

Application Components and Guidelines for Submitting a New Charter School Application

For Charter Schools Seeking to Open in School Year 2025-26

The Board of Education of the School District of Philadelphia presents this charter school application for new charter schools. Applicants may submit an application for a new charter school to open in the 2025-26 school year. All charter schools approved through this process will be public schools in Philadelphia, in accordance with the Pennsylvania Charter School Law.

Updated September 2024

**Charter Schools Office
The School District of Philadelphia
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APPLICATION INSTRUCTIONS

Overview

The Charter Schools Office (“CSO”) of The School District of Philadelphia (“School District”) is accepting applications for charter schools planning to open for the 2025-26 school year, in accordance with the Charter School Law. Initial charters may be granted for terms of three to five years, at the discretion of the Board of Education.

The Board of Education recognizes that some Applicants may prefer to incorporate a planning year into their proposal, and therefore the CSO, on behalf of the Board of Education, will also accept applications for proposed charter schools that would seek to open in the 2026-2027 school year. Any Applicant requesting a planning year should clearly indicate this request in the application and in the Letter of Intent. The year that the proposed Charter School intends to open should be clearly and consistently stated throughout the application and required exhibits.

Letter of Intent

Applicants are encouraged to submit a Letter of Intent (“LOI”) prior to submitting the final application. LOIs are due to the CSO by **5:00PM ET on Tuesday, October 15, 2024**. See **Appendix I** on the CSO website for the format.

Application Submission

Complete applications **must** be received by the CSO **no later than 5:00PM ET on Friday, November 15, 2024**. This deadline is established by the Charter School Law. No exceptions will be made to this deadline. Unless the CSO receives notification that an entity that submitted an LOI will not be submitting an application, the point of contact identified on the LOI will receive a link to a folder to submit a digital copy of the application. Applications must be complete upon initial submission. No supplementary materials will be accepted or considered after submission of the application. All documents, policies, and procedures submitted should be specific to the proposed charter school. A list of required attachments and naming conventions for attachments can be found in **Resource II**.

The proper submission of proposals includes: (i) a completed application submitted electronically no later than **5:00PM ET on Friday, November 15, 2024**; and (ii) an original, printed, hard copy of the completed application submitted no later than **5:00PM ET on Tuesday, November 19, 2024**. With the hard copy, the Applicant must submit a signed certification stating that the hard copy is an exact replica of the electronic version submitted on or before **Friday, November 15, 2024** and does not include any additional or revised content. The application filed on or before **Friday, November 15, 2024** will be the form and content evaluated by the School District. Instructions on electronic submissions will be provided by the CSO to each Applicant upon receipt of an LOI.

After receipt by the CSO, the completed Narratives and Fact Sheets will be posted on the CSO's website.

Narrative Format

- The Application Narrative may not exceed **75 pages**.
- If a specific question does not apply, please respond "Not Applicable."
- Submit the Narrative in Portable Document Format ("PDF").
- The Narrative must be typed with minimum 1-inch page margins and a minimum 11-point font.
- All pages should be numbered.

Attachments Format

- Attachments will not count toward the Narrative's limit of 75 pages.
- Required attachments should be clearly labeled and numbered (see **Resource II**).
- Limit attachments to documents requested in the application. If the Applicant believes there are other attachments or space needed to explain the Applicant's proposed programming or operations, or to meet the requirements of the Charter School Law or the School District's application guidelines, that information should be submitted as optional Attachment 44 and clearly labeled to describe the contents. Only one additional, optional folder should be added.
- **The submission of videos (such as .mp4 or .mov files) is neither required nor encouraged due to their large file size.** If videos are essential, the Applicant should provide an accessible link to a hosting or sharing platform (e.g. YouTube or Vimeo) where videos can be viewed rather than submitting video files.

Evidence of Non-profit Status

Any Applicant granted a charter must be a Pennsylvania non-profit corporation. An Applicant is required to present evidence that the charter school entity has been incorporated as a Pennsylvania non-profit corporation at the time of submission of the charter application. If the Applicant is granted a charter, the Applicant will be required to submit to the CSO a copy of the appropriate application for exemption submitted to the IRS prior to the execution of a charter agreement with the School District.

Questions

Applicants who have questions regarding the application process or instructions should contact the Charter Schools Office at **215-400-5786** or charterapplications@philasd.org.

EVALUATION CRITERIA FOR CHARTER APPLICATIONS

Please follow the application format as it appears in the instructions that follow. Applicants must respond to each section completely and thoroughly. In addition to the Application Summary, the Application Narrative consists of six sections:

- 1) Academic Program
- 2) Organizational Capacity and Compliance
- 3) Community Engagement, Support, and Impact
- 4) Finance
- 5) Facilities
- 6) Existing Operator, Manager, or Affiliate

Broadly, charter school applications submitted for the 2024-25 charter application cycle will be evaluated on the following criteria, including but not limited to:

- The extent to which the application considers the information requested in Section 1719-A of the Charter School Law and conforms to the legislative intent outlined in Section 1702-A of the Charter School Law.
- The capabilities of the Applicant, in terms of support and planning, to provide comprehensive learning experiences to students pursuant to the proposed charter.
- The demonstrated, sustainable support for the proposed Charter School plan by teachers, parents, guardians, community members, and students.
- The extent to which the proposed Charter School may serve as a model for other public schools.

These instructions are not intended to be a substitute for an Applicant's deep and thorough knowledge of the requirements of the Charter School Law and other local, state and federal laws applicable to charter schools, Pennsylvania non-profit corporations, and federally tax-exempt organizations.

TIMELINE FOR THE 2024-25 NEW CHARTER APPLICATION CYCLE

Activity	Date	Description
Issuance of Charter Application Instructions	September 15, 2024	<i>Application available on the CSO website</i>
Informational Webinars	September - October 2024	<i>Identical meetings held via webinar for prospective applicants</i>
Letter of Intent (LOI) Deadline	October 15, 2024	<i>LOIs submitted to CSO</i>
Application Submission Deadlines	November 15, 2024 5:00PM ET	<i>Completed applications submitted electronically to the CSO</i>
	November 19, 2024 5:00PM ET	<i>Hard copy applications mailed or delivered to the CSO</i>
Public Hearings	An initial hearing will be held by the Board of Education within 45 days after receipt of the application by CSO. The Board of Education reserves the right to hold additional public hearings at its discretion.	<i>Hearings held in accordance with the Charter School Law</i>
Board of Education Vote on Applications	No earlier than 45 days and no later than 75 days after the first hearing is held, unless otherwise agreed to by the parties.	<i>The Board of Education grants or denies new charter applications at a public meeting</i>

APPLICATION OUTLINE

Section	Application Components
Application Fact Sheet	
Application Summary	
Academic Program	1. Mission Overview
	2. Curriculum and Educational Plan
	3. Diverse Learners
	4. Extracurricular Activities
	5. Student Supports and Services
Organizational Capacity and Compliance	1. Founding Applicant/Coalition
	2. Governance
	3. Third-Party Service Providers Managing Educational, Operational, and/or Financial Functions
	4. School Operations
	5. Dissolution Plan
	6. School Leadership
	7. Talent Acquisition, Development, and Evaluation
	8. Staff Benefits
	9. Application, Lottery, Admission, and Enrollment Processes
	10. Student Discipline, Code of Conduct, and Due Process
	11. School Safety Plan
	12. Insurance Coverage
Community Engagement, Support, and Impact	1. Target Community
	2. Student Demographics
	3. Parent, Guardian, Family, and Community Engagement
Finance	1. Finance and Operations
	2. Financial Policies and Procedures
	3. Fiscal Management
	4. Evidence of Fiscal Solvency
Facilities	1. Facility Suitability
Existing Operator, Manager, or Affiliate	1. Applicant Background
	2. Proposed School Context
	3. Track Record of Successful Outcomes and Compliance
	4. Capacity for Replication
Attachments	<i>Refer to Resource II: Application Requirements Checklist for an outline of all required attachments.</i>

APPLICATION NARRATIVE

All information provided in the application should be as specific as possible. Should a charter be granted, the application as submitted would be incorporated into the proposed Charter School's charter, and as such, the application should reflect confirmed and final details regarding the Applicant's proposed Charter School plan. The Narrative may not exceed 75 pages, excluding attachments.

APPLICATION SUMMARY

This section is a brief overview of the application, and should be no more than **three pages** out of the total 75-page Narrative.

- 1. Academic Program Overview:** State the proposed Charter School's name, mission, focus, model, or type, if applicable (i.e. STEM, project-based, arts, etc.). Summarize the instructional model, proposed curriculum, plan to create a positive learning environment where all students are supported and successful, and capacity to execute the academic program.
- 2. Organizational Capacity and Compliance Overview:** Describe the team's capacity to manage the operational and governance aspects of the proposed Charter School. Summarize the five-year growth plan for the proposed Charter School in terms of enrollment, leadership, and staffing.
- 3. Community Engagement, Support, and Impact Overview:** Describe the proposed Charter School's potential impact on the target community, neighborhood, or zip codes ("target community"). Describe any geographic preference that would be part of the enrollment process. Explain how the proposed Charter School would provide expanded educational opportunities in Philadelphia and the target community.
- 4. Finance Overview:** Describe the team's capacity to manage the financial aspects of the proposed Charter School.
- 5. Facilities Overview:** Describe the proposed Charter School's proposed facility and the team's capacity to manage it.
- 6. Existing Operator, Manager, or Affiliate Overview:** Summarize the team's background and record of success in operating and working with schools similar to the proposed Charter School.

ACADEMIC PROGRAM

This section details the proposed Charter School's mission, curriculum, instructional methods, assessment strategies, and student supports.

1. Mission Overview

- a. **Mission and Vision:** State the proposed Charter School's mission, describing its core philosophy. Describe the vision of the proposed Charter School, including highest priorities and what will be accomplished when the proposed Charter School successfully executes its mission.
- b. **Instructional Model:** What is the proposed Charter School's anticipated instructional model, and how would the instructional model support the proposed mission? Response must address how the instructional model and techniques are equitable, antiracist, and inclusive of diverse voices and perspectives across grade levels and content areas.
- c. **Legislative Intent:** Describe the innovative aspects of the proposed Charter School and the ways in which it would fulfill the legislative intent outlined in Section 1702-A of the Charter School Law.
- d. **Evaluation of Mission Implementation:** If the proposed Charter School were to be approved, in the final year of the charter term the CSO would review mission related artifacts, conduct stakeholder conversations, and observe the proposed Charter School as part of a site visit. Describe what the CSO would learn about the proposed Charter School's implementation of its mission and educational plan through these evidence sources.

2. Curriculum and Educational Plan

- a. **Proposed Curriculum and Rationale:** Provide an overview of the proposed research-based curriculum and the rationale for selecting this curriculum. Explain how the curriculum is aligned to the proposed Charter School's mission, anticipated student population, and Pennsylvania state standards.

Attachment

1

Provide the comprehensive curriculum objectives and full content in accordance with PA Code and PA Core and Academic Standards for each subject area for each grade to be taught Year 1 of the charter term.

- b. **Staffing Model:** Describe the staffing model (e.g. students per classroom, teachers and aides per classroom, teacher to student and adult to student ratios, alignment of staff experiences to the anticipated student population, etc.) and indicate the specific instructional models used by grade level (e.g. co-teaching, team teaching, small group instruction, etc.).
 - i. Within the Narrative, provide a staffing table that identifies Year 1 positions and positions to be added through Year 5. Table should include all administrative, instructional and non-instructional personnel, contracted professionals, and any other staff that may contribute to the proposed instructional model. Different positions should have different titles (e.g. ESL Teacher and ESL Coordinator). If a position is anticipated to be filled by one person, titles must be consistent in all materials presented within the application.
- c. **School Calendar:** Describe the proposed Charter School's academic calendar and the rationale of how this approach is aligned to the proposed educational model.

Attachment

2

Provide a copy of the school calendar and identify hours of operation to demonstrate compliance with Section 1715-A regarding minimum days or hours of instruction per year: 180 days or 900 hours for elementary grades; or 180 days or 990 hours for secondary grades.

- d. **Academic Success Goals:** Describe the annual academic performance, growth, and attendance goals for the proposed Charter School each year of the proposed charter term. Goals must have the following attributes: (i) clear and quantifiable; (ii) inclusive of all student subgroups; (iii) aligned to Pennsylvania standards for accountability; (iv) demonstrate a commitment to continuous improvement and equity; and (v) be appropriate for the target student population. Describe how the proposed Charter School will monitor progress towards these goals throughout a school year.
- e. **Non-academic Goals:** Describe the annual non-academic goals for the proposed Charter School for each year of the term. Goals must be clear, quantifiable, inclusive of all student subgroups, and must demonstrate a commitment to equity for the target student population. Explain why the proposed goals are appropriate and measurable within the initial term of the charter. Describe how the proposed Charter School will monitor progress towards the aforementioned goals throughout the school year.
- f. **Assessments:** Identify measures and assessments (both formative and summative) the proposed Charter School will use to measure and monitor academic success. Explain how these assessments align with the proposed Charter School's mission, curriculum, performance goals, and PA standards. If there is an absence of PSSA and/or Keystone data, what measures and

assessments will the proposed Charter School use to measure academic success? Identify the threshold for each assessment that would initiate corrective actions from the school leader and then which thresholds would initiate actions from the Board of Trustees (“Board”) of the proposed Charter School.

Attachment

3

Provide the annual academic performance and growth goals for the proposed Charter School for each year of the charter term. Identify the measures and assessments (both formative and summative) that will be utilized to measure and monitor academic success. Use the Excel template provided in Appendix III, and submit the attachment as both Excel and PDF documents.

- g. Data-Driven Instruction:** Describe the plan for a comprehensive system to gather and evaluate student data to inform instruction and school-wide decision making. Describe how student subgroup data will be reviewed to drive towards equity.
- h. Promotion and Retention:** Explain the proposed Charter School’s policies and processes for promoting and retaining students. Response must address:

 - i. Academic Measures.
 - ii. Non-academic Measures.
 - iii. Exit Standards for Terminal Grades.
- i. High School Application and Selection Process** *(for Applicants intending to serve Grade 8 by scale year)*: Describe the proposed Charter School’s plan to support students in Grade 8 in navigating the school selection process and the transition to high school.
- j. Graduation** *(for Applicants intending to serve high school grades by scale year)*: Identify and describe the proposed Charter School’s graduation requirements. Include information as to how the proposed Charter School’s requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce). Response must address:

 - i. Exit standards for graduating students.
 - ii. The minimum course credit requirements and the distribution across subjects and grades in adherence with PA Code.
 - iii. The requirements and standards for credit accumulation for any credit recovery, credit acceleration, or dual enrollment programs.
 - iv. How the proposed Charter School plans to satisfy graduation requirements outlined in Act 158, including tangible goals related to Act 158, which must be listed in Appendix III.

- k. **Student Persistence** (*for Applicants intending to serve high school grades by scale year*): Explain what systems the proposed Charter School will implement for students at risk of dropping out or not meeting the proposed high school graduation criteria within four years. Response must address:
- Making up credits in a timely manner for students who enter the proposed Charter School with missing credits.
 - Retention strategies for students at risk of failing to graduate on time due to non-academic reasons, including education instability as defined under Act 1 of 2022.

3. Diverse Learners

- a. **Students with Disabilities:** Describe the proposed Charter School's methods and strategies for identifying and serving students with disabilities (both low and high incidence), including but not limited to students with Individualized Education Plans (IEPs) or Section 504 plans, in compliance with all applicable laws and regulations. Response must also address:
- Identification process.
 - Continuum of services, including related services.
 - Assessment and monitoring progress.
 - Why the proposed curriculum is likely to successfully differentiate education for students with disabilities. Cite any research or evidence that supports the appropriateness of the school's approach to serving students with disabilities.
 - School staff and external or contracted professionals and the responsibilities each will carry out related to special education.
- b. **English Learners:** Describe the proposed Charter School's methods and strategies for correctly identifying and appropriately serving English Learners (ELs) in compliance with applicable laws and regulations. Response must address:
- Identification and Assessment process.
 - Proposed Charter School's Language Instruction Education Program (LIEP) chosen model and rationale for the choice.
 - Progress Monitoring process.
 - Reclassification criteria.
 - School staff and external professionals and the responsibilities each will carry out related to English as a Second Language (ESL) education.

- c. **Students from Diverse Racial and Ethnic Groups:** Describe how the proposed Charter School's educational program will promote equity and antiracist voices and perspectives, as well as recognize and respect the strengths, experiences, and needs of students of color.
- d. **Students Requiring Additional Academic or Behavioral Support:** Describe how the proposed Charter School's educational program will identify and meet the needs of all students, including students without IEPs or 504 plans, who require academic or behavioral support or intervention beyond that provided in the general education program. Identify specific tiered and/or differentiated instructional strategies, programs, services, or supports.
- e. **Gifted Students:** Explain how the proposed Charter School's education program will identify gifted students and how the proposed curriculum is likely to succeed with this student subgroup.
- f. **Students with Limited Access to Technology:** Describe the proposed Charter School's understanding of technology access in the target community. Explain how the proposed Charter School will ensure that all students have all necessary technology and devices, as well as high-speed, reliable internet service in order to fully engage in digital and/or remote learning.

5. Student Supports and Services

- a. School Culture and Climate:** Identify and explain the systems, development, implementation, and monitoring of a school culture that will promote a safe, positive, and inclusive learning environment and reinforce students' intellectual and social development. Response must also address:
- i. The proposed Charter School's philosophy on creating a positive, safe, student-centered learning environment, specifically addressing the approach and mindset needed to ensure that racially-diverse and gender nonconforming or self-identifying youth experience a feeling of belonging within the school community.
 - ii. Cultural competency as it pertains to the target or expected population.
 - iii. Bullying and harassment prevention programming (Policies should be included in Code of Conduct).
 - iv. Staff roles and responsibilities to fulfill aforementioned systems.

- b. Student Health Supports and Services:** Describe the proposed Charter School's system of support to address student mental, socioemotional, and physical health, including trauma, food and housing insecurity, giving consideration to how these factors could impact academics. Response must also address:
- i. Data about the proposed Charter School's neighborhood and anticipated needs of the target student population (e.g., homelessness, food insecurity, trauma, gun violence, or other topics) and identification processes of students who may be in need of these services.
 - ii. How the proposed staffing model is sufficient in scale and expertise to meet student needs for the target population.
 - iii. Resources that will be utilized to address the needs.

ORGANIZATIONAL CAPACITY AND COMPLIANCE

This section provides an overview of the proposed Charter School's founding coalition, governance, staffing, professional development, and operational plans.

1. Founding Applicant/Coalition

- a. **Applicant Capacity:** Provide a detailed explanation for why each founding coalition member was selected and their role in writing and developing this application. Explain how the Applicant has the collective capacity to successfully perform all tasks needed to open a new charter school that may include, but is not limited to, knowledge and/or experience in finance, operations, curriculum and academic planning, facilities, relevant law, governance, community engagement, serving diverse populations, and fundraising.

Attachment

5

Provide detailed resumes identifying education, work, and volunteer experience of each founding member.

- b. **Incorporator:** Identify the incorporator of the charter corporation.

Attachment

6

Provide a copy of the Articles of Incorporation filed with the Pennsylvania Department of State.

2. Governance

- a. **Proposed/Potential Board Members:** Identify the proposed or potential Board members. Explain the collective qualifications of proposed or potential Board members for governing the proposed Charter School and note whether additional Board members are being recruited and, if so, for what areas of expertise.
 - i. Describe the plan to transition from the founding coalition to governance by a Board of Trustees, including the timeline and process for Board recruitment.
 - ii. Describe the Board's relationship to the proposed Charter School's administration, teaching staff, students, parents, guardians, families, and community members.
- b. **Board Responsibilities:** Describe lines of authority among the Board, any charter management organization, legal counsel, advisory bodies (if any), administration, staff, parents, guardians, families and students.
 - i. Explain how the Board will become familiar with and comply with the

Sunshine Act, the Public Official and Employee Ethics Act, and the Open Records Law.

- ii. Provide details of professional development and training opportunities for the Board, including topics, frequency, and training provider(s).
- iii. Explain and provide a schedule detailing when and where the Board will meet and with what frequency during the calendar year. If meetings after proposed school opening will not be held at the proposed Charter School and/or after school hours, explain how the Board will meaningfully engage with parents, guardians, families, and staff.

Attachment

7

Provide detailed resumes including education, work, and volunteer experiences for proposed Board members.

Attachment

8

Provide the proposed Charter School's organizational chart for Years 1-5. The organizational chart must include the Board, all staff, operations and finance teams, as well as any vendors, such as food services, etc.

- c. **Governance Approach:** Explain the governance approach to compliance with the law and engagement with the school community. Include a list of any committees that the Board will form (e.g., governance committee, education committee, finance committee, audit committee, etc.).

Attachment

9

Provide a copy of the proposed bylaws for the proposed Charter School. Do not attach boilerplate corporate bylaws. The bylaws must be appropriate for the governance of a charter school and aligned to the proposed Charter School's model as detailed in the application.

Attachment

10

Provide a copy of the conflict of interest policy for the proposed Charter School.

3. School Operations

- a. **Third-Party Service Providers Managing Operational and/or Educational Functions:** If the proposed Charter School plans to receive services from or work with a Charter Management Organization ("CMO"), a management vendor that provides a suite of management services but is not a CMO, and/or an educational

support services provider, attach the agreement(s) with the provider(s) and identify:

- i. The proposed provider and the nature of services to be provided, such as operational, finance, educational, and/or a mixture of services. (Note: providers who will be contracted to assist with specific operations areas will be addressed in the following questions.)
- ii. The expected duration of the proposed agreement.
- iii. The names of all directors, trustees, and senior administrators of the proposed third-party service provider. A description of service(s) to be provided and the method of calculating all fees and reimbursements.
- iv. The method(s) and frequency with which the service provider will be evaluated and held accountable. Indicate if any performance bonuses will be paid and any contract termination provisions.
- v. Identify when in the proposed Charter School's operational cycle (pre-opening, Year 1, Year 2, etc.) the CMO and/or other providers would be engaged.

Attachment

11

Provide copies of all third-party agreements for the provision of services related to or the management of the proposed Charter School's educational, operational, and/or financial functions, as applicable.

Note: If the Applicant proposes to use both a CMO and a business and financial management contractor, submit the CMO-related agreements as Attachment 11 and the agreement for business and financial management as Attachment 14.

Attachment

12

If applicable, provide a table indicating the percentage of time each CMO or network-level employee will dedicate to the proposed Charter School and to the existing schools in the network. The template for this table can be found in Appendix IV.

b. Technology Management: Describe the plan for the management of the building's technology, including devices, wiring, internet services and professional development. Responses should address:

- i. The roles and responsibilities of school-based staff overseeing technology.
- ii. If contracted resources are utilized, the roles and responsibilities of contractors, the rationale for selecting the proposed vendor, and the expected duration of the proposed agreement.
- iii. If contracted resources are utilized, the method(s) and frequency with which the technology management contractor will be evaluated and held accountable. Indicate if any performance bonuses will be paid and clearly describe any contract termination provisions.
- iv. If contracted resources are utilized, the service(s) the contractor will provide and for what anticipated annual cost during each year of the proposed

- Charter School's operational cycle (pre-opening, Year 1, Year 2, etc.).
- v. The types of technology that will be available to staff and students.
- vi. The implementation plan for technology used or shared by students and staff (ex. one-to-one laptop program, shared laptop carts, etc.).
- vii. Strategies and resources at school and off-site for students who have limited access to computer devices and high-speed internet.

Attachment

13

Provide copies of any technology services agreements, if applicable.

- c. Business and Financial Management:** Describe the proposed Charter School's plan for business and financial management. If contracted resources are utilized to support business and financial management, identify what aspects of the proposed Charter School's financial management will be contracted out and what the proposed Charter School will continue to manage directly. Identify all proposed third-party service providers, and detail their respective responsibilities. Responses should address:

- i. The roles and responsibilities of school-based staff overseeing business and financial management.
- ii. If contracted resources are utilized, the roles and responsibilities of contractors, the rationale for selecting the proposed vendor, and the expected duration of the proposed agreement.
- iii. If contracted resources are utilized, the method(s) and frequency with which the business and financial management contractor will be evaluated and held accountable. Indicate if any performance bonuses will be paid and clearly describe any contract termination provisions.
- iv. If contracted resources are utilized, the service(s) the contractor will provide and for what anticipated annual cost during each year of the proposed Charter School's operational cycle (pre-opening, Year 1, Year 2, etc.).

Attachment

14

Provide copies of any agreements with third-party providers who will provide financial management services to the proposed Charter School, if applicable.

Note: If the Applicant proposes to use both a CMO and a business and financial management contractor, submit the CMO-related agreements as Attachment 11 and the agreement for business and financial management as Attachment 14.

- d. Food Services:** Describe the proposed Charter School's plan for the provision of student food and nutrition services. Responses should address:

- i. The roles and responsibilities of school-based staff overseeing food services.
- ii. If contracted resources are utilized, the roles and responsibilities of contractors, the rationale for selecting the proposed vendor, and the expected duration of the proposed agreement.
- iii. If contracted resources are utilized, the method(s) and frequency with which the food services contractor will be evaluated and held accountable. Indicate if any performance bonuses will be paid and clearly describe any contract termination provisions.
- iv. If contracted resources are utilized, the service(s) the contractor will provide and for what anticipated annual cost during each year of the proposed Charter School's operational cycle (Year 1, Year 2, etc.).
- v. The daily food service schedule, including the number of meals served at school, whether additional snacks will be provided, when meals will be served, and by whom.
- vi. Whether and how the proposed Charter School plans to participate in the National School Lunch Program (NSLP).
- vii. In what year, if any, the proposed Charter School anticipates meeting the threshold for the Community Eligibility Provision (CEP).
- viii. Whether and how the proposed Charter School plans to offer breakfast to students (e.g., in classroom, grab and go, etc.).
- ix. Any food service program goals (e.g., daily breakfast participation).
- x. How student non-payment will be addressed, such as how students will be assisted with money owed.
- xi. Who will conduct food service inspections and when these inspections will take place.

Attachment

15

Provide a copy of any food service provider agreement, if applicable.

- e. Student Health Services:** Describe the provision of student health services, including nursing services, required screenings and examinations, and the plan for immunization compliance. In the event that the current public health crisis or a new public health crisis occurs during the proposed Charter School's operations, describe the plan and capacity for testing and monitoring.

Responses should address:

- i. The roles and responsibilities of school-based staff overseeing student health services.
- ii. If contracted resources are utilized, the roles and responsibilities of the contractors, the rationale for selecting the proposed vendor, and the expected duration of the proposed agreement.
- iii. If contracted resources are utilized, the method(s) and frequency with which the health services contractor will be evaluated and held

accountable. Indicate if any performance bonuses will be paid and clearly describe any contract termination provisions.

- iv. If contracted resources are utilized, the service(s) the contractor will provide and for what anticipated annual cost during each year of the proposed Charter School's operational cycle (Year 1, Year 2, etc.).

Attachment

16

Provide a copy of any health service provider agreement, if applicable.

- f. **School Building Security:** Describe the approach to building security. Describe how many staff or contractors will work in this operational area, and the anticipated training and scope of work. Responses should address:

- i. The roles and responsibilities of school-based staff overseeing school building security.
- ii. If contracted resources are utilized, the roles and responsibilities of the contractors, the rationale for selecting the proposed vendor, and the expected duration of the proposed agreement.
- iii. If contracted resources are utilized, the method(s) and frequency with which the security contractor will be evaluated and held accountable. Indicate if any performance bonuses will be paid and clearly describe any contract termination provisions.
- iv. If contracted resources are utilized, the service(s) the contractor will provide and for what anticipated annual cost during each year of the proposed Charter School's operational cycle (Year 1, Year 2, etc.).
- v. Whether the proposed school will utilize metal detectors and/or any other form of daily screening for individuals entering the building.
- vi. If the proposed Charter School will utilize security guards, describe their title, uniform, training, and possession of guns, tasers, or other similar devices.

Attachment

17

Provide a copy of any security service provider agreement, if applicable.

- g. **Transportation:** Describe the provision of student transportation services. Include information on all necessary transportation for students throughout the day (e.g., following after-school activities).
- h. **Other Operations Areas:** Describe any other areas of operations that are included in the budget in terms of staff and contractor involvement.

4. **Dissolution Plan:** Describe the Applicant's plan for dissolution of the charter, including the following: (i) designation of a manager to oversee the dissolution and closure process; (ii) policy for processing and transferring student and staff records; and (iii) provision of an escrow account.

5. School Leadership

- a. **School Leader/Principal:** Identify key qualifications, certifications, and responsibilities for this role. Describe the timeline and plans for recruiting, hiring, developing, and evaluating the school leader/principal.
- If applicable, describe the identified candidate's professional biography, and explain why this individual is qualified to lead the proposed Charter School in achieving its academic and non-academic goals.

Attachment 18

Attach a detailed job description for the principal/school leader, including minimum and preferred qualifications.

Note: If there is an identified principal/school leader candidate, also attach that person's resume and certifications.

- b. **Leadership Team:** Describe the structure of the proposed Charter School's leadership team beyond the school leader. Identify the responsibilities and qualifications for key roles.

Attachment 19

Attach detailed job descriptions for the additional leadership/management positions, including minimum and preferred qualifications.

Note: If there are identified candidates for leadership/management positions beyond the school leader, also attach their detailed resumes and certifications.

6. Talent Acquisition, Development, and Evaluation

- a. **Recruitment of Teaching Staff:** Outline the proposed Charter School's procedures for identifying, recruiting, hiring, and dismissing qualified and appropriately certified school personnel, including conducting all required federal and state criminal and child abuse background checks. Response must address:
- Any strategic partnerships the proposed Charter School will establish to aid in talent identification, recruitment, and/or hiring.
 - How all instructional and support positions will be staffed (via direct employment, shared services, contractual services, volunteer or student employment, etc.).

- iii. How the proposed Charter School will ensure at least 75% of its teaching staff is certified; additionally, identify any positions that are expected to be staffed by non-certified personnel and identify who will fill these positions.
- iv. Within the landscape of available job candidates, explain how the proposed Charter School will recruit and maintain a teaching staff that mirrors the anticipated student population.

Attachment

20

Provide the proposed Charter School's hiring and personnel policies.

- b. Leadership/Staff Development:** Describe the Applicant's plan for training, supervising, supporting, and developing staff. Response must also address:
- i. How the proposed Charter School will build human capital within its staff, the types of growth opportunities to be provided for school and teacher leaders, how teachers will be supervised and supported, and opportunities provided for participation in peer observation, collaboration, and/or professional learning communities.
 - ii. How professional development will align with the proposed Charter School's mission, equity goals, proposed curriculum, and how, if at all, professional development will be tailored to specific individuals (or roles) or subjects (or grade levels.)
 - iii. How the success of the professional development program will be measured.
 - iv. Describe the process for improvement and intervention for teachers and leaders who need additional support.

Attachment

21

Provide a detailed professional development plan, including the subject matter of training, frequency of training, and the individuals or groups responsible for providing the training.

- c. Leadership/Staff Evaluation:** Explain how the proposed Charter School will evaluate the performance of the school leader and the faculty. Response must address:
- i. How the proposed Charter School would handle unsatisfactory instructional or operational staff performance.
 - ii. How the proposed Charter School will plan for leadership and teacher changes and turnover; the schedule of instructional staff observations, frequency and nature of feedback and coaching, and the method for evaluation; and information about any guiding frameworks and how data will be used in the teacher evaluation process.

Attachment

22

Provide any evaluation tools that have already been prepared and/or provide a thorough description of the evaluation system.

7. Staff Benefits

- a. Health Care:** Describe the coverage, costs and eligibility for the proposed employee health care plan. Response must include the following items:
- Evidence that the proposed health care coverage and benefits are the same as the coverage and benefits offered to School District of Philadelphia employees.
 - Evidence that the estimated costs for coverage and benefits are realistic projections.
 - A list of any and all positions that are not eligible for all or part of the proposed coverage and/or benefits offered, with a justification for their exclusion.

Attachment

23

Provide the proposed Charter School's health care benefits plan for school employees.

- b. Retirement Plan:** Fully describe the proposed Charter School's retirement plan for employees including eligibility, contributions and benefits. Response must include the following items:
- A statement of the type of plan(s) the proposed Charter School intends to use (e.g., PSERS and/or defined contribution section 403(b) plan).
 - Eligibility criteria for the plan(s) offered.
 - A list of any positions that are not eligible for the plans offered, with a justification for their exclusion.
 - If a defined contribution 403(b) plan is offered in lieu of employees participating in PSERS, a description of the plan and information about whether the plan has been reviewed by PSERS.

Attachment

24

Provide the proposed Charter School's defined contribution section 403(b) plan and information about whether the plan has been reviewed by PSERS, if applicable.

8. Application, Lottery, Admission, and Enrollment Processes

- a. New Student Application and Lottery:** Describe the process the proposed Charter School will use related to the application and enrollment of students, and provide a timeline. Response should address:
- The systems used to collect and validate applications for enrollment, to conduct any lotteries, and to prepare waiting lists.
 - How the appropriate number of available seats prior to a lottery will be determined.
 - How the proposed Charter School will ensure equal application and admission opportunities to all Applicants and ensure that the proposed Charter School will not discriminate on the basis of disability, race, age, creed, color, gender, gender nonconformance, religion, marital status, veteran status, national origin, ancestry and any other protected category or classification as required by law.
 - Any admission preferences, including the order and criteria for any lottery preferences, and how students would be classified based on their application to meet these preferences. If the proposed Charter School seeks to include a geographic preference, please provide details on both the research and community engagement that both informs that desire and ensures that the proposed Charter School could meet enrollment targets.
 - Whether children whose parents or guardians actively participated in the development of the school would be given a preference to enroll in the proposed Charter School, in accordance with Section 1723-A of the Charter School Law; how the Applicant defines “actively participated;” the proportion of total enrollment to be represented by children in this group; and how the proposed Charter School will maintain fair and equitable enrollment practices in light of this exception.
- b. Enrollment:** Describe the process the proposed Charter School will use to enroll students and provide a timeline. Response should address:
- The process, including timelines and required document submission, that students and families must comply with in order to complete enrollment at the proposed Charter School. If operating high school grades, include the process used to evaluate the credits of incoming students towards graduation. Please address this both in terms of annual lottery and backfilling seats that may become available during the school year.
 - The proposed Charter School’s plan for ensuring that student enrollment data will be updated and maintained accurately, and identify which staff member(s) will have this responsibility. Schools will be required to enter all relevant student information into the School District’s system of record for enrollment and payments (currently Infinite Campus). The School District will provide schools with access to this system.

Attach admissions and enrollment policies and/or procedures (e.g.: admissions, lottery, enrollment preferences, waitlists, back-filling rosters, withdrawals, re-enrollment, and transfers), along with a copy of the proposed student application and enrollment materials.

9. Student Discipline, Code of Conduct, and Due Process

- a. **Student Discipline and Code of Conduct:** Provide a detailed description of the proposed Charter School's guiding philosophy around discipline and creation of a Code of Conduct, the steps that were taken in developing it, including input gathered from stakeholders in the proposed community and how the Code of Conduct aligns with the proposed Charter School's mission and stated learning culture. In addition, response should address:
 - i. How staff will be trained on implementation of discipline policies and how the proposed Charter School will ensure that the code of conduct does not disproportionately impact students of color, students learning English, and students with disabilities.
 - ii. How the proposed Charter School will respond to harassment and violence related to gender, sexual orientation, and race.
 - iii. What systems will be put in place to ensure the physical safety and mental wellness of all students, specifically for students of all races and ethnicities and gender nonconforming youth.
 - iv. How students, parents, guardians, and families will be informed of the proposed Charter School's discipline policies and expectations.
- b. **Inclusive School Culture:** Explain how equity, antiracism, and gender inclusivity will influence the proposed Charter School's approach to school culture. In addition, response should address:
 - i. How the proposed Charter School will welcome students of all genders through its building spaces, signage, bathrooms, and policies around pronouns and names.
 - ii. How the proposed Charter School will ensure that the dress code is gender neutral and inclusive of all genders, and does not allow for discrimination against students for their hairstyles or religious headwear.
- c. **Due Process:** Describe how the school will address the needs and rights of all students – including students with disabilities – in disciplinary actions and proceedings, as well as who will be responsible for ensuring compliance with federal laws and regulations governing the discipline of students with disabilities, including conducting and documenting manifestation determination.
- d. **Revising the Code of Conduct:** Describe how the process for updating the code of conduct with student, teacher, parent, guardian, and family input. Response should also address:

- i. The nature and frequency of reporting on student discipline occurrences, including analysis of any disproportionate impact on students of color, students learning English, and students with disabilities.
 - ii. How students, parents, guardians, and families will be informed of any changes to the proposed Charter School's discipline policies and expectations.
- e. Attendance and Truancy Record Keeping:** Describe the plan for tracking and reporting attendance. Additionally, identify which staff member will be the proposed Charter School's attendance designee, as well as detail the proposed Charter School's plan and process for preventing and responding to truancy.

Attachment

26

Provide the proposed Charter School's code of conduct.

Attachment

27

Provide the proposed Charter School's truancy policy and program description.

10. School Safety Plan

- a. School Safety:** Describe the plan to address issues of safety at the proposed Charter School and what strategies will be employed to foster a positive building climate. Response should address:
- i. The steps that have been taken to formulate a comprehensive school safety plan.
 - ii. Identification of the staff position that will be responsible for reporting Act 26 and Gun Free Schools Act violations.
 - iii. Schoolwide systems of response to various threats to school safety. Compliance with Safe2Say requirements found in Act 44.

Attachment

28

Provide a copy of the school safety plan that demonstrates a sound knowledge of Act 26 of 1995, the Safe Schools Act, and Act 44 of 2018. Detail how the school safety plan will be reviewed on an ongoing basis.

- 11. Insurance Coverage:** List the Applicant's anticipated insurance coverages. (See Reference I for the types and limits of insurance coverage that the School District, through consultation with insurance brokers serving the charter school community in Philadelphia, deems to be adequate and appropriate for charter schools. Additionally, provide assurances that the proposed Charter School will maintain the minimum level of all required insurance).



Attachment

29

Provide insurance proposals(s) from broker(s) as evidence that the Applicant has properly budgeted for this expense. Appropriate insurance coverage plans include the following: property and general liability, professional liability, automobile, worker's compensation, and educator's legal liability.

COMMUNITY ENGAGEMENT, SUPPORT, AND IMPACT

This section details the partnerships and community connections that the Applicant has established as part of engaging with students and families, including students in any specific demographic groups.

1. Target Community

- a. **Target Community Needs:** Identify the proposed Charter School's target community and address the following:
 - i. List all of the public school options, both School District and charter, that serve the identified target community. Describe how the proposed Charter School offers a new educational opportunity that will be distinct from the existing school(s) already available to community members.
 - ii. If applicable, identify and describe the rationale for any enrollment preference for students residing in a specific catchment area, zip code, neighborhood, or matriculating from a particular feeder school.
 - iii. Whether the proposed Charter School would be amenable to a full or partial attendance zone (e.g., catchment area, zip code).
- b. **Local Resident and Stakeholders' Needs and Priorities:** Describe any engagement with key stakeholders regarding the Applicant's plans. Identify the steps taken to identify and assess the educational needs and priorities of residents and stakeholders from the neighborhood where the proposed Charter School will be located. Response should address:
 - i. The feedback received from residents, community and civic leaders, local school leaders, local business operators, and other stakeholders.
 - ii. How the curriculum and program provided by the proposed Charter School will meet the needs and priorities of the community.
 - iii. How the proposed Charter School plans to continue to solicit feedback from the community and other stakeholders and how concerns will be addressed and resolved in a transparent manner.
- c. **Community Partnerships:** Describe the capacity in which community agencies or other entities will work with the proposed Charter School. Identify community organizations and/or community leaders that have committed to providing programming or services to students at the proposed Charter School.

Attachment

30

Provide Memoranda of Understanding (MOUs), written agreements, and/or letters of commitment from community partners that specify the resources to be provided or contributed from the partner.

- d. **Community Support:** Describe the extent to which community members and residents support the proposed Charter School.

Attachment

31

Provide concrete evidence of support from the community and residents such as letters of support and petitions.

Note: Evidence of support should include dates, and should be specific to the proposed Charter School, relevant to the target community, and matched with the year that the charter school proposes to open.

- e. **Demand from Parents, Guardians, and Families:** Describe the demand for the proposed Charter School and the method of collecting any attached intent to enroll forms that demonstrate concrete evidence of demand for enrollment. Waitlists from affiliated schools are not considered as valid evidence of demand for the proposed Charter School.

Attachment

32

Provide documentation of intent to enroll in the proposed Charter School from prospective students, parents, or guardians with children who meet age, grade, and residence eligibility requirements for the intended year of school opening.

Note: The attachment should include: (i) copies of intent to enroll forms; and (ii) an editable spreadsheet (Excel or Google Sheet, not a PDF) listing the people who completed the forms.

2. Student Demographics

- a. **Anticipated Student Population:** Explain the anticipated demographics or characteristics of the population to be served and provide evidence that the proposed Charter School will likely achieve and sustain its proposed enrollment figures. Response must address:
- The projected enrollment maximums by grade level for each year of the charter term.
 - The proposed Charter School's anticipated racial and ethnic composition, special education, EL, and free or reduced lunch eligibility rates, explaining how these rates compare to those of local School District schools.
 - Data to support the above projections and evidence to suggest that the proposed Charter School will be able to meet and sustain them over the term of the charter.

- b. Recruitment and Marketing:** Detail the plan for student recruitment and marketing. The plan must provide equal access to any family interested in the new school with children going into the grades the proposed Charter School expects to serve. Response should address:
- i. Details about the Applicant's outreach to all potential students and their families, with a focus on equitable access. Explain the types of recruitment efforts that will be employed to ensure that the proposed charter school's enrollment of at-risk populations will mirror that of the neighborhood and/or School District.
 - ii. The plan should include specific outreach strategies such as partnerships with nonprofits, community organizations, parent groups, other educational providers, etc.
 - iii. The venues and mass media outlets the Applicant will use to reach a wide variety of students and families.

3. Parent, Guardian, Family, and Community Engagement

- a. Role in School Development:** Describe the roles of parents, guardians, families and community members involved in developing the proposed Charter School before its opening school year. Response must address:
- i. How the proposed Charter School will continue to inform prospective parents, guardians, families and the community about the proposed Charter School's ongoing development.
 - ii. How the proposed Charter School will engage prospective parents, guardians, and families in decision-making related to the proposed Charter School's development.
- b. Family Engagement with the School:** Describe how the proposed Charter School will engage with parents, guardians, and families. Response must address:
- i. How the proposed Charter School will engage with parents and guardians of diverse cultural backgrounds.
 - ii. How the proposed Charter School will engage with parents and guardians who speak languages other than English.
 - iii. The frequency of formal and informal parent and guardian communication and interactions at the proposed Charter School.
 - iv. The proposed Charter School's plan to review parent, guardian, and family complaints, concerns, and questions as they arise during the school year.
 - v. Any planned parent associations and the role of such organizations at the proposed Charter School.
 - vi. Which school staff will have primary responsibility for parent, guardian and family engagement and what are the primary responsibilities of these staff members?
 - vii. The plan and orientation processes to engage and prepare incoming

families and students who are new to the proposed Charter School, including those who enter after the school year has begun.

Attachment

33

Provide the policy established to review complaints and concerns of parents and guardians, students, and teachers regarding the day-to-day operations of the proposed Charter School. Include lines of authority and outline steps for a parent, guardian, or citizen to address the Board.

c. Communication of Individual Student Data to Parents and Guardians:

Provide an overview of the information that will be reported to parents and guardians regarding the individual progress of their children. Response must address:

- i. How the proposed Charter School will build sustainable family-school partnerships to communicate individual student data, progress, and plans to strengthen support for learning.
- ii. Specific examples of how and when individual student performance data will be disseminated to parents and guardians.

d. Communication of School-Wide Data to Parents, Guardians, and

Stakeholders: What information will be reported to parents, guardians, and other stakeholders regarding the progress of the proposed Charter School overall? Response must address:

- i. Specific examples of how and when school performance data and reports will be disseminated to parents and guardians.
- ii. How progress on both academic and non-academic goals will be communicated to other stakeholders such as community members, students, and staff.
- iii. Opportunities that will exist for families to engage with teachers and school staff related to their student's academic progress.

FINANCE

This section details financial policies and procedures and demonstrates, under realistic revenue and expenditure assumptions, that the proposed Charter School will remain financially viable for the entire charter term. The proposed budget should align fully with proposed programming, staffing plans, student enrollment projections, and all other aspects of the proposed Charter School.

1. Finance and Operations

- a. **Five-Year Operating Budget:** Describe revenue sources, the amounts from each source, and evidence that these assumptions are reasonable. Include information on all revenues that will be available to the proposed Charter School. Describe expenditures assumptions for each year, including, but not limited to: start-up costs, assumptions regarding staffing and benefits costs, facilities and maintenance costs, itemized security personnel and equipment, supplies, and itemized health personnel and equipment, including personal protective equipment used to minimize exposure to hazards that cause illness.

Attachment

34

Provide a detailed five-year operating budget, including a year-by-year staff list and benefits assumptions for those positions. Use the Excel budget template provided in Appendix V, and submit the attachment as both Excel and PDF documents.

- b. **Budget Flexibility:** Provide evidence that the proposed budget is sufficiently flexible to address unexpected changes to revenues and/or expenditures, as well as evidence that the adjustments will not prevent the proposed Charter School from implementing its proposed model.
- c. **Additional Financial Support:** Detail any evidence of additional opportunities for financial support. Clearly document how the proposed Charter School will raise any funds detailed in the budget and provide letters of commitment for any funds necessary for the proposed Charter School's operation. Included in the letter should be the committed amounts, when the funds will be available, as well as any restrictions on their use. Discuss contingency plans if startup funds are not realized, and/or unexpected circumstances prevent the proposed Charter School from opening on time.
- d. **Supporting Foundations:** Identify any supporting foundations the Applicant expects to create to support the proposed Charter School. Describe the role of the foundation in supporting the proposed Charter School. Provide the names of all proposed foundation directors, trustees, and administrators.

Attachment

35

Provide any commitment letters for financial contributions.

2. Financial Policies and Procedures

- a. **GAAP Compliance:** Outline the policies and procedures that will ensure compliance with Generally Accepted Accounting Principles (GAAP).
- b. **Monitoring Fiscal Health:** Describe how the proposed Charter School will monitor its own financial health. Response must address:
 - i. What financial metrics will the proposed Charter School monitor?
 - ii. What financial reports will the Board receive and with what frequency? How will financial information be provided to the Board in a format that is understandable to all members?
 - iii. Discuss the Board's role in approving the budget, payments to vendors, and any other expenditures.
- c. **Training for Board Members:** Describe how the proposed Charter School will ensure that Board members are sufficiently trained in the fundamentals of sound fiscal management and GAAP.
- d. **Accountability for Fiscal Management and Financial Sustainability:** Describe how the Board will hold the responsible party and the school leader accountable for fiscal management and financial sustainability.

Attachment

36

Provide a set of financial policies and procedures that the organization will use to manage the financial operations of the proposed Charter School. Include the proposed Charter School's internal controls policy.

3. Fiscal Management

- a. **Key Responsibilities:** Describe key responsibilities for each position involved in fiscal management and when during the initial charter term the position will be hired. If contracted resources are employed to provide financial support, identify what aspects of the proposed Charter School's financial management will be contracted out. Identify all proposed third-party service providers, and detail their respective responsibilities.
- b. **Independent Audits:** Describe how the proposed Charter School will ensure independent audits are annually completed in a timely manner.

The question and attachments below should be completed by: (i) Applicants supported by an incubation or launch partner; (ii) Applicants that operate or manage a currently existing or former school in any state; or (iii) Applicants that propose to use a Charter Management Organization (CMO), Educational Services Provider (ESP), or similar entity that currently operates or manages or has formerly operated or managed a school in any state.

4. Evidence of Fiscal Solvency:

- a. Scope and Costs of Services:** Describe the scope and costs of services provided to schools and the fees paid by schools to the Applicant for these services over the past three school years.

Attachment

37

Provide the last three years' audited financial statements for the Applicant's organization and all schools that are managed by the management company.

Attachment

38

Provide the most recent internal financial statements (at least through the end of June 2024). Any and all affiliated/related entities including schools, CMOs/EMOs, and overall operations levels should be distinctly represented.

FACILITIES

This section describes the proposed Charter School's ability to secure, prepare, and maintain a suitable facility within the allotted time frame. The proposed facility should be suitable for the educational programming proposed by the Applicant, including special needs for instruction, administrative and support services, and physical education or athletic spaces.

1. Facility Suitability

- a. **Facility:** Explain how the site is or will be a suitable facility for the proposed Charter School's model, mission, and academic plan, including grade levels to be served at scale. Describe the square footage, building layout, total number of classrooms, administrative space, gym, cafeteria, labs, shared space, gender neutral bathroom availability, other tenants on property, safety, and security. Identify whether proposed growth will require the acquisition of additional space.

Attachment

39

Complete the Facility Planning Questionnaire (Appendix VI).

Attachment

40

Provide facility floor plan clearly indicating suitability for proposed enrollment and grades.

- b. **Location:** Describe the proposed facility, including address and neighborhood. If applicable, provide information about a secondary or backup facility for the proposed Charter School.
- c. **Financing:** Describe the Applicant's plan for leasing or purchasing a school facility which would be ready for full operation of the school prior to the school opening date. Response must address:
 - i. The identity of the owner of the proposed facility and whether the owner is a party related to the Applicant. If the owner is related to the Applicant, identify all directors, trustees, and administrators of the owner.
 - ii. Details and timeline of arrangements made to lease or purchase the facility.
 - iii. Financing arrangements or approvals required to execute the lease or purchase of the proposed facility, as well as contingency plans. If financing arrangements involve tax exempt bond financing or other complex financing, all expected parties must be identified, including any entities related to the Applicant. If entities are related to the Applicant, identify all directors, trustees and administrators of such entities.

Attachment

41

Provide a signed lease or purchase term sheet, or minimally, a letter of intent from the owner or landlord to demonstrate that the facility will be secured in sufficient time to begin the school year. Provide a detailed timetable of the projected steps and dates leading to the opening of the proposed Charter School, including any expected renovations and financing.

- d. Expected Renovations:** Describe any plans and timeframe for renovations to the proposed facility to ensure that the proposed Charter School would be able to open and operate in the facility by the beginning of the expected opening day for the proposed Charter School. Response must address:
- i. Extent of renovations and time period for construction.
 - ii. Required approvals from the City of Philadelphia, including any safety or zoning concerns.
 - iii. Expected financing of renovations.
 - iv. Any contingency plans that may exist.
- e. Facilities Maintenance:** Describe the proposed Charter School's plan for maintaining the facility. Response should address:
- i. How the proposed Charter School will ensure the short-term and long-term health of students and staff in regards to environmental conditions within the building.
 - ii. The plan for management of the daily functionality of the facility, including items such as plumbing, electricity, and heating and cooling.
 - iii. The plan for managing and completing general repairs and emergency repairs in a timely and efficient manner.
 - iv. Which parties (e.g., landlord, tenant, CMO, other) are responsible to perform and pay for which types of repairs, renovations, and construction.

EXISTING OPERATOR, MANAGER, OR AFFILIATE

This section, required for all Applicants, details the Applicant's background operating and working with schools, record of success, and capacity for replication. If the Applicant is the proposed Charter School itself, this section describes the context in which the proposed Charter School would operate if approved. If the Applicant believes that a question does not apply to its situation, the Applicant should explain why, in addition to responding "Not Applicable".

1. Applicant Background

- a. **Current Schools:** Does the Applicant operate or manage a currently existing school (public, district, charter, religious, or private) in any state? If yes, list here (and in Attachment 42) the charter or other school types that the Applicant has launched, and/or is currently operating or managing in Pennsylvania or out-of-state.
- b. **Former Schools:** Did the Applicant formerly operate or manage a school (public, district, charter, religious, or private) in any state? If yes, list here (and in Attachment 42) any school operated by the Applicant that has closed, received a non-renewal notice or revocation notice, had its charter terminated or non-renewed, surrendered its charter, or is operating without a current charter. For such schools, provide the status of each charter school as of the date that this application is submitted.

Attachment

42

Existing Operator, Manager, or Affiliate Dashboard: Complete Appendix VII for all of the Applicant's current, former, approved, revoked, and non-renewed charter schools.

- c. **Incubation Partner:** Is the Applicant working with an incubation or launch partner? If yes, list the partner. Discuss the incubation or launch partner's ability to develop and launch schools that meet the performance expectations of the authorizer.
- d. **Founding Coalition's School Affiliations:** Does the Applicant's founding coalition (See Attachment 5) contain current or former leaders of public, district, charter, religious, or private schools? If so, name the schools and the individuals' roles.

2. Proposed School Context

- a. **Charter Management Organizations:** If approved, would the proposed Charter School be supported by a Charter Management Organization (CMO), Educational Services Provider (ESP), a similar entity that currently operates or manages or has formerly operated or managed a school in any state, or any other entity that provides a suite of educational or management services to organizations? If yes, identify the CMO or other entity. Identify how contractual obligations outlined in the

management agreement would change if additional affiliated charter schools were authorized within Philadelphia or other jurisdictions.

- b. **Proposed Board Members' School Affiliations:** Have the proposed Board members (the individuals whose resumes are in Attachment 7) served on the staff or boards of other schools? If so, name the schools.
 - c. **Proposed School Leader's School Affiliations:** Has the proposed school leader worked at other schools? If so, name the schools and positions held.
3. **Track Record of Successful Outcomes and Compliance** State and local performance reports for Pennsylvania and out-of-state schools identified in this section and in the Applicant Experience table in the Application Fact Sheet will be accessed during the review of this application.
 - a. **Evidence of Capacity:** In this application, is the Applicant leveraging the outcomes of other schools as evidence of capacity to open a new school? If yes, list the schools and describe the track record of achieving the stated mission of each of these other schools.
 - b. **Discussion of Non-compliance:** *For Applicants currently operating or managing brick-and-mortar charter schools within Philadelphia:* Using your 2023-24 Annual Charter Evaluation (ACE), discuss any finding of "Does Not Meet Standard" in the report.
 - c. **Overview of Schools Outside of Philadelphia:** *For Applicants currently operating or managing schools outside of Philadelphia:* Provide an overview of those schools, focusing on enrollment and retention of students at risk of educational failure, as well as each school's academic outcomes including performance, growth, and closing the achievement gap. Discuss the Applicant's ability to develop and operate schools that meet authorizer performance expectations. If any school's most recent renewal recommendation was not for the maximum possible number of years, discuss the context and the approach to addressing areas of non-compliance.

Attachment

43

Reports on Existing Charter Schools: Provide any available reports within five years for existing charter schools from the authorizer and the state education agency for the existing charter schools.

Note: For any school that has been closed, non-renewed, revoked, or surrendered: Provide applicable Board Resolution or legal decision documentation.

4. Capacity for Replication

- a. **School Models or Themes:** Would the proposed Charter School replicate a model or theme used at other existing or former schools? If yes, list the schools and provide details of how they serve as models for replication.
- b. **Sustaining or Improving Outcomes at All Schools:** Identify all schools opened, approved, or proposed to open between 2020-21 and 2024-25 by the Applicant in any State and describe how the Applicant will sustain or improve outcomes for all affiliated schools if approved to open a new charter school.

APPENDICES

Templates for Appendices I-VII can be found on the Charter Schools Office website,
<https://www.philasd.org/charterschools/#charterapplication>.

- I. Letter of Intent**
- II. Application Fact Sheet**
- III. Performance Goals and Assessment Plan**
- IV. Staffing Allocations for CMO/Network Staff**
- V. Budget Template**
- VI. Facility Planning Questionnaire**
- VII. Existing Operator, Manager, or Affiliate Dashboard**

RESOURCE I: INSURANCE PROVISIONS FOR CHARTERS

All Applicants must identify as part of the New Charter Application how they will maintain appropriate and adequate insurance coverages during the entire term of the charter for the proposed Charter School, its employees, and the Board of Trustees of the proposed Charter School.

Insurance Requirements for Charter Schools

Commercial General Liability: Limit of Liability: \$1,000,000 per occurrence combined single limit for bodily injury (including death) and property damage liability; \$1,000,000 personal and advertising injury; \$2,000,000 general aggregate and \$2,000,000 aggregate for products and completed operations.

Sexual Abuse/Molestation Liability: Sexual abuse/molestation coverage in the amount not less than \$1,000,000.

Workers' Compensation and Employers Liability: (a) Workers' Compensation: Statutory Limits. (b) Employers' Liability: \$500,000 Each Accident – Bodily Injury by Accident; \$500,000 Each Employee – Bodily Injury by Disease; and \$500,000 Policy Limit – Bodily Injury by Disease.

Automobile Liability: Automobile coverage with limits not less than the following: \$1,000,000 Combined Single Limit for bodily injury and property damage for all owned autos and/or hired / non-owned autos.

Excess /Umbrella Liability: The Charter School shall maintain Excess/Umbrella Liability coverage in an amount not less than \$5,000,000 per occurrence.

Professional Liability/Educators Legal Liability/Malpractice/Employment Practices Liability/Errors and Omissions: Professional Liability/Educators Legal Liability/ Malpractice/Employment Practices Liability/Errors and Omissions Insurance with limits not less than the following: (a) \$1,000,000 Per Occurrence; (b) \$1,000,000 General Aggregate.

Cyber Security/Privacy Liability (Recommended, not required): (a) Charter School shall maintain coverage for third party liability arising out of breach of privacy, inclusive of confidential and proprietary business information, HIPAA violations and other breaches of personally identifiable information and/or protected health information that may arise from their work with this contract. (b) Minimum Limits of Liability - \$1,000,000 Per Claim; \$1,000,000 Aggregate. (c) Privacy Breach Notification and Credit Monitoring: \$1,000,000 Per Occurrence.

RESOURCE II: APPLICATION REQUIREMENTS CHECKLIST

Applications should be submitted in accordance with the instructions provided by the Charter Schools Office. Please submit all application components according to the naming conventions indicated below.

All submitted documents, policies, and procedures should be specific to the proposed Charter School, for the year the Charter School is proposed to open, and relevant to the student population that the charter school proposes to serve. Applicants should not submit generic or boilerplate documents, or documents that have been developed for any other entity including another charter school.

- **Attachments 11 - 17** are required for Applicants that are contracting with third-party service providers.
- **Attachment 30** is strongly recommended if the Applicant plans to rely on a community partner to provide a service that is integral to the operation of the charter school.
- **Attachment 35** is required for Applicants that include in the budget outside funds (either from fundraising or charitable donations) that are proposed as revenues for the proposed Charter School's operations.
- **Attachments 37 and 38** are required for (i) Applicants supported by an incubation/launch partner, (ii) Applicants that operate or manage a currently existing or former school in any state, or (iii) Proposed Charter Schools that intend to use a Charter Management Organization (CMO), Educational Services Provider (ESP), or similar entity that currently operates or manages or has formerly operated or managed a school in any state.
- **Attachment 44** is an optional attachment if the Applicant is submitting information in addition to the pre-existing attachment folders. Do not create any additional folders beyond this one.
- **All other attachments are required components for application submission.**

APPLICATION REQUIREMENTS CHECKLIST			
#	Application Component	Naming Convention	✓
	Application Fact Sheet (signed)* *This document will be publicly available on the CSO's website.	[School Initials]_FactSheet	
	Application Narrative* *This document will be publicly available on the CSO's website.	[School Initials]_Narrative	
1	Curriculum	[School Initials]_Attach1_Curriculum	
2	School Calendar	[School Initials]_Attach2_SchoolCalendar	
3	Performance Goals and Assessment Plan	[School Initials]_Attach3_Goals AssessmentPlan	
4	Language Instructional Plan	[School Initials]_Attach4_LangInstruction	
5	Founding Coalition Resumes	[School Initials]_Attach5_FoundingResumes	
6	Articles of Incorporation	[School Initials]_Attach6_AOI	
7	Board Member Resumes	[School Initials]_Attach7_BoardResumes	
8	Organizational Chart	[School Initials]_Attach8_OrgChart	
9	Board Bylaws	[School Initials]_Attach9_Bylaws	
10	Conflict of Interest Policy	[School Initials]_Attach10_COIPolicy	
11	Third-Party Service Provider Agreement(s)	[School Initials]_Attach11_ThirdPartyAgreements	
12	CMO/Network Staffing	[School Initials]_Attach12_CMOSTaff	
13	Technology Service Agreement	[School Initials]_Attach13_TechMgmt	
14	Business and Financial Agreement	[School Initials]_Attach14_BusinessMgmt	
15	Food Service Agreement	[School Initials]_Attach15_FoodService	
16	Health Service Agreement	[School Initials]_Attach16_HealthMgmt	
17	Security Service Agreement	[School Initials]_Attach17_SecurityService	
18	School Leader Documents	[School Initials]_Attach18_SchoolLeader	
19	Leadership Team Documents	[School Initials]_Attach19_LeadershipTeam	
20	Hiring and Personnel Policies	[School Initials]_Attach20_PersonnelPolicies	
21	Professional Development Plan	[School Initials]_Attach21_PDPlan	
22	Staff Evaluation	[School Initials]_Attach22_StaffEval	

23	Health Benefits Information	[School Initials]_Attach23_HealthBenefits	
24	Retirement Documents	[School Initials]_Attach24_Retirement	
25	Admissions/Enrollment Policies	[School Initials]_Attach25_Admissions	
26	Code of Conduct	[School Initials]_Attach26_CodeConduct	
27	Truancy Policy and Program	[School Initials]_Attach27_Truancy	
28	Safety Plan	[School Initials]_Attach28_SafetyPlan	
29	Insurance Proposals	[School Initials]_Attach29_Insurance	
30	Partner MOUs	[School Initials]_Attach30_MOUs	
31	Community Support	[School Initials]_Attach31_CommSupport	
32	Intent to Enroll	[School Initials]_Attach32_IntentEnroll	
33	Parent Complaint Policy	[School Initials]_Attach33_ComplaintPolicy	
34	Budget Template	[School Initials]_Attach34_Budget	
35	Commitment Letters	[School Initials]_Attach35_CommitLetters	
36	Financial Policies	[School Initials]_Attach36_FinancialPolicies	
37	Audited Financials	[School Initials]_Attach37_AuditedFinancials	
38	Internal Financials	[School Initials]_Attach38_InternalFinancials	
39	Facility Planning Questionnaire	[School Initials]_Attach39_FacilityPlanning	
40	Facilities Floor Plan	[School Initials]_Attach40_FloorPlan	
41	Intent to Lease or Purchase	[School Initials]_Attach41_FacilityIntent	
42	Existing Operator, Manager, or Affiliate Dashboard	[School Initials]_Attach42_ExistingOp	
43	Existing Operator, Manager, or Affiliate Reports	[School Initials]_Attach43_ExistingOpRep	
44	Other	[School Initials]_Attach44_Other (Clearly Name)	

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