This document outlines what is needed in an application to open a public charter school in Baltimore County. These are the evaluation items that our review team will be looking to find in your completed application. Missing segments will disqualify the application.

**PART A: OVERVIEW**

**A1. Executive Summary**

This section should be two to three pages long and should include:

1. Vision and mission statements including a brief explanation of how they were created.
2. Student population to be served, such as key demographic data, targeted geographic area, etc. A complete explanation of the student population the school intends to serve.
3. Size of school when it reaches full enrollment capacity, including the number of classes per grade level and the number of students per class. Criteria used to determine the number and grade levels to be and how this links with the educational philosophy and the mission and vision of the school.
4. Evidence of a community need for a school of this nature. Information on community members and leaders who publicly support the proposed school and their role in the development of the school and application, if the proposed school is not being developed by parents. Include letters of support from community leaders, business people or elected officials. These letters should state why the individual believes a new charter school would best serve the community.

Explain the applicant team’s ties to and knowledge of the community. If the applicant has established any partnerships or networking relationships, describe them and any resources or agreements that are planned.

5. A short explanation of the key programmatic features the school will implement in order to accomplish its vision and mission. Description of educational philosophy and how this will be linked to school design.
6. Any other unique features, such as a non-traditional school year, longer school day, key partner organizations, multiple campuses, school culture, etc.
7. How the proposed school will be more effective than the other schools currently serving the student population.
8. Improves student achievement by increasing learning opportunities for all students, and requiring the continuous measurement of learning outcomes, with a special emphasis on low-performing students.
9. Encourage the use of innovative learning methods.
10. Summarize, for illustrative purposes, a typical day from the perspective of a student in a grade level of your choice.
11. Summarize, for illustrative purposes, a typical day from the perspective of a teacher of any subject or grade of your choice.
12. Describe the culture of the school.
13. Provides a clear plan for establishing a school culture and norms consistent with the school’s mission and educational program and describe how it is implemented for administrators, teachers, students, and parents, from the first day of the school’s operation.
14. Describe how the school plans to involve parents/guardians as partners in the education of their children and build and maintain family-school partnerships that focus on strengthening support for the school’s goals.
APPLICATION COMPONENTS

A2. Profile of Founding Group
Describe the composition of the group that is working to apply for a charter, which demonstrates a track record of success in developing a program which will assist students in meeting rigorous academic standards.

A3. Background Information
Provide the following information on the key players currently involved with the development of the charter school, the authorized agent, principal, and any individuals responsible for the day to day operation of the school. A resume for each individual is also required.

1. Provide three references for each person submitting an employment history, education history, and statement of intent profile.
2. The employment history clearly supports the qualifications and experiences to be considered sufficiently qualified to operate a public charter school.
3. Specifically addresses qualifications and experiences as they relate to the development of academic programs, operations of a school or a small business, and background in financial management.
4. Provide the educational training (including degrees earned, dates enrolled, and institution) and experience that demonstrates operators are sufficiently qualified to operate a public charter school.
5. Provide a personal statement regarding each contributor’s role, responsibilities, and commitment relating to this application and/or operation of the proposed public charter school.

The information and resumes provided will be subject to verification by the Board of Education.

PART B. EDUCATIONAL PLAN

B1. Educational School Design and Student Information:

1. Elements of a school design can be such things as: school size, special programs that will be offered, how professional development is designed, instructional frameworks, the use and infusion of technology, the use of partnerships, performance, promotion, and graduation standards and how resources (time, space and human capital) are allocated, etc.
2. Include a persuasive explanation of how the proposed school design and founding group are likely to accomplish performance outcomes. Addresses each outcome specifically and separately.
3. Present evidence of school design success (if drawing on existing school models) and evidence that the proposed approach will lead to improved student performance for the school’s target population.
4. Present research or other information that supports the efficacy of the school design (if the school design does not have a precedent) describes the research used to formulate the design.

   a. Present a clear rationale for the plan or model that:
      Increases student achievement and decrease student achievement gaps in reading/language arts and mathematics.
   b. Increases high school graduation rates and focuses on serving at-risk high school student populations (including re-enrolled drop-outs and those below grade level).
   c. Focuses on academic achievement of middle school student populations and preparation for transition to high school (if applicable).
   d. Utilizes a variety of high-quality assessments to measure student understanding and critical application of concepts.
APPLICATION COMPONENTS

e. Increase implementation or instructional improvement systems to assess and inform instructional practice, decision making, and effectiveness.

f. Partners with low-performing, local public schools to share best practices.

g. Demonstrates the ability to overcome start-up challenges to open a successful school through management and leadership techniques.

h. Provides access to viable education alternatives to students in regions where there are a lack of alternatives.

i. If the applicant intends to replicate an existing design: Describe the applicant’s capacity to reproduce the school successfully.

j. Provide evidence that the existing design has been effective and successful in raising student achievement. Aligns with the school’s mission and responds to the needs of the school’s target population.

B2. Curriculum and Instruction:
If the school intends to use curriculum that has already been developed, a response that meets the standard will:

1. Present a clear and coherent framework for teaching and learning—particularly in core academic areas and will demonstrate alignment with Maryland’s Common Core Standards and Grade-Level Expectations.

2. Demonstrate understanding of relevant instructional strategies for successful implementation of the curriculum.

3. Provide a description of the student achievement goals for the proposed school’s educational program.

4. Provide the proposed school’s learning standards and curriculum, including a description of the skills and knowledge each student will be expected to attain by the end of each grade in each year of the charter.

5. Thoroughly outlines the instructional methods to be used, including any distinctive instructional techniques to be employed. Describes how this pedagogy will enhance student learning.

6. If the school intends to develop core curriculum, following approval:
   a. Describes the framework for development of the curricula for core subjects.
   b. Identifies a sound research, experience or theoretic base and foundational materials that will guide curriculum development.

7. Present a coherent framework for professional development that is likely to support effective implementation of the curriculum.

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

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

B3. Special Student Populations:
When describing the school’s plan for special student populations and student services, applicant group:

1. Describe the plan for responsive general education classes and how students with disabilities and/or limited English proficiency will be provided with the general education curriculum.
## APPLICATION COMPONENTS

2. Describe the processes and procedures, in compliance with all state and federal laws and regulations that the proposed school will employ to identify, assess, and serve students who are English language learners and gifted and talented.

3. Include a description of required support services to be offered, including where they will be implemented, who will implement them, and how the program will be evaluated.

4. Include a description of how services for English language learners will be delivered within the school’s daily schedule, the titles, salaries, and qualifications of the individuals delivering the services, and the methods they will use.

### Non- and Limited-English Proficient Students

Describe how the charter will meet the needs of Non- and limited-English proficient students. Such descriptions must include the following elements:

1. The process for identification and placement of students whose first language is not English and the methods for determining the kinds of assistance that these students may need.
2. The manner in which the applicant will ensure that English language learner students are not misplaced or tracked inappropriately in other classes.

A description of the planned implementation of the program model, including information regarding the allocation of resources to the service of all non- and limited-English proficient students including:

1. A description of how staff, curricular materials, and facilities will be used.
2. A statement that affirms that non- and Limited-English proficient students will not be excluded categorically from curricular and non-curricular activities because of an inability to speak and understand English.
3. A description of the planned outreach to parents in the community, including strategies for communicating with parents who are not proficient in English.

The school is required to designate a professional staff member as the school’s English for speakers of other languages (ESOL) liaison with BCPS. Responsibilities will include coordinating with the BCPS ESOL office throughout the year to ensure that all required ESOL and related services are being provided.

### Students with Disabilities

Describe how the charter will meet the needs of students with disabilities:

1. The school will adhere to all provisions of federal law, relating to students with disabilities, including the IDEA, Section 504 of the Rehabilitation Act of 1973, and Title II of the Americans with Disabilities Act of 1990.

2. The school will be required, consistent with applicable law, to work with the designated BCPS Special Education Liaison to ensure that all students with disabilities that qualify under the IDEA:
   (a) Have available a free appropriate public education (FAPE).
   (b) Are appropriately evaluated.
   (c) Are provided with an Individualized Education Plan (IEP).
(d) Receive an appropriate education in the least restrictive environment (LRE).
(e) Are involved in the development of and decisions regarding the IEP, along with their parents.
(f) Have access to appropriate procedures and mechanisms, along with their parents, to resolve any disputes or disagreements related to the school’s or school system’s provision of FAPE.

3. The school will be required to designate a professional staff member as the school’s special education liaison with BCPS. Responsibilities will include coordinating with BCPS special education office throughout the year to ensure that all required special education and related services are being provided and that all IEPs are appropriate in the context of the public charter school setting.

4. Describes the anticipated challenges faced in educating the targeted population and describe methods, strategies, and/or programs designed to address these challenges.

5. Describe the processes and procedures, in compliance with all state and federal laws and regulations that the proposed school will employ to identify, assess, and provide specialized instruction to each student in need of special education. Include a description of support services to be offered and how student identification and assessment will be conducted including the development of individualized education programs.

6. Include a description of how services for students in need of special education services will be delivered within the school’s daily schedule, the titles, salaries, and qualifications of the individuals delivering the services, and some of the methods they will use.

7. Indicate the special education staffing levels the school intends to provide by year for each of the school’s first four years.

8. Include the Special Education Administrator who will work with your school, teachers, aides, and other staff, as well as the number of staff you propose to hire each year and their qualifications, salary, and the percentage of time that they will be devoted to special education.

9. Describe any anticipated outsourcing services such as occupational therapy, physical therapy, or speech therapy, indicate that and if possible, indicate anticipated contracting for the provision of these services.

10. Describe any ancillary and support services expected to offer students and families, for example counseling, family outreach, and/or relationships with community organizations or service agencies which may benefit community members. Includes the plan to hire a school nurse and his/her role in your school.

11. Describe any modifications to the plan for special student populations and student services of the proposed school from that which is implemented in the existing school.

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

A response that meets standard will:

1. Include an outreach and marketing plan that demonstrates understanding of the community to be served and is likely to be effective in reaching families traditionally less informed about educational options.

2. Demonstrate understanding of the target population and has a student recruitment plan that will enable the school to attract its targeted population.
### Application Components

3. Demonstrate understanding of and capacity to meet state and federal requirements regarding the identification and education of the English Language Learner (ELL) population.

4. Demonstrate understanding of and capacity to meet state and federal requirements regarding the identification and education of students with disabilities.

5. Include the criteria that will describe the admission and enrollment process. Describe the ways in which the school will endeavor to achieve a racial/ethnic balance reflective of the community it serves.

6. Describe the timetable to be used for registering and admitting students, including a plan for the admission lottery, if applicable, if the number of applicants exceeds the stated program capacity.

7. Describe the proposed student enrollment policy and procedures.

8. Describe the proposed strategies for compliance with compulsory attendance laws.

9. Describe the proposed student withdrawal and transfer policy and procedures.

10. Provide the name or title of the staff member(s) who will take daily student attendance, and maintain accurate enrollment status in the BCPS provided student data system.

**11. Required Exhibit:**
- Student application

---

### B5. Code of Student Conduct

It is expected that discipline procedures would be aligned with those outlined in the BCPS Code of Student Conduct, *Student Handbook*, unless modified in the Charter Agreement.

1. Describe the Code of Conduct to be implemented in the public charter school.

2. Explain the disciplinary strategies and interventions designed to address student discipline in the proposed public charter school.

3. Describe the disciplinary philosophy of the proposed public charter school as it relates to student behavior.

---

### B6. Student Health and Safety

A response that meets standards addresses:

1. Crisis Preparedness: Provides training, resources and technical assistance in preparedness for, immediate response to, and mitigation of the aftermath of school safety crises.

2. School Environment: Provides training, resources, and technical assistance in the establishment of a school/community environment that is physically and emotionally safe, well disciplined, and conducive to learning.

3. Violence Prevention: Information about funds, training, resources, and technical assistance concerning preventing violence, helping students to make safe choices, and collecting data about violence in schools.

4. Health & Safety: Information on environmental factors that might impact students’ health, including disaster preparedness, and safe walking routes to school.

5. Describe plans for health services to be provided by the charter school, or options under consideration. Holding an R.N. or L.P.N license without school nurse certification is not acceptable. Health service staff may be full-time or part-time but students should have health service access during school hours.

6. Health staff are hired, trained, and supervised by Baltimore County Department of Health. All health staff and back-up responders (school staff chosen by the principal) must have CPR and First Aid Training to comply with COMAR 13A.05.05.09. Medications may only be administered by health staff except when, in the absence of health staff (for example on a field trip) the school nurse has delegated the administration to a specific staff member.
B7. School Calendar and Daily Schedule

1. Describe the school calendar, including the number of days school will be in session, the daily hours of operation, and the way the school will be organized for instruction, independent study, intervention programs and extra or co-curricular activities, if any.

2. Be specific in describing these items and pays attention to state requirements on minimum number of school days and instructional hours as described in Maryland’s Regulations.

3. Describe any external programs that will be brought into the school and why.

4. Describe the implementation of the educational program in terms of the daily or weekly organization of students and faculty (e.g., multi-grade, tracking, team-teaching, etc.).

B8. Assessment

1. Describe the plan to assess student performance in the core academic areas. Please include the current baseline standard of achievement, the outcomes to be achieved, and the method(s) of measurement to be used. Include student outcomes and performance standards to include:
   - How will the baseline student academic achievement levels and prior rates of academic progress be established?
   - How will these baseline rates will be compared to rates of academic progress achieved by these same students while attending the charter school?
   - To the extent possible, how will these rates of progress will be evaluated and compared with rates of progress of other closely comparable student populations?
   - Does the charter school have an assessment plan that features multiple measures of student outcomes?
   - Does the assessment plan make adjustments in instruction, assist in decisions about student grouping, promotion, graduation (if applicable), and improve student outcomes?
   - Are the planned assessments in alignment with the proposed curriculum and standards.

2. Describe the methods used to identify the educational strengths and needs of students and the extent to which educational goals and performance standards are being met.

3. Describe how students will participate in the statewide assessment program.

4. For secondary charter schools, describe the method for determining that a student has satisfied the requirements for graduation.

B9. Waivers for Educational Plan

1. Describe any state or local rules generally applicable to public schools for which waivers may be sought.

2. Provide a justification for any waivers of Federal statutory or regulatory provisions that the charter group believes will be necessary for the successful operation of the charter school.

PART C: ORGANIZATIONAL PLAN

C1. School Governance

1. Public school charters are granted to a board of trustees. Members of boards of trustees are public agents authorized by the state and are responsible for governing charter schools. In general, it is important that these individuals on the governing board of trustees possess a wide variety of skills and qualifications that will enable them to found and sustain an excellent school. The board of trustees must be of a number sufficient to provide oversight of the school and to participate in the considerable amount of work required to open and then govern a charter school.
2. Members of a founding group may be proposed for the school’s board of trustees or may assume other roles in the school. The roles and responsibilities of the founding group must be clearly stated. Each founding group should be able to define who is proposed to be a member of the board of trustees and what other roles will be assumed.

3. Present proper documentation that the entity proposing to hold the charter is a nonprofit organization.

4. Demonstrate that the Board has capacity to oversee the successful development and implementation of the education program presented in the application.

5. Demonstrate that the Board has the capacity to oversee the effective and responsible management of public funds and is responsible for the school’s compliance with its legal obligations.

6. Demonstrate that the Board is aware of their duties and responsibilities as public servants in accordance with laws governing non-profits.

**Required Exhibits**

- Articles of Incorporation
- Maryland Certificate of Good Standing (If new, provide application)
- Recent audit report
- Schedule for Meetings
- By-laws
- Prospective Board Members Resumes

**C2. Management and Operation:**

**a. Organizational Structure**

1. Demonstrate understanding of management needs and priorities.

2. Clearly delineate the roles and responsibilities for administering the day-to-day activities of the school.

**Required Exhibits**

- Organizational Chart that shows the staffing structure and reporting responsibilities for the board, administration and staff.

- Key position descriptions including critical skills or experience every employee that they intend to hire based on organizational chart (description can be general for core teachers). Qualifications for hiring should provide assurance that background checks and child abuse registry will be conducted for every employee in accordance with the law.

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

- Proof of application to, or letter form, the Internal Revenue Service (IRS) documenting nonprofit status 501 (3) (c) (if applicable).

- Discuss any plans for recruiting and selection of the school leader if not already identified.
## APPLICATION COMPONENTS

### b. Education Service Providers (ESP):
Select the statement that is applicable and proceed as directed:

- [ ] The school does not intend to contract with an ESP.
- [ ] We intend to contract with an education service provider. **Continue with completion of this section.** If the school expects to contract for services with an education service provider:

1. Discuss the school’s decision to work with an ESP, in general, and the selected ESP, in particular.
2. Describe the planned relationship between the school and the ESP and how that relationship will further the school’s mission and program.
3. Provide a clear description of the services to be provided by the ESP.
4. Describe the ESP’s roles and responsibilities in relation to the school’s management and governing board. Describes the school’s performance expectations for the ESP. In other words, how will the school evaluate ESP performance?
5. A persuasive explanation of the reasons for contracting with an education service provider, in general, and this provider, in particular.
6. A sense of how the proposed relationship with the ESP will further the school’s mission and program.
7. ESP performance expectations that are consistent with the school’s accountability requirements and the means by which the board will hold the ESP accountable for meeting those expectations.

**Required Exhibits**

- [ ] Background information on the ESP including relevant performance data for other schools that ESP has managed and a list of any other schools managed by the ESP in the state.
- [ ] ESP financial records
- [ ] Maryland Certificate of Good Standing.
- [ ] Contact information

The services agreement as executed between the school and the ESP (or template version if not yet executed)

### c. Resource Management

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

Describe the criteria to be used to procure, allocate, use and maintain resources in the school.

### d. Resource Management Evaluation

1. Identify school goals and expectations and align these to the resources needed.
2. Demonstrate that the management plan has adequately planned for available resources and allocates these in the most efficient way possible.
3. Demonstrate the resource management process is linked to strategic and project planning.
4. Include an assessment process that will review the usage of allocated resources to make needed adjustments.
### APPLICATION COMPONENTS

**e. Student Records**

Student records provide a written picture of the academic performance of a child. Therefore, the orderly and complete maintenance of these records is necessary to ensure accurate information is available to plan for a child’s education. The Code of Maryland Regulations (COMAR) requires schools to have systems of information on enrollment, attendance, and promotion. The Student Record System must be used to initiate student records for each student entering Maryland public schools.

Each school is responsible for obtaining the required information in a manner that is most suitable to its own situation. The information that is recorded will be kept as a permanent record of the student and, therefore, must be accurate, readable, and current. Care should be taken to avoid the possibility of invading the privacy of both students and parents or guardian. Personal information needed from a parent should be obtained at the time of the registration. If it is not obtained at this time, personal information should be obtained in a later conference with the parent(s) or guardian(s).

1. Each school should develop and implement procedures to ensure that these data are collected and records maintained accurately in accordance with the guidelines set forth in Maryland Student Records Manual. A Records Management Plan for Schools addresses:
   - Physical storage of student records.
   - Clear definitions of ownership and responsibility for each type of student record.
   - Standards designed to physically protect the confidentiality of the total student record are in place.
   - Process for the release of student records.
   - Process for transferring and receiving of student records.
   - Process for retaining records at the end of the school year.

2. Describe the system for acquiring and maintaining student records as required by the district and in accordance with applicable laws. Who will be responsible for collecting, maintaining, and using student record information? How will this system be implemented and monitored for accuracy?

3. How will the records be secured while the student is enrolled at the school? Discuss how the school will comply with requests from parents or eligible students as pertains to the Family Educational Rights and Privacy Act (FERPA). How will the school ensure the confidentiality of these student records?

4. Describe the system for disseminating information about students as required by the district and in accordance with applicable laws.

5. If a student withdraws, what will be the policy for releasing records?

6. Describe the plan for ensuring that compliance requirements are monitored and met.

### f. Charter School Procedures

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

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

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

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

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

C3. Staffing and Human Resources

1. All employees of the public charter school are BCPS employees. There are no exceptions.
2. Exhibit a sound understanding of staffing needs that are aligned with the budget and with the school’s anticipated enrollment.
3. Provide a staffing plan that appears viable and adequate for effective implementation of proposed educational program.
4. Demonstrate a plan for the evaluation, retention and support of the teaching staff that is aligned with the State’s approach to incorporating student status and growth data in the evaluation and support of teachers; and present a plan that is reasonably likely to attract and retain effective staff.
5. Provides a roster of all charter school staff, identifying their proposed positions for each year of the charter. The roster should indicate and identify classroom teachers, any teaching aides or paraprofessionals, any specialty teachers, professional staff, and support personnel.
6. Details the methodology employed to determine job positions, roles, and responsibilities.
7. Provides job descriptions for each staff member identified on the roster.
8. Briefly describes the teaching program of typical teachers. Indicates how many hours they will be in the classroom and what other school-related responsibilities they will have outside the classroom (lunch duty, dismissal, advisory group, after-school activities, etc).
9. Provide information on volunteers or other non-employee individuals who might be engaged in assisting in the day-day-activities of the public charter school on a full- or part-time basis.
10. Describe personnel appraisal, evaluation, observation, and accountability procedures for all staff on roster.

C4. Recruitment, Employment, Retention

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

1. Describe the standards which you will use to recruit, hire, train, and retain highly qualified staff.
2. Describe the process to utilize the BCPS online applicant process SchoolSpring in recruiting all positions.
3. Describe the plan for utilizing the BCPS’ substitute teacher system.

C5. Payroll

1. Describe the plan for implementation of payroll processing according to BCPS procedures and negotiated agreements, including pay for supplemental activities.
2. Describe the human resources plan that will govern salaries, hiring, and dismissal and benefits packages.
### APPLICATION COMPONENTS

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Describe the plan to monitor and report employee leave.</td>
</tr>
<tr>
<td>4.</td>
<td>Describe the plan to adhere to court-ordered garnishment and levies.</td>
</tr>
</tbody>
</table>

#### C6. Certification

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Describe how the public charter school will assist BCPS in monitoring and encouraging certificated staff employed at the charter school to maintain and renew certification.</td>
</tr>
<tr>
<td>2.</td>
<td>Provide a detailed plan to adhere to the certification process and to fulfill certification requirements. Discuss process for addressing the requirements of conditionally-certified employees.</td>
</tr>
<tr>
<td>3.</td>
<td>Describe the charter school’s role in maintaining highly qualified staff at all levels of the public charter school.</td>
</tr>
<tr>
<td>4.</td>
<td>Describe how professional development will adhere to BCPS policy and will be offered to the teaching staff.</td>
</tr>
</tbody>
</table>

#### C7. Records Management

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Describe the charter schools records maintenance procedures including the process for ensuring that BCPS receives official personnel file documents. Describe procedures for handling employee records on location at the charter school site.</td>
</tr>
<tr>
<td>2.</td>
<td>Describe the process to share BCPS employee record changes such as name, address, dependents, marriage, birth, and adoption, with the Department of Human Resources.</td>
</tr>
<tr>
<td>3.</td>
<td>Describe the plan for working with BCPS to respond to court-ordered subpoenas for employee records.</td>
</tr>
<tr>
<td>4.</td>
<td>Provides information on the plan to house charter school’s copy of employee records and state which staff members will have access to these records and the rationale for such access.</td>
</tr>
</tbody>
</table>

#### C8. Waivers Needed to Support the Implementation of the Organizational Plan

A response that meets the standard:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Links areas of implementation that require flexibility and the waiver request of obtain this flexibility.</td>
</tr>
<tr>
<td>2.</td>
<td>Demonstrate a review and understanding of key documents that can create barriers for the successful implementation of their school design.</td>
</tr>
<tr>
<td>3.</td>
<td>Complete Appendix H for waiver application.</td>
</tr>
</tbody>
</table>

#### C9. Affiliations and Partnerships

A response that meets standard will:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Present a vision and strategy for community involvement that is reasonably likely to further the school’s mission and program.</td>
</tr>
<tr>
<td>2.</td>
<td>Provide evidence that anticipated partnerships are realistic and achievable.</td>
</tr>
<tr>
<td>3.</td>
<td>Include an outreach and marketing plan that demonstrates understanding of the community to be served and is likely to be effective in reaching families traditionally less informed about educational options.</td>
</tr>
</tbody>
</table>

### D. BUSINESS PLAN

#### D1. Budget

A response that meets the standard will:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Present budget priorities that are consistent with and support key parts of the plan, including the school’s mission, educational program, staffing and facility.</td>
</tr>
<tr>
<td>2.</td>
<td>Give balanced, evidence-based revenue and expenditure assumptions, including for any plan to incur and repay debt.</td>
</tr>
<tr>
<td>3.</td>
<td>Provide a budget narrative with sufficient information to fully understand how budgetary figures were determined.</td>
</tr>
</tbody>
</table>
4. Present viable strategies for meeting potential budget and cash flow challenges, particularly for the first year of operation.

5. Include a realistic assessment of protected sources of revenue and expenses that ensure the financial viability of the school.

6. Demonstrate a commitment to maintaining the financial viability of the school.

**Required Exhibits**

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

D2. Financial Management

A response that meets standard will:

1. Demonstrate understanding of the school’s financial management obligations.

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

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

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

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

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

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

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

9. Describe the method by which accounting records will be maintained.

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

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

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

D3. Facility

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

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

4. Present evidence to support facilities-related budget assumptions.

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

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

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

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

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

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

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

D4. Food Services
A response that meets the standard will:

1. Present a well thought-out food service plan designed to meet the needs of the school’s target population (only necessary for waiver applicants).

2. Demonstrate a well thought-out food service facility and equipment plan that will meet local and state requirements.

3. Demonstrate a clear understanding about the need to address national school lunch requirements for free and reduced meals such as the collection of applications for the program.


D5. Transportation
1. Present a thorough, realistic, and cost-effective transportation plan. Discuss the plans for transporting students to and from school. What arrangements, if any, will be made with the local school district, private providers, or with parents/guardians.

2. Provide specific evidence of third party readiness and terms for providing transportation services consistent with the school’s budget assumptions, 3rd party must collect required information (include in the application).

3. If the applicants have elected not to provide transportation, a response that meets standards will: Present a clear statement of the school’s intent not to provide transportation services.

4. Provide the definition of “reasonable distance” in the charter school transportation plan. since charter schools are responsible for providing transportation for students residing within a "reasonable distance" of the charter school. What factors helped form the basis for this distance determination?
5. Describe the policies which will help ensure that transportation is not a barrier to equal access for all students.

6. Describe the procedures that will be in place to address specific transportation modes that special education students with IEPs may require.

7. Describe viable transportation options for students.

8. Describe contingency plans for students requiring transportation due to a physical disability.

### D6. Insurance

A response that meets the standard will:

1. Provide evidence of ability and preparation to obtain liability insurance coverage.

2. Describe the insurance coverage the school will obtain general liability, property insurance and directors and officers liability coverage.

3. All insurance policies required shall be endorsed to provide that the policy is not subject to cancellation, nonrenewal, or material reduction in coverage until sixty (60) days prior written notice has been given to the district Board of Education.

4. No applicant will receive final approval to open until a description of the public charter school’s insurance coverage plans are provided, including health, general liability, property, and directors’ and officers’ liability coverage.

5. Approval of insurance will be granted only after submission to the Board of original certificates of insurance signed by authorized representatives of the insurers, or, at the Board’s request, certified copies of the required insurance policies. The required insurance shall be in force throughout the term of the charter school’s operations.

### Federal Grants

- The applicant is hereby notifying the authorizer of the intent to apply for the Charter School Program (CSP) sub-grant. The proposal for the grant (which includes this application as a main component of the proposal) will be submitted to the Maryland State Department of Education on: ____________.

- The applicant will not apply for the Charter School Program sub-grant.