finance-Reporting/FinancialReportingManual.aspx</a>)</b>				
	Year One	Year Two	Year Three	Year Four
	Fiscal Year	Fiscal Year	Fiscal Year	Fiscal Year
<b>Expenditure Function</b>	_____	_____	_____	_____
Administration				
Mid-level Administration				
Instructional Salaries (Including Staff)				
Instructional Textbooks and Supplies				
Other Instructional Costs				
Special Education				
Student Personnel Services				
Health Services				
Student Transportation				
Operation of Plant				
Maintenance of Plant				
Fixed Charges				
Capital Outlay				
TOTAL				
Explain specific financial goals and objectives for the first four operating years (i.e., capital improvements, curriculum purchases, increased staffing needs, etc.)				

**APPENDIX A1 - PUBLIC CHARTER SCHOOL CONTACT INFORMATION**

CONTACT INFORMATION			
Name of Group Applying for Public Charter School:			
Type of Applicant: <input type="checkbox"/> Parents <input type="checkbox"/> Teachers <input type="checkbox"/> School Administrator <input type="checkbox"/> Community Resident		<input type="checkbox"/> Nonsectarian-Nonprofit <input type="checkbox"/> Nonsectarian-Higher Education <input type="checkbox"/> Other (Please provide additional details)	
Primary Contact Person:		Title:	
Business Mailing Address:		City	State      Zip Code
Daytime Telephone:	Email Address:	Web site:	
PROPOSED PRINCIPAL – HEAD OF SCHOOL - DIRECTOR			
Name		Title	
Mailing Address:		City	State      Zip Code
Daytime Telephone:	Cell Phone Number:	E-mail Address:	
FOUNDING BOARD MEMBERS			
1. Name – First/Last:		Address:	
Occupation:		City:	State:      Zip
Business Phone:		E-mail Address:	
Cell Phone:			
2. Name – First/Last:		Address:	
Occupation:		City:	State:      Zip
Business Phone:		E-mail Address:	
Cell Phone:			
3. Name – First/Last:		Address:	
Occupation:		City:	State:      Zip
Business Phone:		E-mail Address:	
Cell Phone:			
4. Name – First/Last:		Address:	
Occupation:		City:	State:      Zip
Business Phone:		E-mail Address:	
Cell Phone:			
PROPOSED CHARTER SCHOOL			
Name of proposed public charter school: (Note: The words “public charter school” must be in the name)			
Proposed location of public charter school:			
Please check one of the following. <input type="checkbox"/> For Profit <input type="checkbox"/> Non-Profit <input type="checkbox"/> Other			
If other, please explain:			

**APPENDIX A1 - PUBLIC CHARTER SCHOOL CONTACT INFORMATION**

Grades Served/Enrollment:

Grades: \_\_\_\_\_

Projected Expansion, if any: \_\_\_\_\_

Total Projected School Enrollment: \_\_\_\_\_

**Curricular Highlights**

(e.g., direct instruction, core knowledge of subject areas, etc.)

**Additional Comments**

**IF ADDITIONAL SPACE IS NEEDED WHEN RESPONDING, PLEASE ATTACH A SEPARATE SHEET OF PAPER.**

\_\_\_\_\_  
Signature (Charter Sponsor)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name: (Please Print)

## APPENDIX A2 - PUBLIC CHARTER SCHOOL PROSPECTUS GUIDELINES

Applicants are required to submit with their Letter of Intent a Prospectus summarizing their proposal prior to submitting a full application. The submission of this prospectus implies no further obligation on either party. Below is a list of required contents, as well as directions for meeting the format requirements and deadline.

### Contents

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The Prospectus should be a five to ten page summary of the charter proposal consisting of:

1. The name and the location of the proposed public charter school. (The name of the school must include the words “Public Charter School” in the title.)
2. The applicant’s mission statement and identified focus of the school. The primary mission must remain focused on student academic achievement.
3. The applicant’s vision for what the school intends to do, for whom and to what degree.
4. Specific plans and strategies for developing and delivering educational programs, including the proposed educational program’s goals and objectives and the applicant’s plan for meeting the proposed goals.
  - a. How the public charter school would improve the academic performance of Baltimore County Public Schools (BCPS).
  - b. How the public charter school would enhance the curricular and instructional programs of BCPS.
  - c. How the public charter school would address improved student performance on accountability measures.
5. Specific educational results, including student academic outcomes and how they will be measured.
6. Student recruitment and admission procedures, including population to be served (geographic area; grade levels; number of students initially, when at full capacity; number of students currently BCPS students, etc.)
7. A brief description of the business plan, including financial management capabilities, potential partners, access to financial resources and legal accountability for the operation of the public charter school.
8. A description of the founding team’s capacity to implement the educational plan and business plan.
9. General governance structure, including leadership information for the applicant’s authorized school leader(s) and governing board members.

**(Note:** Several sections of the full application will ask for the same or similar information as the Prospectus. Further expansion of information will be required in the full application.)

### Format

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The Prospectus should adhere to the following format:

1. White, 8.5” x 11” paper with one-inch margins on all sides
2. No font smaller than 11-point
3. Formatting may not be more compact than standard single space
4. Spiral-bound or 3-ring binders (no paper clips or folders)

Additional information that supports the narrative may be included as attachments. Choice of attachments are up to the applicant, though they should be used to provide evidence, support a particular aspect of the Prospectus, or lend insight into the applicant, its leadership, or management personnel. Examples of attachments in the Prospectus include curriculum samples, academic standards, letters of support, financial statements, etc. All attachments should be numbered and clearly referred to by number in the Prospectus narrative.

## APPENDIX D: QUALITATIVE SCORING TOOL

### BCPS Qualitative Scoring Tool for Charter School Applications



Name of Proposed Charter School:  
Date of Completed Technical Review:  
Date of Completed Qualitative Review:

This standard scoring sheet should be completed as a qualitative review of a charter school application.

#### **To the reviewer:**

The charter school application must be aligned with the vision and purpose expressed in *The Compass . . . Our Pathway to Excellence*. The vision is that Baltimore County Public Schools will be among the highest performing school systems in the nation as a result of raising the bar, closing gaps, and preparing every student for the future. Our purpose is to increase achievement for all students while preparing a variety of pathways to prepare students for career and college, in a safe, orderly, and caring environment for students and staff.

#### **Qualitative Review:**

An application that merits a qualitative recommendation for approval should present a clear, realistic picture of how the school expects to operate; be detailed in how this school will raise student achievement; and inspire confidence in the applicant's capacity to successfully implement the school's proposed academic and operational plans. In addition to meeting the criteria that are specific in each section, each part of the proposal should align with the school's overall mission, budget, and goals. Finally, the application should be aligned with the current policies, rules and practices of the BCPS school system.

Evaluators will use the following ratings to complete a qualitative review of the application. Evaluators will rate the responses by applying the following guidance:

#### **Meets the Standard (X)**

Response includes specific and accurate information that shows thorough preparation. The response reflects a thorough understanding of key issues and demonstrates an alignment with the school's overall mission, budget, and goals and is complimentary to BCPS's vision and purpose.

#### **Does Not Meet Standard (O)**

Response lacks sufficient detail and demonstrates a lack of preparation and/or is significantly incomplete, needing additional information in one or more areas. The response raises significant concerns about the viability of the plan or the applicant's ability to carry it out. The response is unsuited to BCPS's vision and purpose.

Recommendations for approval or denial will be based on the qualitative review of the written application and potential applicant capacity interview. For each listed section, indicate a rating of the applicant's response based on the criteria outlined above. Provide brief comments to support your ratings and any clarifying questions raised by the application.

## APPENDIX D: QUALITATIVE SCORING TOOL

### Part A. Overview

<b>A1. Executive Summary</b>	
<p><b>Applicant Description:</b> The executive summary should be an overall summary of the proposed public charter school's purpose, mission and goals. It should give school system officials a broad idea of your vision for the school and be focused enough to describe the specific mission that would make this school unique.</p> <p>The public charter school's mission statement should be clear, concise and articulate the school's central purpose and goals. It should state the school's reason for existence and communicate the school's uniqueness. The mission will guide your school's instructional and non-instructional program.</p>	
<p><b>Overall Qualitative Rating for this Application Section:</b></p> <p><input type="checkbox"/> Meets Standards      <input type="checkbox"/> Does Not Meet Standards</p>	
<p><b>Comments:</b></p> <p><b>Clarifying Questions Based on this Application Section:</b></p>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>A2. Profile of Founding Group</b>	
<b>Applicant Description:</b> Describe the composition of the group or partnership that is working together to apply for a charter, which demonstrates a track record of success in developing a program which will assist students in meeting rigorous academic standards.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>A3. Background Information</b>	
<b>Applicant Description:</b> Please provide the following information on the founding group members currently involved with the development of the charter school, the authorized agent, principal and any individuals responsible for the day to day operation of the school. A resume for each individual is also required. <ol style="list-style-type: none"><li>1. References</li><li>2. Employment History</li><li>3. Education History</li><li>4. Statement of Intent</li><li>5. Affidavit, disclosure and consent for background and credit check (see Appendix G)</li></ol>	
<b>Overall Qualitative Rating for this Application Section:</b> <input type="checkbox"/> Meets Standards <input type="checkbox"/> Does Not Meet Standards	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>  	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

**Part B. Educational Plans**

<b>B1. Educational Design</b>	
<p><b>Applicant Description:</b> Describe the proposed charter school’s educational design. The educational design is made up of those elements in the proposed school that will be implemented to create programs, systems and processes to ensure that the school’s mission and vision are accomplished successfully. Elements of a school design must address: alignment of goals and objectives to the school; school size, special programs that will be offered; how professional development will be designed; instructional frameworks; the use and infusion of technology; the use of partnerships; performance, promotion and graduation standards; and how resources (time, space and human capital) will be allocated.</p>	
<p><b>Overall Qualitative Rating for this Application Section:</b></p> <p><input type="checkbox"/> <b>Meets Standards</b>      <input type="checkbox"/> <b>Does Not Meet Standards</b></p>	
<p><b>Comments:</b></p>  <p><b>Clarifying Questions Based on this Application Section:</b></p>  	
<p><b>Completed by:</b></p>	<p><b>Date:</b></p>

## APPENDIX D: QUALITATIVE SCORING TOOL

### B2. Curriculum and Instruction

#### Applicant Description:

Provide a substantive overview of the curriculum including how the public charter school will maintain consistency between the mission, curriculum, and student population to be served.

Discuss the specific instructional strategies/ methods that will be relevant or necessary to successful implementation of the curriculum.

Discuss how curriculum and instruction needs are reflected in plans for professional development.

Describe the process and procedures used to evaluate whether the curriculum is effective and successfully implemented.

Explain how the school will ensure that teachers are proficient in delivering the chosen instructional methods.

Describe strategies for differentiating instruction for above, average, and low performing students.

Describe, and present the rationale for the instructional materials to be adopted.

For secondary programs, describe how the courses and curricula will prepare students for career-ready and college-level work.

For virtual learning opportunities, describe the following, if applicable:

Courses and/or programs to be offered online and offline.

Describe the teachers' roles and how they will differ from traditional roles with online courses.

The technology, including types of hardware, software, equipment, and other materials the school will provide and the plan for providing and handling materials.

Plan for technical support and troubleshooting for students, teachers, administrators, and parents.

Back-up plan for delivering instruction in the case of technical or other delivery problems that may arise.

#### Overall Qualitative Rating for this Application Section:

Meets Standards       Does Not Meet Standards

#### Comments:

#### Clarifying Questions Based on this Application Section:

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>B3. Special Student Populations</b>	
<b>Applicant Description:</b>  Describe the public charter school’s ability to maintain Compliance with applicable regulations to meet the needs of English learners and students with special needs in the school program.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>B4. Student Recruitment, Admission and Enrollment</b>	
<b>Applicant Description:</b>  Outline the procedures developed to determine eligibility for students in accord with the above. Application forms should request at a minimum: the student's name; date of birth; grade level; address; names, addresses and telephone numbers of parents/guardians; names of siblings also applying; and a signature verifying that the information is correct and that the parents/guardians are choosing education at the public charter school for their child. Application forms cannot contain any information regarding previous grade reports, IEPs, English language proficiency, FARMS, previous school, health, discipline, attendance, etc.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

## APPENDIX D: QUALITATIVE SCORING TOOL

### B5. Code of Student Conduct

#### Applicant Description:

Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social emotional development.

Explain the school's student behavior philosophy for both the general student population and for students with special needs.

State whether the proposed school intends to use Baltimore County Public Schools' Student Handbook. If the proposed school does not intend to use the Student Handbook, describe in detail the proposed school's approach to student discipline. If already developed, provide the proposed discipline policy or student code of conduct as an attachment. Discipline policies and procedures related to students identified with disabilities and under Section 504 of the Rehabilitation Act must be in accordance with federal, state and local regulations. Refer to the MSDE website of the Special Education and Early Intervention Division for publications on the discipline of students with disabilities:  
[http://marylandpublicschools.org/MSDE/divisions/earlyinterv/Special\\_Ed\\_Info](http://marylandpublicschools.org/MSDE/divisions/earlyinterv/Special_Ed_Info)

Describe the strategies the proposed school will employ to develop and sustain a safe and orderly school climate that supports fulfillment of the educational goals.

Explain the practices the school will use to promote schoolwide positive behavior, including both incentives for positive behavior and penalties for infractions.

Describe procedures for due process when a student is suspended or recommended to BCPS for expulsion as a result of a violation, including a description of the appeals process that the school will employ for students facing recommended expulsion and a plan for providing services to students who are out of school for more than ten days.

Explain the process for informing students and parents about their rights and responsibilities under the code of conduct.

#### Overall Qualitative Rating for this Application Section:

Meets Standards       Does Not Meet Standards

#### Comments:

#### Clarifying Questions Based on this Application Section:

Completed by:

Date:

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>B6. Student Health and Safety</b>	
<b>Applicant Description:</b>  Describe how you will prepare a student health and SCHOOL safety plan. List the elements that will be part of your plan and why these components are important to include in your plan.  Explain how you will ensure that you are following federal, state, and local regulations.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> Meets Standards <input type="checkbox"/> Does Not Meet Standards	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>B7. School Calendar and Daily Schedule</b>	
<b>Applicant Description:</b>  Describe the school’s daily schedule and annual calendar, including the annual number of days and hours of instructional time.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>B8. Assessment</b>	
<b>Applicant Description:</b>  Describe the school's approach to an assessment system. The proposed system should reflect how the school would link curriculum and instruction to assessment by measuring the academic progress of individual students, cohorts of students over time and students in school as a whole, with the goal of continual school improvement.  In responding to this section, consider the following:  How will the school use student assessment data to drive key decisions aimed at the evaluation, retention and support of the teaching staff, aligned with the state's approach to incorporating status and growth data? Consider how the plan will use disaggregating data to ensure growth and achievement of all student groups including by race and by services received (IEP, EL, etc.)	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>B9. Family Involvement</b>	
<b>Applicant Description:</b>  Describe how the school plans to build and maintain family-school partnerships that focus on strengthening support for student learning, improving communication, and encouraging parental involvement in school operations.  Explain how you will work with parents and provide the information and training that enables them to support their children’s involvement.  Explain how parents will be involved in the governance of the charter school.  Identify methods for handling disputes between parents and the school.  Describe how parental satisfaction will be obtained and the process for gathering and publicizing parental satisfaction results.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>B10. Waivers for Educational Plan</b>	
<b>Applicant Description:</b> If requesting a waiver, complete waiver application (refer to appendix H).	
<b>Overall Qualitative Rating for this Application Section:</b> <input type="checkbox"/> Meets Standards <input type="checkbox"/> Does Not Meet Standards	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

## APPENDIX D: QUALITATIVE SCORING TOOL

### Part C. Organizational Plan

#### C1. School Governance

##### Applicant Description:

Describe the entity that will hold the charter and be responsible for governing the school. Provide documentation of the entity's legal status including Articles of Incorporation, Bylaws and documentation of legal not-for-profit status. To the extent that the organization exists and has functions independent of the operation of the proposed school, provide a brief description of the organization, its history, its current operation, and the relationship between its existing operations and the proposed school.

##### A. Governing Board Composition:

- List the members of the proposed governing board including: their names, current employment and relevant experience or qualifications for serving on the board, including, but not limited to, their relationship to the community in which the school will be located. For each proposed governing board member, the application should include, as an attachment, a resume or Curriculum Vitae (CV).
- Describe any specific plans for recruitment of additional governing board members, including, but not limited to, plans that would involve parental, professional educator or community involvement in the governance of the school. Briefly describe the recruitment and selection plans for board members.
- Describe the orientation process for new board members.
- Describe the process the board will use for its own evaluation and development.

##### B. School Management Contracts

- If the Board of Directors intends to enter into a contract with an educational management organization (EMO) (in Maryland a for profit entity cannot be a charter school operator), provide the following:
  - a. Description of the proposed contract, including roles and responsibilities, performance evaluation measures, payment structure, conditions for renewal and termination, and investment disclosure;
  - b. Draft of the proposed management contract describing the services the EMO will be providing to the school;
  - c. Recent corporate annual report and audited financial statements, and Maryland Certificate of Good Standing;
  - d. Description of the firm's roles and responsibilities for the financial management of the proposed charter school, including descriptions of the accounting software to be used, the procedures for financial reporting to the Board of Directors, and the internal controls that will be in place for the proposed charter school;
  - e. Names, addresses and telephone numbers of other schools managed by the EMO, as well as descriptive information on the grades served, numbers of students, years of operation and student performance data; and
  - f. A summary of the company's history, including a description of how it implements the program, past results of its management

**APPENDIX D: QUALITATIVE SCORING TOOL**

efforts, the company philosophy and the background on corporate leaders.	
<i>Required Exhibits</i>	
<ul style="list-style-type: none"><li>• Articles of Incorporation</li><li>• Maryland Certificate of Good Standing (If new, provide application)</li><li>• Recent audit report</li><li>• Schedule for Meetings</li><li>• By-laws</li><li>• Prospective Board Members' Resumes</li></ul>	
<b>Overall Qualitative Rating for this Application Section:</b>	
<input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>	
<b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

## APPENDIX D: QUALITATIVE SCORING TOOL

### C2. Management and Operations

#### Applicant Description:

#### 1. Organization Structure

Describe the organizational structure of the school and its day-to-day operation.

Explain the management roles and responsibilities of key administrators with respect to instructional leadership, curriculum development and implementation, personnel decisions, budgeting, financial management, legal compliance, and any special staffing needs. Your narrative should describe the primary responsibilities for each key management position and identify critical skills or experience that will be priorities for fulfillment of these responsibilities. Be sure to give particular attention to the roles, responsibilities and actual (if already identified) or desired qualifications of the school leader.

Discuss any plans for recruiting and selection of the school leader if no one is already identified.

#### Required Exhibits

- Organizational Chart that shows the staffing structure and reporting responsibilities for the board, administration and staff.
- Key position descriptions including critical skills or experience every employee CONSIDERED FOR hire based on organizational chart (description can be general for core content teachers). Qualifications for hiring should provide assurance that background checks and child abuse registry will be conducted for every employee in accordance with the law.
- Proof of application to, or letter from, the Internal Revenue Service (IRS) documenting nonprofit status 501(3) (c) (IRS Form 1023). Once filed the IRS will send a commitment letter to verify non-profit status.

#### 2. Education Service Providers

Indicate if your non-profit intends to contract with an education service provider (ESP). After making the initial declaration, applicants should complete the remainder of the section only if the school expects to contract with an ESP. Other applicants should proceed directly to the next section.

Select the statement that is applicable and proceed as directed:

- We do not intend to contract with an education service provider. Skip to the next section.
- We intend to contract with an education service provider. ***Continue with completion of this section.***

If the school expects to contract for services with an education service provider:

- Discuss the school's decision to work with an ESP, in general, and the selected ESP, in particular.

## APPENDIX D: QUALITATIVE SCORING TOOL

- Describe the planned relationship between the school and the ESP and how that relationship will further the school's mission and program.
- Provide a clear description of the services to be provided by the ESP.
- Describe the ESP's roles and responsibilities in relation to the school's management and governing board. Describe the school's performance expectations for the ESP. In other words, how will the school evaluate ESP performance?

### Required Exhibits

- Background information on the ESP including relevant performance data for other schools that the ESP has managed and a list of any other schools managed by the ESP in the State;
- ESP financial records;
- Maryland Certificate of Good Standing from Maryland Department of Assessments and Taxation;
- Contact information; and
- The services agreement as executed between the school and the ESP (or template version if not yet executed).

### 3. Resource Management and Evaluation

- Describe the criteria to be used to procure, allocate, use and maintain resources in the school.
- Identify school goals and expectations and align these to the resources needed.
- Demonstrate that the management plan has adequately planned for available resources and allocates these in the most efficient way possible.
- Demonstrate the resource management process is linked to strategic and project planning.
- Include an assessment process that will review the usage of allocated resources to make needed adjustments.

### 4. Student Records and Record Management

Each school should develop and implement procedures to ensure that these data are collected and records maintained accurately in accordance with the guidelines set forth in Maryland Student Records Manual.

- Describe the system for acquiring and maintaining student records as required by the district and in accordance with applicable laws. Who will be responsible for collecting, maintaining, and using student record information? How will this system be implemented and monitored for accuracy?
- How will the records be secured while the student is enrolled at the school? Discuss how the school will comply with requests from parents or eligible students as pertains to the Family Educational Rights and Privacy Act (FERPA). How will the school ensure the confidentiality of these student records?
- Describe the system for disseminating information about students as required by the district and in accordance with applicable laws.
- If a student withdraws, what is the policy for releasing records?
- Describe your plan for ensuring that compliance requirements are monitored and met.

### 5. Charter School Procedures

## APPENDIX D: QUALITATIVE SCORING TOOL

Describe the procedures for how school operations are handled, down to every minute detail, so that educators, staff, and students know what is expected and can act accordingly.

Students, teachers and staff members deserve to feel physically and psychologically secure in their environment. In order to create this environment, procedures are created and implemented that establish safety standards for the physical environment and mental state of students and staff. Describe procedures that have been established for the safety standards for the physical environment and mental state of students and staff. For example, fire drills, anti-bullying, and mental health guidelines.

Explain the procedures which establish standards to hold schools and educators accountable to the public. Accountability through the use of goal-oriented procedures ensures that students are receiving a valuable education.

List and describe the key procedures that will be necessary to develop before the opening of the school to ensure that the school is operated effectively and ensures that expectations and procedures are fully understood and implemented.

Explain the enrollment procedures, including the order of selection; lotteries; and the decision making on enrollment of siblings, children of founders, and students after entry grades beyond the opening year.

### Overall Qualitative Rating for this Application Section:

Meets Standards       Does Not Meet Standards

### Comments:

### Clarifying Questions Based on this Application Section:

Completed by:

Date:

## APPENDIX D: QUALITATIVE SCORING TOOL

### C3. Staffing and Human Resources

#### Applicant Description:

Exhibit a sound understanding of staffing needs that are aligned with the budget and with the school's anticipated enrollment.

Provide a staffing plan that appears viable and adequate for effective implementation of proposed education.

Describe a plan for the evaluation, retention and support of the teaching staff that is aligned with the State's approach to incorporating student status and growth data in the evaluation and support of teachers; and present a plan that is reasonably likely to attract and retain effective staff.

Provide a roster of all charter school staff, identifying their proposed positions for each year of the charter. The roster should indicate and identify classroom teachers, any teaching aides or paraprofessionals, any specialty teachers, professional staff and support personnel.

Detail the methodology employed to determine job positions, roles and responsibilities.

Provide job descriptions for each staff member identified on the roster.

Briefly describe the teaching program of typical teachers. Indicate how many hours they will be in the classroom and what other school-related responsibilities they will have outside the classroom (lunch duty, dismissal, advisory group, after-school activities, etc).

Provide information on volunteers or other non-employee individuals who might be engaged in assisting in the day-to-day activities of the public charter school on a full- or part-time basis.

Describe personnel appraisal, evaluation, observation and accountability procedures for all staff on roster.

#### Overall Qualitative Rating for this Application Section:

Meets Standards       Does Not Meet Standards

#### Comments:

#### Clarifying Questions Based on this Application Section:

Completed by:

Date:

## APPENDIX D: QUALITATIVE SCORING TOOL

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<b>C4. Recruitment, Employment and Retention</b>	
<b>Applicant Description:</b>  Describe the standards which you will use to recruit, hire, train and retain highly qualified staff.  Describe the process to utilize the BCPS online applicant process in recruiting all positions.  Describe the plan for utilizing the BCPS' substitute teacher system.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>C5. Payroll</b>	
<b>Applicant Description:</b>  Describe the plan for implementation of payroll processing according to BCPS procedures and negotiated agreements, including pay for supplemental activities.  Describe the human resources plan that will govern salaries, hiring, and dismissal and benefits packages.  Describe the plan to monitor and report employee leave.  Describe the plan to adhere to court-ordered garnishment and levies.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>C6. Certification</b>	
<b>Applicant Description:</b>  Describe how the public charter school will assist BCPS in monitoring and encouraging certificated staff employed at the charter school to maintain and renew certification.  Provide a detailed plan to adhere to the certification process and to fulfill certification requirements. Discuss process for addressing the requirements of conditionally-certified employees.  Describe the charter school’s role in maintaining highly qualified staff at all levels of the public charter school.  Describe how professional development will adhere to BCPS policy and will be offered to the teaching staff.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>C7. Records Management</b>	
<b>Applicant Description:</b>  Describe the charter school’s records maintenance procedures including the process for ensuring that BCPS receives official personnel file documents. Describe procedures for handling employee records on location at the charter school site.  Describe the process to share BCPS employee record changes such as name, address, dependents, marriage, birth and adoption, with the Department of Human Resources.  Describe the plan for working with BCPS to respond to court-ordered subpoenas for employee records.  Provide information on the plan to house charter school’s copy of employee records and state which staff members will have access to these records and the rationale for such access.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> Meets Standards <input type="checkbox"/> Does Not Meet Standards	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>C8. Affiliations and Partnerships</b>	
<b>Applicant Description:</b>  Present a vision and strategy for community involvement that is reasonably likely to further the school’s mission and program.  Describe the scope of community support for the proposed charter school and its organizers.  Provide a list of the organizations that will partner with your school and the focus of these partnerships. Discuss commitments (if any) for partnerships or other relationships with community organizations or individuals that would enrich the learning opportunities of students in your school. Document any commitments with letters of support that identify specific details of the commitments.  Describe the nature of potential partnerships including examples of how community partners will play an integral part in the life of the school and identify specific organizations with which the school is already working, or likely to partner.  Describe the coordination strategies that will integrate partnership activities into the school program and plans to further develop additional community partnerships.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>C9. Waivers Needed to Support the Implementation of the Organizational Plan</b>	
<b>Applicant Description:</b> If requesting a waiver, complete waiver application (refer to appendix H).	
<b>Overall Qualitative Rating for this Application Section:</b> <input type="checkbox"/> Meets Standards <input type="checkbox"/> Does Not Meet Standards	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

## APPENDIX D: QUALITATIVE SCORING TOOL

### Part D. Business Plan

#### D1. Budget

##### **Applicant Description:**

Provide a detailed narrative regarding the school's estimated revenues and expenditures for the proposed term of the charter including the preoperational startup year.

Provide a cash flow analysis for the first fiscal year of operation (July 1–June 30). Include explanation and discussion of key budget assumptions underlying the budget projections and explain how the budget aligns with and supports implementation of the educational program.

If the school anticipates incurring debt for any reason, such as for acquisition of its facility, the budget must address the schedule for debt repayment and the budget discussion should elaborate on the repayment assumptions and plan.

Discuss the school's contingency plans for cash flow challenges, a budget shortfall, lower than expected student enrollment or other financial challenges in the early years of operation.

Provide an operating budget covering each year of the requested charter term that contains revenue projections, expenses and anticipated fund balances. The budget should be based on the projected student enrollment indicated on the cover page of the application. (See APPENDIX A2)

Describe the school's fundraising plan.

Report on the current status of any fundraising efforts, including verification of any fundraising monies reported in the school's start-up or operating budgets.

##### REQUIRED EXHIBITS

- Budget for the proposed charter term (four years)
- Opening year cash flow analysis.
- Pre-Operational Budget **Appendix A3**

##### **Overall Qualitative Rating for this Application Section:**

Meets Standards       Does Not Meet Standards

##### **Comments:**

##### **Clarifying Questions Based on this Application Section:**

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>Completed by:</b>	<b>Date:</b>
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## APPENDIX D: QUALITATIVE SCORING TOOL

### D2. Financial Management

#### Applicant Description:

Demonstrate understanding of the school's financial management obligations.

Present evidence that the school is prepared to adhere to generally accepted accounting practices.

Show evidence that the school will have or has capacity to develop adequate policies and processes for tracking student enrollment and attendance eligibility, eligibility for free- and reduced- priced lunch, special education and limited English proficient enrollment.

Demonstrate preparation to meet its insurance, annual audit, annual financial report and other key financial management obligations.

Submit a separate explanation and discussion of key budget assumptions underlying the budget projections and explain how the budget aligns with and supports implementation of the educational program. If the school anticipates incurring debt for any reason, such as for acquisition of its facility, the budget must address the schedule for debt repayment and the budget discussion should elaborate on the repayment assumptions and plan.

Discuss the school's contingency plans for cash flow challenges: a budget shortfall, lower than expected student enrollment or other financial challenges that may occur in the early years of operation.

Describe the systems and procedures for managing the school's finances and identify the staff position(s) that will be responsible for financial oversight and management.

Describe how the school's finances will be managed and who will be responsible for the protection of financial records.

Describe the method by which accounting records will be maintained.

Describe the financial controls, including an annual audit and regular board review of financial statements, which will be employed to safeguard finances.

The response should address, among other things, the school's plans in the following areas:

1. Provisions for an annual independent financial audit;
2. Development and dissemination of an annual financial report;
3. Internal controls and who is responsible;
4. Documentation of Federal Form 990 (IRS);
5. Providing recommended liability insurance to indemnify the school, its board, staff and teachers against tort claims; and
6. A four-year projected budget.

#### Overall Qualitative Rating for this Application Section:

Meets Standards       Does Not Meet Standards

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>Comments:</b>	
<b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

**D3. Facility**

**Applicant Description:**

Reflect a sound understanding of facilities’ needs. If the facility has not been established, provide the present option for building; specific boundary information (e.g. targeted 10 mile radius) on the planned school location; the facility plan, including spatial requirements (i.e. type of rooms, size and total square footage) to implement the program.

If the program is to expand during the term of the agreement, describe how the facility will be expanded.

Demonstrate knowledge of facilities costs including, as applicable, cost of purchasing, leasing, building or renovating and operating an educational facility that conforms to applicable health, safety and occupancy requirements.

Present evidence to support facilities-related budget assumptions.

Include evidence that the proposed facility will be appropriate and adequate or present a plan for making the proposed facility appropriate and adequate, or present a plan for acquiring a facility that is appropriate and adequate for the school’s educational program, anticipated location, and target population. Describe plans to accommodate student and/or program expansion.

Demonstrate that the school’s plan for acquisition of a facility is financially viable.

Discuss any partnership developments, conversions, or future steps toward acquisition of a facility.

Provide a description of the ownership or lease arrangements, including specific or potential conflict-of-interest and arrangements by which such conflicts will be managed or avoided.

Outline plans for acquiring educational materials, supplies, furniture, technology, and other equipment.

Explain the anticipated costs for the facility, including renovation, rent, utilities and maintenance. Identify, if applicable, any funding sources (other than state and local funding) that will be applied to facilities-related costs.

Describe the back-up facilities plan. What is the alternate plan for facilities if the proposed facility is not available or is determined to be inappropriate for the school’s opening.

**Overall Qualitative Rating for this Application Section:**

Meets Standards       Does Not Meet Standards

**Comments:**

**Clarifying Questions Based on this Application Section:**

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>D4. Food Services</b>	
<b>Applicant Description:</b>  Describe the food services that the charter school will provide to students, including whether the charter school will provide breakfast and/or snack in addition to lunch.  Indicate whether the charter school will participate in the Federal school lunch or school breakfast programs.  Indicate whether the charter school will participate in the local school district’s food service programs and whether food will be prepared on or off site.  Describe the plan to administer the free and reduced lunch program.  Describe plans for food service facilities and equipment that will meet local and state requirements.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>D5. Transportation</b>	
<b>Applicant Description:</b>  If the school intends to contract with the Baltimore County Public Schools or any third party for transportation services, the school must describe the plan and provide evidence of the third party's readiness and terms for providing services. The proposed transportation plan must be compliant with Comar regulation 13a.06.07 "student transportation" and consistent with BCPS policy.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

<b>D6. Insurance</b>	
<b>Applicant Description:</b>  Indicate the types of insurance and the levels of coverage sought. See information provided in Appendix M for insurance requirements in Maryland.	
<b>Overall Qualitative Rating for this Application Section:</b>  <input type="checkbox"/> <b>Meets Standards</b> <input type="checkbox"/> <b>Does Not Meet Standards</b>	
<b>Comments:</b>  <b>Clarifying Questions Based on this Application Section:</b>	
<b>Completed by:</b>	<b>Date:</b>

**APPENDIX D: QUALITATIVE SCORING TOOL**

**Overall Rating Summary**

<b>Section</b>	<b>Meets Standard?</b>
<b>A. Overview</b>	
A1. Executive Summary	<input type="checkbox"/>
A2. Profile of Founding Group	<input type="checkbox"/>
A3. Background Information	<input type="checkbox"/>
<b>B. Educational Plan</b>	
B1. Educational Design	<input type="checkbox"/>
B2. Curriculum and Instruction	<input type="checkbox"/>
B3. Special Student Populations	<input type="checkbox"/>
B4. Student Recruitment, Admission and Enrollment	<input type="checkbox"/>
B5. Code of Student Conduct	<input type="checkbox"/>
B6. Student Health and Safety	<input type="checkbox"/>
B7. School Calendar and Daily Schedule	<input type="checkbox"/>
B8. Assessment	<input type="checkbox"/>
B9. Family Involvement	<input type="checkbox"/>
B10. Waivers for Educational Plan	<input type="checkbox"/>
<b>C. Organizational Plan</b>	
C1. School Governance	<input type="checkbox"/>
C2. Management and Operations	<input type="checkbox"/>
C3. Staffing and Human Resources	<input type="checkbox"/>
C4. Recruitment, Employment and Retention	<input type="checkbox"/>
C5. Payroll	<input type="checkbox"/>
C6. Certification	<input type="checkbox"/>
C7. Records Management	<input type="checkbox"/>
C8. Affiliations and Partnerships	<input type="checkbox"/>
C9. Waivers Needed to Support the Implementation of	<input type="checkbox"/>
<b>D. Business Plan</b>	
D1. Budget	<input type="checkbox"/>
D2. Financial Management	<input type="checkbox"/>
D3. Facility	<input type="checkbox"/>
D4. Food Services	<input type="checkbox"/>
D5. Transportation	<input type="checkbox"/>
D6. Insurance	<input type="checkbox"/>

**Overall Qualitative Rating of this Application:**

**APPENDIX D: QUALITATIVE SCORING TOOL**

<input type="checkbox"/> Meets Standards <input type="checkbox"/>	
 <p><b>BCPS</b> <b>charter</b> <b>schools</b></p>	<b>Does Not</b>
<b>Meet Standards</b>	
<b>Final Qualitative Rating Based on the Following Criteria:</b>	
<b>Completed by:</b>	<b>Date:</b>

## APPENDIX C - APPLICATION FORMS AND DOCUMENTS CHECKLIST

All applicants are required to complete and submit a full application as outlined in the Charter Schools Applications Procedures (page 13, step 2: The Application Development Process). The minimum requirements for submission of a complete application package are as follows:

- Cover Sheet
- Table of Contents

### Part A: Overview

- Executive Summary
- Profile of Founding Group
- Background Information

### Part B: Education Plan

- Educational Design and Student Information
- Curriculum and Instruction
- Special Student Populations
- Student Recruitment, Admission and Enrollment
- Code of Student Conduct
- Student Health and Safety
- School Calendar and Daily Schedule
- Assessment
- Family Involvement
- Waivers for Educational Plan

### Part C: Organizational Plan

- School Governance
- Management and Operations:
  - Organizational Structure
  - Education Service Providers
  - Resource Management and Evaluation
  - Student Records and Record Management
  - Charter School Procedures
- Staffing and Human Resources
- Recruitment, Employment and Retention
- Payroll
- Certification
- Records Management
- Affiliations and Partnerships
  - Waivers needed to support the implementation of the organizational plan

## APPENDIX C - APPLICATION FORMS AND DOCUMENTS CHECKLIST

### Part D: Business Plan

- Budget
- Financial Management
- Facility
- Food Services
- Transportation
- Insurance
  
- Appendices
  - A3: Pre-Operational Budget
  - B: Public Charter School Application Cover Sheet
  - C: Public Charter School Application Forms and Documents Checklist
  - E: Compliance Assurances
  - F: Public Charter School Conflict of Interest Form
  - G: Affidavit, Disclosure, and Consent for Background and Credit Check
  - H: Public Charter School Waiver Application/COMAR
  - I: Sample List of Facilities Requirements
  - J: Public Charter School Leasing Requirements
  - K: Public Charter School Construction Plans

For more information on application submission, please refer to the *Application Development Process*, section of the Charter School Application Procedures.

### FEDERAL GRANTS

- The applicant is hereby notifying the authorizer of the intent to apply for the Charter School Program (CSP) sub-grant. The proposal for the grant (which includes this application as a main component of the proposal) will be submitted to the Maryland State Department of Education on: \_\_\_\_\_.
- The applicant will not apply for the Charter School Program sub-grant.

**APPENDIX B - PUBLIC CHARTER SCHOOL APPLICATION COVER SHEET**

Name of Proposed Public Charter School:	
Name of not-for-profit 501(c)(3) organization that will hold the charter:	
Primary Contact Person:	
Mailing Address:	
Telephone (primary):	Telephone (secondary):
Education Service Provider or Partner Organization (if applicable):	
Physical Address of School (if known):	
Projected Opening Date (school year: e.g. fall of 20 - -):	
Proposed Charter Term (no fewer than 3 and no more than 5 years):	

**Enrollment Projections (\*if applicable)**

SCHOOL YEARS:	GRADE LEVELS	ENROLLMENT PER GRADE LEVELS
Yr. 1- 20__ - __		
Yr. 2		
Yr. 3		
Yr. 4*		
Yr. 5*		
		<b>TOTAL SCHOOL ENROLLMENT =</b>

## APPENDIX B - PUBLIC CHARTER SCHOOL APPLICATION COVER SHEET

**School Description:** Provide a brief description (a shortened version of the executive summary) of the proposed school that includes the name, the mission, grades served and other pertinent information. This description will be used by the authorizer to provide information to the public about the approved charter schools.

### Application Certification

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

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## APPENDIX E - COMPLIANCE ASSURANCES

### **Admission Procedures (Md. Education Code Ann. § 9-102)**

The Public Charter School is subject to all federal and state laws prohibiting discrimination. Admission is not limited on the basis of ancestry/national origin, color, disability, gender, gender identity/expression, race, religion, sex, sexual orientation proficiency in the English language or athletic ability. There are no tuition/fees charged for attending \_\_\_\_\_ Public Charter School.

\_\_\_\_\_ Public Charter School will admit all eligible pupils who submit a timely application. A charter school shall give enrollment preference to pupils returning to the charter school in the second or any subsequent year of its operation and to siblings of pupils already enrolled in the charter school. If, by the application deadline, the number of applications exceeds the capacity of a program, class, grade level or building, all applications for that program, class, grade level or building will be selected for the available slots on a lottery basis, except that preference shall be given to siblings of a pupil. After the application deadline, pupils for any remaining slots or from a waiting list will be accepted in chronological order.

### **Nonsectarian Statement (Md. Education Code Ann. § 9-104)**

\_\_\_\_\_ Public Charter School is nonsectarian in all of its programs, admission policies, employment practices and all other operations.

### **Agreement to Participate in Training and Professional Development**

The Operators of \_\_\_\_\_ Public Charter School shall be informed of applicable training and professional development as set forth by the Baltimore County Public Schools policies and administrative procedures (Md. Education Code Ann. § 9-107(c)).

### **Special Education/Exceptional Student Services Training**

The Operators of \_\_\_\_\_ Public Charter School will take Special Education training and professional development approved by the Baltimore County Public Schools subsequent to signing the contract, but prior to the first day of instruction (Md. Education Code Ann. § 9-107(c)[(d)]).

### **Agreement to Comply with Audit Requirements**

The Operators of \_\_\_\_\_ Public Charter School agree to comply with audit requirements as set forth by the Board of Education.

### **Agreement to Comply with Maryland Comprehensive Assessment Program.**

The Operators of \_\_\_\_\_ Public Charter School agree to comply with the Maryland Comprehensive Assessment Program.

\_\_\_\_\_  
Authorized Agent (please print)

\_\_\_\_\_  
Authorized Agent Signature

\_\_\_\_\_  
Date

# APPENDIX H - PUBLIC CHARTER SCHOOL WAIVER APPLICATION

Date: \_\_\_\_\_

A. Applicant: \_\_\_\_\_

B. Request Waiver for:

Maryland State Board of Education Regulation: \_\_\_\_\_

Board of Education of Baltimore County Policy: \_\_\_\_\_

C. Time period for which waiver is requested: \_\_\_\_\_

D. Proposed change:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

E. Information/data that supports the need for this proposal:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

F. Describe the desired outcome and how the requested waiver will facilitate its attainment:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

G. Determine stakeholders who will be affected by this proposal and the impact (both pro and con) for each of these stakeholders.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

H. Describe how the above stakeholders will be involved in the decision-making process.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# APPENDIX H - PUBLIC CHARTER SCHOOL WAIVER APPLICATION

## CODE OF MARYLAND REGULATIONS (COMAR), TITLE 13A

### **COMAR 13A.01.01.02-1, Waivers from Regulations.**

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- A. Authority. Upon a demonstration of good cause, substantial compliance, or comparable effort by an educational institution or program seeking a waiver, the State Board of Education may grant waivers from its regulations.
- B. Term.
  - (1) The term of a waiver may not exceed 3 years.
  - (2) Requests to renew waivers for additional 3-year terms may be filed with the State Superintendent of Schools.
- C. Procedure.
  - (1) The head of an educational institution or program, including an institution of higher education, or the local superintendent of schools on behalf of a school or school system, shall file a waiver request with the State Superintendent of Schools. The request shall include a description of the desired outcome and an explanation of why the waiver is necessary and justifiable under the circumstances.
  - (2) The State Superintendent of Schools shall submit to the State Board of Education each waiver request within 45 calendar days of its receipt with a recommendation for either granting or denying the waiver, specifying its term, and providing written justification for any recommended denial.
  - (3) The State Board of Education shall render a decision at its next regularly scheduled meeting. The decision of the State Board of Education on a waiver request is final.

### **COMAR 13A.08.02.12, Waivers.**

---

- A. Subject to the limitations in this regulation, a parent or guardian of a student or an eligible student may waive any of his or her rights under '438 of the Act or this chapter. A waiver may not be valid unless in writing and signed by the parent, guardian, or eligible student, as appropriate.
- B. A local school system or educational institution may not require that a parent or guardian of a student, or an eligible student, waive his or her rights under this regulation. This section does not preclude a local school system or educational institution from requesting a waiver.
- C. An individual who is an applicant for admission to an institution of postsecondary education or employment may waive the individual's right to inspect and review confidential letters and confidential statements of recommendation respecting admission to an educational institution, application for employment, or the receipt of an honorary recognition.
- D. A waiver under 'C of this regulation may apply to confidential letters and statements only if:

## APPENDIX H - PUBLIC CHARTER SCHOOL WAIVER APPLICATION

- (1) The applicant is, upon request, notified of the names of all individuals providing the letters or statements;
  - (2) The letters or statements are used only for the purpose for which they were originally intended; and
  - (3) This waiver is not required by the local school system or educational institution as a condition of admission, employment, or granting of an honor or receipt of any other service or benefit from the local school system or educational institution.
- E. A waiver under C of this regulation shall be executed by the individual, regardless of age, rather than by the parent or guardian of the individual.
- F. A waiver under this regulation may be made with respect to specified classes of student records, and persons or institutions.
- G. Revocation of Waiver.
- (1) A waiver under this regulation may be revoked with respect to any actions occurring after the revocation.
  - (2) A revocation under this regulation shall be in writing.
  - (3) If a parent or guardian of a student executes a waiver under this regulation, that waiver may be revoked by the student at any time after the student becomes an eligible student.

### **COMAR 13A.12.01.14, Waivers and Special Certification Provisions.**

---

- A. Waiver of Certification Requirements. Except for teacher certification tests, the State Superintendent of Schools has the authority to waive the specific requirements for a certificate in an individual case if the State Superintendent of Schools determines, after thorough investigation, that the applicant's preparation or experience, or both, are adequate to justify a waiver.
- B. Special Allowances. Renewal requirements for any professionally certificated employee may be waived without regard to Regulation .11 of this chapter if the:
- (1) Renewal is recommended by the local superintendent of schools; and
  - (2) Professionally certificated employee is:
    - (a) 55 years old or older; or
    - (b) Employed for at least 25 years in public school service or approved nonpublic school service.
- C. Emergency Certificate.
- (1) During a state of emergency, the State Superintendent may authorize the issuance of an emergency certificate to an individual employed in a local school system, State institution, or nonpublic school approved under COMAR 13A.09.10.
  - (2) Conditions. The emergency certificate may only be issued during a state of emergency and:
    - (a) Is valid for 6 months from the date that the state of emergency is declared over;
    - (b) Is nonrenewable; and
    - (c) May only be issued to an individual employed in a local school system,

## APPENDIX H - PUBLIC CHARTER SCHOOL WAIVER APPLICATION

- State institution, or nonpublic school approved under COMAR 13A.09.10.
- (3) Applicant. The emergency certificate may be issued to those applicants who are employed with a local school system, State institution, or nonpublic school approved under [COMAR 13A.09.10](#) in a position that requires certification under COMAR Regulation .03B of this chapter, if the applicant:
- (a) Is enrolled, in good standing, in a Maryland approved educator preparation program and has completed all program requirements with the exception of the clinical experience and the certification assessment or assessments;  
or
  - (b) Holds a conditional degree or conditional nondegree certificate and has completed all of the requirements on their Maryland State Department of Education evaluation with the exception of the required experience and certification assessment or assessments.

## APPENDIX F - CONFLICT OF INTEREST FORM

**(THIS FORM MUST BE COMPLETED BY EACH MEMBER OF THE FOUNDING BOARD  
AND THE BOARD OF DIRECTORS.)**

The intent of this form is to identify any potential conflicts of interest that may be created in the event the charter school application is approved. Members of the Founding Board and the Board of Directors are asked to complete this form based on knowledge of affiliations at the time of submittal of the application. If a conflict of interest concern is identified, the Board reserves the right to refer the matter to its Ethics Panel for resolution prior to the opening of the school.

**Instructions:** If you answer “yes” to any of the following questions, please provide an explanation on a separate sheet of paper. Please label explanations with the number of the corresponding question.

		YES	NO
1.	Do or will you or your spouse have any contractual agreements with the proposed public charter school?		
2.	Do or will you, your spouse or any member of your immediate family have any ownership interest in any educational service provider (ESP) or any other company contracting with the proposed public charter school?		
3.	Did or will you or your spouse lease or sell property to the proposed public charter school?		
4.	Did or will you or your spouse sell any supplies, materials, equipment or other personal property to the proposed public charter school?		
5.	Have you or your spouse guaranteed any loans for the proposed public charter school or loaned it any money?		
6.	Are or will you, your spouse or any member of your immediate family be employed by the proposed public charter school, its ESP or other contractors?		
7.	Did you or your spouse provide any start up funds to the proposed public charter school?		
8.	Did or do you or your spouse, or other member of your immediate family, have ownership interest, directly or indirectly, in any corporation, partnership, association or other legal entity which would answer “yes” to any of the questions 1-7?		
9.	Does any other board, group or corporation believe it has a right to control or have input on votes you will cast as a founding member or member of the Board of Directors?		

## APPENDIX F - CONFLICT OF INTEREST FORM

10.	Do you currently serve as a member of the board of any public charter school?		
11.	Do you currently serve as a public official?		
12.	Have you, your spouse or any member of your immediate family applied to establish or participated in the establishment of a public charter school?		
13.	To the best of your knowledge, are there situations not described above that may give the appearance of a conflict of interest between you and the proposed public charter school, or which would make it difficult for you to discharge your duties or exercise your judgment independently on behalf of the proposed public charter school?		

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

## APPENDIX G - AFFIDAVIT, DISCLOSURE, AND CONSENT FOR BACKGROUND AND CREDIT CHECK

**Instructions:** This Affidavit must be completed, signed by each member of the Founding Board and the Board of Directors and returned with the application.

Name \_\_\_\_\_ Social Sec. No. \_\_\_\_\_

Address \_\_\_\_\_  
Street City State Zip

Phone \_\_\_\_\_ Date of Birth \_\_\_\_\_ Place of Birth \_\_\_\_\_

1. Have you ever been convicted or pled “no contest” for any violation of law other than minor traffic offenses? If either event has occurred, you must answer YES. If the conviction has been set aside, the charges must be disclosed. Please give details on a separate signed, notarized and dated sheet.	<b>YES</b> <b>NO</b>
2. Have you ever been convicted of, admitted committing or are you awaiting trial on any of the following criminal offenses in this state or similar offenses in another jurisdiction: (1) Sexual abuse of minor, (2) Incest, (3) First or second degree murder, (4) Kidnapping, (5) Arson, (6) Sexual assault, (7) Sexual exploitation of a minor, (8) Contributing to the delinquency of a minor, (9) Commercial sexual exploitation of a minor, (10) Felony offenses involving distribution of marijuana or dangerous or narcotic drugs, (11) Felony offenses involving the possession or use of marijuana or dangerous or narcotic drugs, (12) Misdemeanor offenses involving the possession or use of marijuana or dangerous drugs, (13) Burglary in the first degree, (14) Burglary in the second or third degree, (15) Aggravated or armed robbery, (16) Robbery, (17) A dangerous crime against children (18) Child abuse, (19) Sexual conduct with a minor, (20) Molestation of a child, (21) Manslaughter, (22) Aggravated assault, (23) Assault, or (24) Exploitation of minors involving drug offenses? If YES, submit certified court record and details of incident(s), signed, notarized and dated.	<b>YES</b> <b>NO</b>
3. Have you ever declared bankruptcy? If yes, provide details on a separate signed, notarized and dated sheet.	<b>YES</b> <b>NO</b>

With signature below, permission is hereby granted to complete the background and credit check of the individual above for \_\_\_\_\_ Public Charter School.

I DO SOLEMNLY SWEAR OR AFFIRM THAT THE FOREGOING INFORMATION PROVIDED BY ME FOR RECEIPT OF PUBLIC CHARTER SCHOOL STATUS IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE. SHOULD ANY PART OF THE INFORMATION HEREIN PROVIDED PROVE TO BE FALSE, I RECOGNIZE THAT IT SHALL BE JUST CAUSE FOR DENIAL OR REVOCATION OF PUBLIC CHARTER STATUS OF \_\_\_\_\_ PUBLIC CHARTER SCHOOL BY THE BOARD OF EDUCATION OF BALTIMORE COUNTY.

Founding Board and the Board of Directors’ Signatures:

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

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

**APPENDIX G - AFFIDAVIT, DISCLOSURE, AND CONSENT FOR  
BACKGROUND AND CREDIT CHECK**

\_\_\_\_\_  
**SIGNATURE** **DATE**

## **APPENDIX I – FACILITIES REQUIREMENTS**

### **SAMPLE LIST OF FACILITIES REQUIREMENTS FOR CHARTER SCHOOLS\***

- Name and address of planning consultant for school design in the proposed facility.
- Educational specifications for proposed facilities approved by the Interagency Commission On School Construction.
- Construction documents for the build out or construction of the proposed facility
- Occupancy permit from County with required approvals including, but not limited to:
  - Current Building Code
  - Fire marshal/life safety code
  - Americans with Disabilities Act (ADA) accessibility
  - County health department code
  - County electrical building code
  - Environmental compliance including:
    - Asbestos Hazard Emergency Response Act (AHERA)
    - Lead Contamination control Act
- Any other county requirements.
- Any state charter school requirements not on this list.
- Updated Pressure Vessel Inspections and Certificates, if needed.
- Technology to ensure access to school system main server and software programs necessary for administrator, secretary, and Special Education staff, at minimum.
- Communication system so that teachers can communicate with main office from classrooms for emergency announcements as required in Negotiated Agreement.
- BCPS approved technology that coordinates/ communicates with BCPS security camera monitoring systems.
- BCPS approved technology at the cafeteria serving line that coordinates/communicate with BCPS student financial account information system.
- Approval letter from the landlord giving approval of the proposed tenant improvements (as required).
- BCPS approved kitchen equipment plan.
- BCPS approved operations/maintenance program for building sanitation and maintenance.

## **APPENDIX I – FACILITIES REQUIREMENTS**

- Comply with any physical requirements as dictated by bargaining units such as TABCO, OPE, etc.
- Assurance that mechanical systems provide adequate ventilation in occupied areas.
- Traffic flow plan to ensure safety of charter school students, families, and staff while minimizing impact on surrounding community.
- Prior to release of funds for rent payment:
  - Copy of lease agreement.
  - Provisions in agreement that protect school system.
  - Copy of insurance policy that provides protection for school system and charter school.

\*Based on list developed by Baltimore County Public Schools, January 2021

## APPENDIX J – LEASING REQUIREMENTS

### Public Charter School Leasing Requirements

**Title:** Acquisition of Real Property by Lease for Use as Public School

**Authority:** Education Article § 4-115(b) Annotated Code of Maryland

**Purpose:** The following requirements shall be followed by local school systems to obtain the State Superintendent's approval of certain school real property leases.

**Applies to:** Rental of private or publicly-owned real property by a school system or by a charter school for use as a public school building.

**Exceptions:** Renewals of leases previously approved by the State Superintendent do not require approval.

#### Procedures:

1. Requests for approval shall be in writing from the local school system or, for charter schools, from the local school system chartering authority.
2. The local school system shall inspect and approve the site for use as a public school prior to submission of the request for approval to the State Superintendent.
3. The local school system or charter school shall obtain all approvals required by the fire marshal and other State and local agencies prior to submission of the request for approval to the State Superintendent.
4. The Maryland State Department of Education may inspect the site and may require review by other State agencies as a part of its evaluation of the lease.
5. The State Superintendent shall approve or disapprove all applicable leases in writing.
6. If the State Superintendent disapproves a lease, the Superintendent shall state the reasons for disapproval in writing.
7. Requests for approval shall be addressed to:

Chief, School Facilities Branch  
Maryland State Dept. of Education  
200 West Baltimore Street  
Baltimore, Maryland 21201

## APPENDIX J – LEASING REQUIREMENTS

### Information to be submitted:

1. Formal request for approval of lease including:
  - a. Description of school (enrollment, grades, etc.)
  - b. Justification for Lease
  - c. Local Board of Education site approval (actions taken, dates)
  
2. Copy of lease including:
  - a. Name and addresses of parties to the lease
  - b. Location of property to be leased, including map if available
  - c. Description of property to be leased, including floor plans if available
  - d. Description of school uses in leased property
  - e. Duration of lease
  - f. Cost of lease
  - g. Any special conditions in lease

### For further information please contact:

Chief, School Facilities Branch  
Maryland State Department of Education  
200 West Baltimore Street  
Baltimore, MD 21201  
Phone: 410-767-0097

# APPENDIX H - PUBLIC CHARTER SCHOOL WAIVER APPLICATION

Date: \_\_\_\_\_

A. Applicant: \_\_\_\_\_

B. Request Waiver for:

Maryland State Board of Education Regulation: \_\_\_\_\_

Board of Education of Baltimore County Policy: \_\_\_\_\_

C. Time period for which waiver is requested: \_\_\_\_\_

D. Proposed change:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

E. Information/data that supports the need for this proposal:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

F. Describe the desired outcome and how the requested waiver will facilitate its attainment:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

G. Determine stakeholders who will be affected by this proposal and the impact (both pro and con) for each of these stakeholders.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

H. Describe how the above stakeholders will be involved in the decision-making process.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# APPENDIX H - PUBLIC CHARTER SCHOOL WAIVER APPLICATION

## CODE OF MARYLAND REGULATIONS (COMAR), TITLE 13A

### COMAR 13A.01.01.02-1, Waivers from Regulations.

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- A. Authority. Upon a demonstration of good cause, substantial compliance, or comparable effort by an educational institution or program seeking a waiver, the State Board of Education may grant waivers from its regulations.
- B. Term.
  - (1) The term of a waiver may not exceed 3 years.
  - (2) Requests to renew waivers for additional 3-year terms may be filed with the State Superintendent of Schools.
- C. Procedure.
  - (1) The head of an educational institution or program, including an institution of higher education, or the local superintendent of schools on behalf of a school or school system, shall file a waiver request with the State Superintendent of Schools. The request shall include a description of the desired outcome and an explanation of why the waiver is necessary and justifiable under the circumstances.
  - (2) The State Superintendent of Schools shall submit to the State Board of Education each waiver request within 45 calendar days of its receipt with a recommendation for either granting or denying the waiver, specifying its term, and providing written justification for any recommended denial.
  - (3) The State Board of Education shall render a decision at its next regularly scheduled meeting. The decision of the State Board of Education on a waiver request is final.

### COMAR 13A.08.02.12, Waivers.

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- A. Subject to the limitations in this regulation, a parent or guardian of a student or an eligible student may waive any of his or her rights under '438 of the Act or this chapter. A waiver may not be valid unless in writing and signed by the parent, guardian, or eligible student, as appropriate.
- B. A local school system or educational institution may not require that a parent or guardian of a student, or an eligible student, waive his or her rights under this regulation. This section does not preclude a local school system or educational institution from requesting a waiver.
- C. An individual who is an applicant for admission to an institution of postsecondary education or employment may waive the individual's right to inspect and review confidential letters and confidential statements of recommendation respecting admission to an educational institution, application for employment, or the receipt of an honorary recognition.
- D. A waiver under 'C of this regulation may apply to confidential letters and statements only if:

## APPENDIX H - PUBLIC CHARTER SCHOOL WAIVER APPLICATION

- (1) The applicant is, upon request, notified of the names of all individuals providing the letters or statements;
  - (2) The letters or statements are used only for the purpose for which they were originally intended; and
  - (3) This waiver is not required by the local school system or educational institution as a condition of admission, employment, or granting of an honor or receipt of any other service or benefit from the local school system or educational institution.
- E. A waiver under C of this regulation shall be executed by the individual, regardless of age, rather than by the parent or guardian of the individual.
- F. A waiver under this regulation may be made with respect to specified classes of student records, and persons or institutions.
- G. Revocation of Waiver.
- (1) A waiver under this regulation may be revoked with respect to any actions occurring after the revocation.
  - (2) A revocation under this regulation shall be in writing.
  - (3) If a parent or guardian of a student executes a waiver under this regulation, that waiver may be revoked by the student at any time after the student becomes an eligible student.

### **COMAR 13A.12.01.14, Waivers and Special Certification Provisions.**

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- A. Waiver of Certification Requirements. Except for teacher certification tests, the State Superintendent of Schools has the authority to waive the specific requirements for a certificate in an individual case if the State Superintendent of Schools determines, after thorough investigation, that the applicant's preparation or experience, or both, are adequate to justify a waiver.
- B. Special Allowances. Renewal requirements for any professionally certificated employee may be waived without regard to Regulation .11 of this chapter if the:
- (1) Renewal is recommended by the local superintendent of schools; and
  - (2) Professionally certificated employee is:
    - (a) 55 years old or older; or
    - (b) Employed for at least 25 years in public school service or approved nonpublic school service.
- C. Emergency Certificate.
- (1) During a state of emergency, the State Superintendent may authorize the issuance of an emergency certificate to an individual employed in a local school system, State institution, or nonpublic school approved under COMAR 13A.09.10.
  - (2) Conditions. The emergency certificate may only be issued during a state of emergency and:
    - (a) Is valid for 6 months from the date that the state of emergency is declared over;
    - (b) Is nonrenewable; and
    - (c) May only be issued to an individual employed in a local school system,

## APPENDIX H - PUBLIC CHARTER SCHOOL WAIVER APPLICATION

- State institution, or nonpublic school approved under COMAR 13A.09.10.
- (3) Applicant. The emergency certificate may be issued to those applicants who are employed with a local school system, State institution, or nonpublic school approved under [COMAR 13A.09.10](#) in a position that requires certification under COMAR Regulation .03B of this chapter, if the applicant:
- (a) Is enrolled, in good standing, in a Maryland approved educator preparation program and has completed all program requirements with the exception of the clinical experience and the certification assessment or assessments;  
or
  - (b) Holds a conditional degree or conditional nondegree certificate and has completed all of the requirements on their Maryland State Department of Education evaluation with the exception of the required experience and certification assessment or assessments.

## APPENDIX J – LEASING REQUIREMENTS

### Public Charter School Leasing Requirements

**Title:** Acquisition of Real Property by Lease for Use as Public School

**Authority:** Education Article § 4-115(b) Annotated Code of Maryland

**Purpose:** The following requirements shall be followed by local school systems to obtain the State Superintendent's approval of certain school real property leases.

**Applies to:** Rental of private or publicly-owned real property by a school system or by a charter school for use as a public school building.

**Exceptions:** Renewals of leases previously approved by the State Superintendent do not require approval.

#### Procedures:

1. Requests for approval shall be in writing from the local school system or, for charter schools, from the local school system chartering authority.
2. The local school system shall inspect and approve the site for use as a public school prior to submission of the request for approval to the State Superintendent.
3. The local school system or charter school shall obtain all approvals required by the fire marshal and other State and local agencies prior to submission of the request for approval to the State Superintendent.
4. The Maryland State Department of Education may inspect the site and may require review by other State agencies as a part of its evaluation of the lease.
5. The State Superintendent shall approve or disapprove all applicable leases in writing.
6. If the State Superintendent disapproves a lease, the Superintendent shall state the reasons for disapproval in writing.
7. Requests for approval shall be addressed to:

Chief, School Facilities Branch  
Maryland State Dept. of Education  
200 West Baltimore Street  
Baltimore, Maryland 21201

## APPENDIX J – LEASING REQUIREMENTS

### Information to be submitted:

1. Formal request for approval of lease including:
  - a. Description of school (enrollment, grades, etc.)
  - b. Justification for Lease
  - c. Local Board of Education site approval (actions taken, dates)
  
2. Copy of lease including:
  - a. Name and addresses of parties to the lease
  - b. Location of property to be leased, including map if available
  - c. Description of property to be leased, including floor plans if available
  - d. Description of school uses in leased property
  - e. Duration of lease
  - f. Cost of lease
  - g. Any special conditions in lease

### For further information please contact:

Chief, School Facilities Branch  
Maryland State Department of Education  
200 West Baltimore Street  
Baltimore, MD 21201  
Phone: 410-767-0097

## APPENDIX M - EARLY CHILDHOOD PROGRAMS - AGE OF ENTRY CHART

The following chart reflects the cut-off dates and corresponding dates of birth children entering Baltimore County Public Schools' Preschool-3, Prekindergarten, Kindergarten and first grade classes. The chart may be used to assist schools when registering children.

School Year	Program	Cutoff date	Date of Birth
2019-20	Preschool 3	3 years old by Sept. 1	DOB 9/2/15 – 9/1/16
2019-20	Prekindergarten	4 years old by Sept. 1	DOB 9/2/14 – 9/1/15
2019-20	Kindergarten	5 years old by Sept. 1	DOB 9/2/13 – 9/1/14
2019-20	First Grade	6 years old by Sept. 1	DOB 9/2/12 – 9/1/13
2020-21	Preschool 3	3 years old by Sept. 1	DOB 9/2/16 – 9/1/17
2020-21	Prekindergarten	4 years old by Sept. 1	DOB 9/2/15 – 9/1/16
2020-21	Kindergarten	5 years old by Sept. 1	DOB 9/2/14 – 9/1/15
2020-21	First Grade	6 years old by Sept. 1	DOB 9/2/13 – 9/1/14
2021-22	Preschool 3	3 years old by Sept. 1	DOB 9/2/17 – 9/1/18
2021-22	Prekindergarten	4 years old by Sept. 1	DOB 9/2/16 – 9/1/17
2021-22	Kindergarten	5 years old by Sept. 1	DOB 9/2/15 – 9/1/16
2021-22	First Grade	6 years old by Sept. 1	DOB 9/2/14 – 9/1/15
2022-23	Preschool 3	3 years old by Sept. 1	DOB 9/2/18 – 9/1/19
2022-23	Prekindergarten	4 years old by Sept. 1	DOB 9/2/17 – 9/1/18
2022-23	Kindergarten	5 years old by Sept. 1	DOB 9/2/16 – 9/1/17
2022-23	First Grade	6 years old by Sept. 1	DOB 9/2/15 – 9/1/16
2023-24	Preschool 3	3 years old by Sept. 1	DOB 9/2/19 – 9/1/20
2023-24	Prekindergarten	4 years old by Sept. 1	DOB 9/2/18 – 9/1/19
2023-24	Kindergarten	5 years old by Sept. 1	DOB 9/2/17 – 9/1/18
2023-24	First Grade	6 years old by Sept. 1	DOB 9/2/16 – 9/1/17
2024-25	Preschool 3	3 years old by Sept. 1	DOB 9/2/20 – 9/1/21
2024-25	Prekindergarten	4 years old by Sept. 1	DOB 9/2/19 – 9/1/20
2024-25	Kindergarten	5 years old by Sept. 1	DOB 9/2/18 – 9/1/19
2024-25	First Grade	6 years old by Sept. 1	DOB 9/2/17 – 9/1/18

## APPENDIX L – INSURANCE REQUIREMENTS

### **PUBLIC CHARTER SCHOOL INSURANCE REQUIREMENTS**

#### **Insurance**

The Charter School shall maintain adequate and current policies that address the following areas:

- Comprehensive or Commercial General Liability
- Worker's Compensation
- Property Insurance (for leased facilities) to address business interruption and casualty needs including fire and other hazards with replacement costs coverage for all assets listed in the Charter School's property inventory and consumables
- Comprehensive or Business Automobile Liability; and
- Crime Insurance
- Educators Legal Liability (errors & omissions)
- Catastrophic Student Accident Insurance
- Business Income and Extra Expense Insurance

All required insurance coverages must be underwritten by insurers allowed to do business in the State of Maryland and acceptable to the Board. The insurers must also have a policyholders' rating of "A-" or better, and a financial size of "Class VII" or better in the latest evaluation by A. M. Best Company, unless the Office of Employee Absence and Risk Management grants specific approval for an exception. The Board hereby grants specific approval for the acquisition of workers compensation and employers liability insurance from the Injured Workers Insurance Fund of Maryland.

Certificates of Insurance listed above must be provided to Baltimore County Public Schools as a requirement of this agreement. Certificates should be mailed to: Risk Supervisor, Office of Employee Absence and Risk Management, Baltimore County Public Schools, 6901 Charles Street, Building B, Towson, Maryland 21204.

Insurance as required hereunder shall be in force throughout the term of the Charter School's operations. Original certificates signed by authorized representatives of the insurers or, at the Baltimore County Public Schools' Office of Employee Absence and Risk Management request, certified copies of insurance policies, evidencing that the required insurance is in effect, shall be maintained with the Board throughout the term of the Charter School's operations. The certificates of insurance will state such insurance is in force and cannot be cancelled or released except upon thirty (30) days prior written notice to the Board of Education of Baltimore County.

## APPENDIX L – INSURANCE REQUIREMENTS

### Coverage

For purposes of the foregoing requirement, the following coverage shall be deemed “adequate:”

- A. Workers’ Compensation insurance to cover minimum statutory limit obligations imposed by federal and state statutes having jurisdiction over the Charter School’s employees, as well as employers’ liability insurance with a minimum limit of \$100,000 per each accident and employee and \$500,000 policy limit for bodily injury by disease.
- B. Comprehensive General Liability insurance with a minimum combined single limit of \$1,000,000 each occurrence, \$1,000,000 personal and advertising injury, \$1,000,000 general aggregate, and \$1,000,000 products/completed operations aggregate.

This insurance shall include coverage for all of the following:

- Liability arising from premises and operations;
- Liability arising from the actions of independent contractors;
- Contractual liability including protection for the Charter School from bodily injury and property damage claims arising out of liability assumed under contract;
- Liability arising from athletic participation (Any athletic participation exclusion shall be deleted.);
- Liability arising from childcare (Any specific childcare exclusion shall be deleted.);
- Liability arising from field trips or other off-premises activities (Any specific field trip exclusion or designated premises endorsement shall be deleted.); and
- Liability arising from sexual and/or physical abuse with minimum sublimits of \$250,000 per occurrence, \$250,000 annual aggregate.

**The Board and Board's elected and appointed officials, officers, directors, trustees, consultants, agents and employees shall be named as additional insureds under the commercial general liability and umbrella excess (or excess liability) coverages, and each certificate of insurance, or each certified policy if requested, must so state this.**

## APPENDIX L – INSURANCE REQUIREMENTS

- C. Comprehensive or Business Automobile Liability insurance with a combined single limit for bodily injury and property damage or not less than \$1,000,000 each occurrence with respect to the school's owned, hired or non-owned vehicles, assigned to or used in performance of the services offered by the school.
- D. The Charter School must obtain property insurance for owned buildings being used by the charter school to fulfill the purposes of this contract and property insurance, on a replacement cost basis, for any contents purchased by the Charter School with state or federal funds. The property insurance obtained by the Charter School shall provide the County Board with the ability to file a claim for any loss of property purchased with state or federal funds. The Board shall be named as loss payee under the Charter School's property insurance with respect to that property in which the Board has a financial interest, while such property is located in or on the premises of the Charter School or is otherwise in the care, custody or control of the Charter School.
- E. Educators Legal (Errors and Omissions) Liability Insurance conforming to the following requirements:
- Errors and Omissions Liability Insurance shall cover the Charter School for those sources of liability arising out of the rendering or failure to render professional services in the performance of this agreement, including all provisions regarding financial management and indemnification.
  - The minimum limits to be maintained by the Charter School shall be no less than \$3,000,000 per claim/annual aggregate.

This insurance shall include coverage for all of the following:

- Any professional staff or other employees of the Board assigned to work at or participate in the operations of the Charter School must be included as insureds.
- This policy must be modified by manuscript endorsement to specifically apply on a primary basis for these Board employees in relation to the Board's school board legal liability coverage.

## APPENDIX L – INSURANCE REQUIREMENTS

- F. Umbrella excess liability or excess liability insurance with minimums of \$2,000,000 per occurrence, \$2,000,000 aggregate for other than products/completed operations and auto liability, and products/completed operations aggregate, and include all of the coverage required on the Commercial general liability, Business auto liability and Employers liability.

**The Board and Board's elected and appointed officials, officers, directors, trustees, consultants, agents and employees shall be named as additional insureds under the commercial general liability and umbrella excess (or excess liability) coverages, and each certificate of insurance, or each certified policy if requested, must so state this.**

- G. Crime Insurance with minimum limits of \$500,000 for each loss due to employee dishonesty, \$100,000 for each loss due to forgery or alteration, theft, disappearance or destruction (money and securities).

This insurance shall include coverage for all of the following:

- The definition of employee shall include students and volunteers, including fund solicitors.
  - Named insured shall include any employee welfare, pension or benefit plan sponsored and approved by Charter School.
  - Compliance with ERISA of 1974 requirements with respect to: defining employee to include trustees, officers, employees, administrators or managers (except independent contractors) of any of Charter School's employee welfare, pension or benefit plans, and the named insured's directors or trustees while handling funds or other property of such plans, commingling of funds; deductible applicability; and when benefit plans are jointly insured with other entities, where applicable (Use CR 1027 or equivalent form(s)).
  - The Board and the State of Maryland as their interest may appear are to be named as loss payees under the employee dishonesty coverage as respects property in which the Board or the State of Maryland has a financial interest.
- H. Catastrophic Student Accident Insurance to cover injury to all enrolled students who participate in intramural or interscholastic sports, gym classes, and non-sport extra-curricular activities including band members, cheerleaders, majorettes, student coaches, student trainers and student managers with a maximum deductible of \$25,000 and minimum limits of: \$1,000,000 for accident medical expense,

## APPENDIX L – INSURANCE REQUIREMENTS

\$250,000 catastrophic cash, \$25,000 accidental death and \$25,000 accidental dismemberment.

- I. Business income and extra expense insurance satisfactory to protect its interests in the event of and resulting from direct physical loss of or damage to the Board's or charter school's real or personal property, fixtures and equipment, while such property is located in or on the premises of the charter school.

Any and all policies of insurance maintained by the Charter School pursuant to this Section shall be deemed primary to any potentially applicable policy or policies of insurance maintained by the Board of Education of Baltimore County and/or their respective officers, agents, employees and representatives.

**The Board and Board's elected and appointed officials, officers, directors, trustees, consultants, agents and employees shall be named as additional insureds under the commercial general liability and umbrella excess (or excess liability) coverages, and each certificate of insurance, or each certified policy if requested, must so state this.**

### **Requirements**

The Charter School shall provide copies of all required policies of insurance and certificates of coverage to: Risk Manager, Office of Employee Absence and Risk Management, Baltimore County Public Schools, 6901 Charles Street, Building B, Towson, Maryland 21204.

The Charter School shall file all required policies of insurance and certificates of coverage by the date set out in the Pre-Opening Requirements and annually prior to the first day of school. Any deductibles or retentions in excess of \$10,000 shall be disclosed by the Charter School and are subject to Board's written approval. Any deductible or retention amounts elected by the Charter School or imposed by the Charter School's insurer(s) shall be the sole responsibility of the Charter School.

If the Charter School does not meet the insurance requirements herein, the Charter School shall forward a written request to the Office of Employee Absence and Risk Management for a waiver in writing of the insurance requirement(s) not met or approval in writing of alternate insurance coverage, self-insurance, or group self-insurance arrangements. If the Office of Employee Absence and Risk Management denies the request, the Charter School must comply with the insurance requirements as specified herein.

## **APPENDIX K – CONSTRUCTION PLANS**

### **Public Charter School Construction Plans**

**Title:** Approval of Construction Plans

**Authority:** Education Article, § 2-303(f), Annotated Code of Maryland

**Purpose:** The following requirements shall be followed by local school systems and charter schools to obtain the State Superintendent's approval of certain school construction projects.

#### **Applies to:**

1. Plans or specifications for the remodeling of or addition to a school building if the remodeling or addition costs more than \$350,000.
2. Plans or specifications for the construction of a new school building.
3. Change orders that cost more than \$25,000 for the remodeling, restoration, or construction of a school Building.

#### **Exceptions:**

1. Capital improvement projects approved for planning and/or funding by the Board of Public Works pursuant to Education Article, 5-301, Annotated Code of Maryland, are not reviewed under these procedures. They are reviewed and approved under the procedures of the Interagency Committee on School Construction, Public School Construction Program.
2. Systemic renovation projects such as mechanical system upgrades, reroofing and boiler replacements do not require review and approval.
3. Construction and installation projects for portable classroom buildings do not require review and approval.
4. Projects in buildings used for administrative, operations, maintenance and storage use only do not require review and approval.

#### **Procedures:**

1. Requests for approval shall be in writing from the local school system or, for charter schools, from the local school system as chartering authority.
2. The local school system or chartering authority shall review and approve the project to its satisfaction prior to submission of the request for approval to the State Superintendent.
3. The local school system or charter school shall obtain all approvals required by the fire marshal and other State and local agencies prior to submission of the request for approval to the State Superintendent.

## **APPENDIX K – CONSTRUCTION PLANS**

4. The Maryland State Department of Education may inspect the site and may require review by other State agencies as a part of its evaluation.
5. The State Superintendent shall approve or disapprove the project in writing.
6. If the State Superintendent disapproves a project, the Superintendent shall state the reasons for disapproval in writing.
7. Requests for approval shall be addressed to:

Chief, School Facilities Branch  
Maryland State Dept. of Education  
200 West Baltimore Street  
Baltimore, Maryland 21201

### **Information to be submitted (State action):**

1. Notification of intent to proceed with a project (information)
2. Educational specifications or architectural program statement (review and comment)
3. Schematic design documents (approve)
4. Design development documents (approve)
5. Construction bid documents (approve)
6. Construction contract award - bid tabulations, alternates, record of local board action (approve)
7. Change orders over \$25,000 (approve)
8. Certification of completion (information)

### **For further information please contact:**

Chief, School Facilities Branch  
Maryland State Department of Education  
200 West Baltimore Street  
Baltimore, MD 21201  
Phone: 410-767-0097

## **APPENDIX I – FACILITIES REQUIREMENTS**

### **SAMPLE LIST OF FACILITIES REQUIREMENTS FOR CHARTER SCHOOLS\***

- Name and address of planning consultant for school design in the proposed facility.
- Educational specifications for proposed facilities approved by the Interagency Commission On School Construction.
- Construction documents for the build out or construction of the proposed facility
- Occupancy permit from County with required approvals including, but not limited to:
  - Current Building Code
  - Fire marshal/life safety code
  - Americans with Disabilities Act (ADA) accessibility
  - County health department code
  - County electrical building code
  - Environmental compliance including:
    - Asbestos Hazard Emergency Response Act (AHERA)
    - Lead Contamination control Act
- Any other county requirements.
- Any state charter school requirements not on this list.
- Updated Pressure Vessel Inspections and Certificates, if needed.
- Technology to ensure access to school system main server and software programs necessary for administrator, secretary, and Special Education staff, at minimum.
- Communication system so that teachers can communicate with main office from classrooms for emergency announcements as required in Negotiated Agreement.
- BCPS approved technology that coordinates/ communicates with BCPS security camera monitoring systems.
- BCPS approved technology at the cafeteria serving line that coordinates/communicate with BCPS student financial account information system.
- Approval letter from the landlord giving approval of the proposed tenant improvements (as required).
- BCPS approved kitchen equipment plan.
- BCPS approved operations/maintenance program for building sanitation and maintenance.

## **APPENDIX I – FACILITIES REQUIREMENTS**

- Comply with any physical requirements as dictated by bargaining units such as TABCO, OPE, etc.
- Assurance that mechanical systems provide adequate ventilation in occupied areas.
- Traffic flow plan to ensure safety of charter school students, families, and staff while minimizing impact on surrounding community.
- Prior to release of funds for rent payment:
  - Copy of lease agreement.
  - Provisions in agreement that protect school system.
  - Copy of insurance policy that provides protection for school system and charter school.

\*Based on list developed by Baltimore County Public Schools, January 2021