

# ELIGIBILITY FOR EXPANSION

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**Applicants should receive an eligibility determination from the Commission prior to development and submission of an expansion application.** The Commission will not review and will summarily deny applications from schools that are deemed ineligible for expansion based on the eligibility requirements in this application.

## ELIGIBILITY DETERMINATION

An applicant must be an existing charter school operator in good standing as defined in this Eligibility section.

## THRESHOLD REQUIREMENTS

Not every operator of a charter school is eligible to apply for expansion or replication. For example, a school in its fifth year of operation that has been recommended for non-renewal due to poor performance should not be eligible for expansion. Therefore, the Commission has threshold criteria that qualify an operator to apply for growth beyond the terms of the current charter contract. Meeting the threshold criteria does not guarantee that the operator will receive approval; it means that current performance qualifies the operator to apply and be considered for expansion.

### Requirement 1: Three Years of Operation

In order to make a judgment about proposed expansion, the Commission must be able to make a meaningful assessment of the school's performance to date. The Commission has determined that **a school must have completed at least its third year of operation in order to be eligible to apply.**<sup>1</sup> After three years, the school has a baseline (year 1) set of performance information plus two additional years that can establish a pattern or trend for academic outcomes. Similarly, the school will have three full years of compliance information at the time of the Commission's decision. With respect to the independent financial audit and the State Auditor's Office accountability audit, this information will likely be limited to two years, but the Commission can supplement completed audits with review of unaudited financials and leading indicators such as current enrollment.

### Requirement 2: Good Standing

To be eligible for expansion, a school must meet a minimum standard of quality. The Commission defines this expectation as a school's "good standing" to apply. The Commission evaluates good standing in relation to academic, organizational, and financial performance.

### Requirement 2.A.: Academic Performance

With respect to academics, the Commission defines a school's standing in relation to the degree to which it is meeting the criteria for renewal. The Commission rates academic performance according to

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<sup>1</sup> An operator may have multiple schools in Washington. Currently, because no new sites may be established under current law, it is only the school seeking to expand that the Commission evaluates for eligibility purposes.

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four “Tiers.”<sup>2</sup> Schools that are in Tier 1 or Tier 2 are on track for renewal of their charter contracts. A Tier 3 school is in question for renewal, and a Tier 4 school is on track for non-renewal. Applying this standard to eligibility for growth, the Commission has determined that **schools with Tier 1 or Tier 2 educational performance status should be eligible to apply for growth to serve more students.**<sup>3</sup>

In cases where schools have a Tier 3 rating OR if the rating is not current as a result of standardized testing irregularities due to the COVID-19 pandemic, recent alternative norm-referenced or criterion-based assessment data will be required to determine academic performance (e.g., NWEA Measures of Academic Progress (MAP) assessments).

**A note on internal, school-generated assessments**

Internal data based on school-developed assessments may inform the Commission’s determination of a school’s academic rating but will not, alone, determine a school’s academic status. The Commission requires externally validated data for a determination.

For school-reported, norm-referenced or criterion-based assessment data, the Commission will determine -- in consultation with the developer of the assessment as needed -- a threshold that would indicate good standing for academic performance for each school based, in part, on its student population.

**Requirement 2.B.: Organizational and Financial Performance**

With respect to organizational and financial performance, good standing means that the Commission does not have significant concerns about the operator or school’s current status. For an operator of a school that has completed at least five years of operation, this standard can be articulated in terms of an unconditional (5-year) renewal of the charter contract and no perceived problems or open corrective action items. For schools with fewer than five years of operation, the Commission considers whether there are deficiencies that require investigation including but not limited to corrective action.<sup>4</sup> If the operator does not have any outstanding deficiencies, then it is eligible to apply.<sup>5</sup>

**All schools seeking to expand should receive an eligibility determination from the Commission prior to development and submission of an expansion application.** The Commission will not review and will summarily deny applications from schools that are deemed ineligible based on the eligibility

<sup>2</sup> See Washington State Charter School Commission, Academic Performance Framework: Methodology (updated 8/23/21).

<sup>3</sup> The suspension of state testing during COVID19 has made assessment of academic performance challenging. The availability and reliability of information about academic outcomes is mixed. The Commission will ensure that its academic performance assessment for purposes of making expansion eligibility determinations is consistent with its overall school performance framework and academic standards for renewal.

<sup>4</sup> See R.C.W. § 28A.710.180.

<sup>5</sup> Prior deficiencies are not, in and of themselves, barriers to school expansion. If a school remedied a previous deficiency promptly and thoroughly, then it may be in good standing for purposes of an expansion eligibility determination.

requirements in this section.

# GENERAL INFORMATION

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## Cover Sheet

Submit the below information, Sections A-E, on the Charter School Application Cover Sheet template

### Section A: School Information

1. School Name;
2. Proposed Expansion Implementation Year (e.g., SY 2022-23);
3. School Type (Elementary, Elementary/Middle, Middle, Junior High, Middle/High, High);
4. Grade Levels Served (K, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12);
5. School District;
6. Neighborhood/Community;
7. Phone;
8. Fax;
9. Website Address;
10. Street Address;
11. Open Date;
12. Contracted Educational Service Provider (EMO, CMO, Other, if applicable);
13. Calendar Type (Standard or Extended School Year); and

### Section B: Primary Contact Person

1. Name:
2. Title:
3. Address:
4. Mobile Phone:
5. Alternate Phone:
6. Email address:

# EXECUTIVE SUMMARY (2 PAGES)

## Expansion Plan Summary

Applicants must submit an Executive Summary that outlines the key elements and considerations of the proposed expansion. Substantive information in the Executive Summary should be further developed in the body of the application.

This Commission reserves the right to use the Executive Summary, in whole or in part, in the Recommendation Report, in press releases, on its website, or in any other communications related to the charter school expansion application process. The Executive Summary will not receive a rating.

**The Executive Summary should contain a concise overview of the following:**

1. How and when the operator proposes to expand.
2. The rationale for the proposed expansion.
3. The school performance considerations that make the school eligible for expansion.
4. Evidence of demand for the proposed expansion.
5. How the expansion will affect the school’s educational program.
6. How the proposed expansion will affect the school’s organizational structure and capacity needs.
7. Facilities needs and plans associated with the proposed expansion.
8. How the proposed expansion will affect the school’s budget and financial plan including transitional expansion financing needs.

# CATEGORY 1: EDUCATIONAL PLAN AND CAPACITY

## Section 1: Expansion Plan (1-2 Pages)

1. **Rationale:**

- State how the proposed expansion aligns with the school’s mission, vision, and long-term goals and whether/how it will affect those goals.
- Describe the student population that the proposed expansion is most likely to serve and the educational needs of that population, if different from the school’s current population.
- Explain how the school expansion will impact opportunity and/or access for students who have been identified as at-risk as defined in RCW 28A.710.010.

### Section 1.1: Evaluation Criteria

*A response that meets the criteria for the **rationale** will*

- *illustrate the plan’s alignment with the school’s mission, vision, and goals;*
- *explain clearly and consistently how expansion will further the mission, vision, goals; and*
- *present a realistic understanding of the population that the expansion is likely to serve including how the expansion will increase opportunities for at-risk (as defined in RCW 28A.710.010).*

2. **Location:** State whether the contemplated expansion will be at the current facility or at a different, proximate location.

**NOTE:** The Commission does not currently have statutory authority to approve expansions to new sites that would constitute establishment of a new school. Therefore, expansions must currently be either at the same or a proximate location.

### Section 1.2: Evaluation Criteria

*A response that meets the criteria for the **location** will*

- *Confirm that the expansion will be located at the current facility OR*
- *Provide sufficient detail for the Commission to confirm that the proposed location will be proximate to the existing school.*

## Section 2: Family and Community Engagement (1-2 Pages)

1. Describe how the school has engaged school families and the school community, including school staff, regarding the proposed expansion.
2. Describe how the school has gauged demand for the expansion including specific evidence supporting the viability of the expanded enrollment projections.

3. Describe how the school has engaged other community stakeholders such as partner community organizations regarding the proposed expansion including evidence of their support.

**Attachment 2.A:** Evidence of support, demand, and engagement from students and families such as enrollment commitment documentation.

**Attachment 2.B:** Evidence of support, demand, and engagement from community partners such as letters of support or memoranda of understanding (MOUs).

**Section 2: Evaluation Criteria**

*A response that meets the criteria for **family and community engagement** will provide evidence that*

- *the school has engaged the school community including documentation of meeting attendance or results of surveys the school conducted;*
- *the school community supports the expansion;*
- *there will be sufficient demand to support the expansion such as statements of intent or affirmative survey responses from families with children whom the expansion would enable to attend the school in the coming years; and*
- *there will be support from community partners that would play a role in the expansion’s success.*

**Section 3: School Culture (1-2 Pages)**

*A response to this section is required for schools whose expansion*

- 1) *Includes the addition of grades not currently served; AND/OR*
- 2) *Includes offering students enrolled as part of the expansion an educational program that is intentionally and substantively different from the one currently offered.*

*This section is not applicable for schools whose expansion is based on adding students in grades already served and for which additional students will receive the same educational program and opportunities as currently enrolled students receive. Those applicants should respond “N/A” for this section.*

Describe the school culture and climate for the school expansion. Address, in particular, the following:

- How the school will adjust student norms and expectations to be age-appropriate for the different ages and developmental stages of students to be served as part of the expansion.
- How the school will adjust student norms and expectations to align with differences in the educational program and philosophy that the school will implement for the expansion.
- How school leadership, teachers, and staff will establish and implement this culture for students and each other.
- Training or professional development the school will conduct with leadership, teachers, and staff to promote successful implementation of the expansion culture and climate.

**Section 3: Evaluation Criteria**

*A response that meets the criteria for **school culture** will*

- *describe a culture that is consistent with and builds on strengths of the current school culture;*
- *demonstrate an understanding of developmental differences and describe age-appropriate adjustments in expectations for the different ages the school will serve through the expansion;*
- *provide evidence to support the rationale and likelihood for success with the changes to the norms and expectations;*
- *describe how the school will prepare teachers, families, and students for changes in the norms and expectations; and*
- *outline anticipated professional development or training that is likely to support successful implementation and budget appropriately for the anticipated cost.*

## Section 4: Student Recruitment and Enrollment (1-2 Pages)

*A response to this section is required for charter schools whose student recruitment and enrollment policies and practices will change materially as part of the proposed expansion. If the expansion plan does not contemplate changes to enrollment policies or practices, then mark “N/A.”*

1. Describe the school’s strategy for marketing and student recruitment related to the proposed expansion including any outreach specifically to at-risk students consistent with admissions and enrollment practices outlined in RCW 28A.710.050.

For changes to the enrollment policies

2. Submit the school’s **current enrollment policy**
3. Submit a **draft of the revised policy**
4. Submit a **statement** describing all material changes to enrollment policy and practices that will accompany the expansion. Material changes include but are not limited to changes in the following areas:
  - The timeline and plan for student recruitment/engagement;
  - Dates for application period and enrollment deadlines and procedures;
  - How the school will receive and process Intent to Enroll forms;
  - The lottery procedures that will be used should student interest exceed capacity;
  - Enrollment preferences for at-risk students or children of full-time employees of the school; and
  - Management of student waiting lists, withdrawals, reenrollment, and transfers.

**Attachment 4.A:** Current enrollment policy

**Attachment 4.B:** Revised enrollment policy (may be a draft)

## Section 4: Evaluation Criteria

*A response that proposes material changes to the school’s **student recruitment and enrollment practices** will meet the criteria for approval if the proposed changes*



- *align with the changes to the student population that the school will serve, and*
- *are consistent with admissions and enrollment practices outlined in RCW 28A.710.050 for outreach to at-risk students.*

## Section 5: Educational Program

### 5.A: Program Design and Essential Elements (2 Pages)

*A response to this section is required for charter schools that will be adding grades in a division not contemplated in the charter contract (e.g., expansion from middle school to add high school grades, expansion from middle school to add elementary grades) or will be offering a distinct educational program that is not already offered (e.g., adding a STEM program).*

***Schools that consider this section to be not applicable should respond “N/A” and include a brief statement (1-2 sentences) explaining why the section is not applicable.***

***Example:*** *N/A. The expansion is for additional students in grades already served; the school will have no changes to the program design or essential program elements.*

Discuss the expansion-related program design including

- Describing expansion-related changes to or new components of the educational program;
- Identifying two to three *expansion-specific* design elements of the program;
- Explaining how the new elements of the program align with and support the existing program; and
- Indicating where the budget reflects anticipated costs for program adoption and implementation.

The expansion-related essential design elements should be characteristics that the applicant considers critical to the expansion program’s success *and* for which the applicant is prepared to be publicly accountable. Schools need not – and should not – include all of the things that they want the expansion program to be. Rather, applicants should strive to identify a *baseline set* of measurable programmatic characteristics by which the Commission can objectively validate that the program as implemented is fundamentally consistent with what the school presents.

**The essential design elements will serve *as the basis for* Educational Program Terms that will be incorporated into the amended charter contract.** These terms will supplement but not replace either the school’s existing Educational Program Terms or the Commission’s ultimate focus on performance standards set out in the Academic Performance Framework.

**Reminder:** The essential design elements are different from school-specific goals that are part of the

school’s Academic Performance Framework. The school-specific academic performance goals focus on what students will achieve. By contrast, the Educational Program Terms capture the essentials of what students will experience. See the Commission’s website for examples of Educational Program Terms.

### Section 5.A: Evaluation Criteria

*For schools that will add grades in a division not currently contemplated in the charter contract or will be offering a distinct educational program that is not already offered, a response to the **program design and essential elements** section will meet the criteria for approval if the plan*

- *presents a clear, coherent description of and rationale for the new elements of the education program;*
- *presents tangible examples that illustrate key design elements;*
- *explains persuasively how the new elements of the program align with the existing program; and*
- *accounts realistically for the costs of program adoption and implementation in the budget.*

### 5.B. Curriculum and Instructional Design (4 Pages)

*A response to this subsection is required for charter schools whose expansion plan includes adoption and implementation of curricula and instructional design not currently in use at the school.*

**Note:** *Because of the distinctly different requirements and demands of a high school program, a response to this section is required for all schools proposing an expansion to add high school grades.*

**Schools that consider this section to be not applicable should respond “N/A” and include a brief statement (1-2 sentences) explaining why the section is not applicable.**

**Example:** *N/A. The expansion is for additional students in grades already served; the school will continue using the same curriculum and instructional design currently in use for those grades.*

Describe the framework for instructional design for the expansion grades including

- the basic learning environment (e.g., classroom-based, independent study) including class size and structure. Demonstrate alignment to the school’s mission, vision, and culture.
- an overview of the curricular choices the school intends to use. Demonstrate alignment with applicable state standards.

**For expansion-related curricula that the school has identified or developed,** describe

- curricular choices such as textbook selection, by subject, and the rationale for each.
- Evidence that the selected curricula will be appropriate and effective for the anticipated student population.

**For expansion-related curricula that the school has not yet identified or developed,** provide a development plan.

Describe the expansion-related instructional priorities including

- how the school will develop and/or select curricular materials;
- primary expansion-related instructional strategies that the school will expect teachers to use; and
- who will be primarily responsible for materials development.

**Attachment 5.B:** Curriculum development plan

**Section 5.B: Evaluation Criteria**

*For schools that will whose expansion includes adoption and implementation of curricula and instructional design not currently in use at the school, a response to the **curriculum and instructional design** section will meet the criteria for approval if the plan*

- *provides a clear picture of the basic learning environment;*
- *credibly illustrates how the curriculum and instructional design align to the mission and vision*
- *[for identified curricula] identifies specific texts and materials to be used with persuasive rationale for their selection; and*
- *[for curricula not yet identified or developed] presents a clear process for identifying or developing materials including key roles and responsibilities and aligned instructional strategies.*

**5.C. Supplemental Programming (2 Pages)**

*A response to this subsection is required for charter schools whose expansion plan includes adoption and implementation of supplemental programming not currently offered at the school.*

**Note:** *Because of the distinctly different requirements and demands of a high school program, a response to this section is required for all schools proposing an expansion to add high school grades.*

**Schools that consider this section to be not applicable should respond “N/A” and include a brief statement (1-2 sentences) explaining why the section is not applicable.**

**Example:** *N/A. The expansion is for additional students in grades already served; the school will continue using the same supplemental programming currently available for those grades.*

1. Describe any extra-curricular, co-curricular, or other student-focused activities or programming the school will offer, including how often they will occur, how it will be culturally responsive, how students can participate in the development and implementation of such activities and programming, and how they will be delivered and funded. Address the process when student interest in the program exceeds capacity. Describe how the budget addresses anticipated costs for development and implementation including who will pay for student participation in district-

sponsored interscholastic programs.

*Definitions: **Extracurricular activities** may be offered or coordinated by a school but need not be explicitly connected to academic learning (sports teams or student clubs).*

***Co-curricular activities** are an extension of the formal learning experiences in a course or academic program (science fair or learning exhibitions if they are not formally graded or credited).*

### Section 5.C: Evaluation Criteria

*For schools that will whose expansion includes adoption and implementation of supplemental programs not already offered at the school, a response to the **supplemental programming** section will meet the criteria for approval if the plan presents*

- *a clear picture of the programs to be offered;*
- *a credible rationale for making the programs available; and*
- *budget detail sufficient to indicate that the school has a viable plan for covering the program costs.*

### 5.D: Supports for Diverse Learners and At-Risk Students (4 Pages)

*A response to this subsection is required if the proposed expansion plan includes adoption and implementation of different supports for diverse learners and at-risk students than are already in place for the current population.*

**Note:** *Because of the distinctly different requirements and demands of a high school program, a response to this section is required for all schools proposing an expansion to add high school grades.*

**Schools that consider this section to be not applicable should respond “N/A” and include a brief statement (1-2 sentences) explaining why the section is not applicable.**

**Example:** *N/A. The expansion is for additional students in grades already served; the school will continue using the same supports currently in use for those grades.*

Pursuant to federal and state law, the Charter School Act, and the charter contract, charter schools are responsible for serving ALL students. This includes, but is not limited to:

- Students with Individualized Education Programs (IEPs);
- Students with Section 504 plans;
- English Language Learner (ELLs);
- Students from low-income families;
- Students identified as highly capable;
- Students experiencing homelessness;
- Students in foster care; and
- Students at risk of academic failure or dropping out.

1. Identify the diverse learners and at-risk groups that the school expects to serve and explain the basis for these assumptions.<sup>6</sup>
2. Detail the overall plan to accommodate the needs of all diverse learners identified above. Include the comprehensive Multi-Tiered System of Supports (MTSS) framework. This framework should include a combination of Response to Intervention (RTI) and Positive Behavioral Interventions and Supports (PBIS).
3. For the diverse learner groups listed above, explain how the school will:
  - a. Identify students who are eligible for services and programs using appropriate screeners and assessments;
  - b. Request and review appropriate student records (including IEP's) from former schools/districts, in order to implement required services on the first day of school;
  - c. Offer and continuum of services and programs that are compliant with state and federal laws and based on research-based best practices;
  - d. Assess and monitor the progress of students;
  - e. Provide adequate numbers of qualified, in-field staff (including contracted services) to meet the needs of students;
  - f. Provide professional development for both specialized and general education teachers to ensure their ability to meet the needs of all diverse learners;
  - g. Provide adequate facilities/space and time in the daily school schedule for the delivery of services;
  - h. Redesignate or exit students from services;
  - i. Inform and involve families in inclusive ways that are consistent with state and federal law;
  - j. Evaluate the overall program.
4. For students in need of or receiving special education services, describe plans for promoting graduation and post-secondary planning for students receiving special education services (high schools only).

#### Section 5.D: Evaluation Criteria

*For schools whose expansion includes adoption and implementation of different supports for diverse learners and at-risk students than are already in place, a response to the **supports for diverse learners and at-risk students** section will meet the criteria for approval if the plan*

- *provides clear rationale for assumptions about the need for different supports;*

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<sup>6</sup> The state currently identifies 14.5% of the students population as students with disabilities.

- *connects the different supports with the educational program and other components of the overall school design such as staffing and professional development; and*
- *provides adequately for the costs of adoption and implementation of the different supports in the budget.*

## Section 6: Student Performance Standards

### 6.A: K-8 Student Performance Standards (2 Pages)

*A response to this section is required if the school is*

- 1) *proposing to add new grades, **and***
- 2) *planning to modify or add to existing policies and standards.*

***Schools for whom this section is not applicable should respond “N/A” and include a brief statement (1-2 sentences) explaining why the section is not applicable.***

Responses to the following items regarding the proposed school’s student performance standards must be consistent with Washington State K-12 Learning Standards.

1. If the school plans to adopt or develop additional academic or non-academic standards, explain the types of standards (content areas, grade levels). Be sure to highlight and describe how the proposed standards exceed the state standards.
2. Explain the school’s policies and standards for grade promotion and grade retention (holding students back).
3. Describe how and when, performance standards, and grade promotion/retention criteria will be communicated in a culturally competent manner to families and students.

#### Section 6.A: Evaluation Criteria

*For schools whose expansion includes adoption and implementation of new or different expectations, the **student performance standards** section will meet the criteria for approval if the plan*

- *adequately shows how learning will address state standards in the context of the school’s expectations;*
- *illustrates how the curriculum and instruction will align with and support student fulfillment of the standards; and*
- *if the expansion will include a change to the oldest grade the school is serving, describe exit standards for that grade including what students completing that grade will know and be able to do.*

## 6.B: High School Graduation Requirements (2 Pages)

*A response to this section is required if the school is expanding to the high school grades.*

***Schools for whom this section is not applicable should respond “N/A” and include a brief statement (1-2 sentences) explaining why the section is not applicable.***

High schools are expected to meet the state graduation standards as established by the Washington State Board of Education (SBE).

1. Explain how students will earn credit hours, how grade-point averages will be calculated, what information will and will not be included on transcripts, and what elective courses will be offered. If graduation requirements for the school will exceed state standards, explain the additional requirements.
2. Explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (e.g., trade school, military service, or entering the workforce).
3. Explain the systems and structures the school will implement for students at risk of not meeting the proposed graduation requirements.

### Section 6.B: Evaluation Criteria

*For schools whose expansion includes adoption and implementation of new or different expectations, the **high graduation requirements** section will meet the criteria for approval if the plan*

- *clearly explains how students will earn credit hours, how grade-point averages will be calculated, what information will and will not be on transcripts, and what elective courses will be offered;*
- *explains any requirements that exceed state standards and how they connect back to the educational program terms and mission/vision;*
- *explains how graduation requirements will ensure student readiness for college or other postsecondary opportunities; and*
- *describes the systems and structures the school will implement for supporting students who are not meeting the proposed graduation requirements.*

## Section 7: Student Discipline (2 Pages)

*A response to this subsection is required if the proposed expansion plan includes adoption and implementation of substantively different student discipline policies and practices based on the different developmental stages and needs of the added grades.*

***Note: Because of the distinctly different requirements and demands of a high school program, a response to this section is required for all schools proposing an expansion to add high school grades.***

***Schools that do not expect any substantive changes to their existing discipline policy and practices as a result of the proposed expansion should respond “N/A.”***

Describe the school’s overall approach to student discipline and how the school will implement this approach specifically in the expansion grades. Include in the description, the ways that the discipline policy and practices

- are culturally responsive and anti-racist;
- are supportive of students in meeting behavioral expectations and keeping them in the classroom to the maximum extent possible; and
- provide for students and families to be informed about the school’s expectations.

**Attachment 7:** Proposed discipline policy *as applicable to the expansion grades.*

**Section 7: Evaluation Criteria**

*For schools whose expansion includes adoption and implementation of substantively different discipline policies or practices, the **student discipline** section will meet the criteria for approval if the plan*

- *adequately describes how the different policies or practices align with the school’s overall approach to school discipline, culture, and climate;*
- *shows attention to being culturally responsive and age-appropriate in supporting students to meet expectations and keeping them in the classroom to the maximum extent possible; and*
- *provides for students and families to be informed about the differences from existing policies and practices.*



## CATEGORY 2: ORGANIZATIONAL PLAN AND CAPACITY

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### Section 8: Organization Structure & Staffing (4 Pages)

Describe the how the organizational and management structure will change as part of the proposed expansion including

- Changes to roles and responsibilities of existing staff members.
- Roles and responsibilities for new positions that the school will create as part of the expansion.
- Experience and capacities required for any new, expansion-related positions and the hiring strategy and plans for those positions.
- Expansion-related roles and responsibilities of the governing board and any related bodies (such as advisory bodies or parent/teacher councils) in implementing and maintaining the expansion.

**Attachment 8:** Organizational chart documenting the changes to the current organizational chart that the school anticipates making as part of the proposed expansion.

### Section 8: Evaluation Criteria

*The **organizational structure & staffing** section will meet the criteria for approval if the plan*

- *reasonably anticipates and accounts for additional staffing needs indicated by the proposed expansion*
- *reasonably anticipates and accounts for new or different staffing capacities indicated by the proposed expansion;*
- *presents an organizational chart that clearly illustrates and aligns with the proposed changes; and*
- *clearly identifies expansion-related roles and responsibilities, especially with respect to decision-making for implementing and maintaining the organizational structure and staffing changes.*

### Section 9: Professional Development (1-2 Pages)

Describe how the expansion will affect professional development including any changes or additions to the school's teacher and staff professional development expectations and opportunities for staff with responsibilities related to the proposed expansion.

Your response should address how the core components of professional development will support the expansion's effective incorporation of the following:

- The school's mission, vision, and values;
  - The expansion portions of the educational program;
  - Different instructional practices to be implemented or prioritized as part of the expansion; and
  - Performance data collection, analysis, and use in alignment with any new grades, new curricula,
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or new instructional approaches to be implemented.

Identify the responsibility for development and implementation of new or expanded professional development responsibilities that will accompany the proposed expansion and how the professional development needs are accounted for in the budget.

### Section 9: Evaluation Criteria

The **professional development** section will meet the criteria for approval if the plan reasonably anticipates

- *professional development needed to support the expansion particularly with respect to expansion-related differences in*
  - *the educational program*
  - *instructional practices*
  - *student discipline*
  - *performance data;*
- *internal and external capacity needed to provide the professional development; and*
- *budget expenses associated with the professional development needs.*

### Section 10: Facilities (3 Pages)

1. Describe the changes to the school's facilities requirements needed to accommodate the proposed expansion, including number of additional classrooms, square footage per classroom, common areas, overall square footage, and amenities.
2. Describe any new specialty classroom needs, including the number of each type and the number of students to be accommodated at one time. New specialty classroom needs may include, but are not limited to, the following: equitable space to deliver pull out services for students receiving special education or other support services, science labs, art rooms, computer labs, a library/media center, performance/dance rooms, auditorium, etc.
3. Describe any new administrative/support space needs, including anticipated number of each: main office, satellite office, work room/copy room, supplies/storage, teacher work rooms, etc.
4. Explain any changes to the core athletic program and facilities-related needs such as a gymnasium, locker rooms, weight rooms, field(s) (football, soccer, multipurpose), baseball/softball field, etc.
5. Describe the current plans for identifying and securing the needed space.
6. Describe the plans for any anticipated construction and renovation, etc.

- 7. Describe the anticipated facilities-related costs for the expansion and the plans for financing those costs.

**Attachment 10.A:** Supporting documents providing details about proposed facilities such as maps, pictures, realtor/broker communications, renovation estimates, etc.

**Attachment 10.B:** Expansion Timeline.

**Section 10: Evaluation Criteria**

*The **facilities** section will meet the criteria for approval if the plan reasonably anticipates*

- *the basic facilities requirements for accommodating the expansion as proposed, including number of classrooms, square footage per classroom, common areas, amenities, and overall square footage;*
- *budget expenses associated with development and maintenance of facilities renovations, build outs, new construction, etc. associated with the expansion; and*
- *financing needs.*



# CATEGORY 3: FINANCIAL PLAN AND CAPACITY

## Section 11: Financial Plan (3 Pages)

Attach an expansion plan budget showing annual revenue and expenditure projections through completion of the proposed expansion.

Describe the impact of the proposed expansion on the school’s budget. Address changes to revenues and expenditures required for development and implementation of the proposed expansion.

Identify the sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Describe any restrictions on access to, or use of, any identified funding sources. Provide evidence of commitment for any funds.

Describe financial benchmarks for moving forward with expansion and any contingency plans in the event that the school does not raise funds as budgeted.

**Attachment 11.A:** Expansion budget.

**Attachment 11.B:** Evidence of philanthropic funding commitments.

### Section 11: Evaluation Criteria

- The **financial plan** will meet the criteria for approval if*
- *the budget aligns with and reasonably anticipates the financial impact of the proposed expansion on revenues and expenditures including expenses for staffing, program materials and supplies, professional development, and facilities;*
  - *the plan provides evidence to document the status and support the reasonableness of fundraising and financing projections; and*
  - *the plan includes reasonable benchmarks and contingency plans that will enable the board and leadership to evaluate progress and make measured decisions about readiness to move forward.*

## ATTACHMENTS

The attachment numbering, below, corresponds with the relevant sections of the application. Number your attachments consistent with this numbering. For attachments that are not applicable, list the attachment and type "N/A." Do not change numbering for subsequent attachments even if there are ones not applicable to your application.

**Attachment 1:** Evidence of support, demand, and engagement from students and families such as enrollment commitment documentation.

**Attachment 2.A:** Evidence of support, demand, and engagement from students and families such as enrollment commitment documentation.

**Attachment 2.B:** Evidence of support, demand, and engagement from community partners such as letters of support or memoranda of understanding (MOUs).

**Attachment 4.A:** Current enrollment policy

**Attachment 4.B:** Revised enrollment policy (may be a draft)

**Attachment 5.B:** Curriculum development plan

**Attachment 7:** Proposed discipline policy *as applicable to the expansion grades.*

**Attachment 8:** Organizational chart documenting the changes to the current organizational chart that the school anticipates making as part of the proposed expansion.

**Attachment 10.A:** Supporting documents providing details about proposed facilities such as maps, pictures, realtor/broker communications, renovation estimates, etc.

**Attachment 10.B:** Expansion Timeline.

**Attachment 11.A:** Expansion budget.

**Attachment 11.B:** Evidence of philanthropic funding commitments.