**Neighborhood Advisory Council (NAC) Member**

**Evaluation Form**

***OPERATIONAL CAPACITY***

**Summer 2015**

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| **Name of Reviewer** |  |
| **Name of NAC** |  |
| **Name of Proposed School** |  |

**Neighborhood Advisory Council (NAC) Member Evaluation Form**

**INTRODUCTION**

Thank you for dedicating your time, effort, and expertise to help review proposals for new charter and contract schools submitted in response to the annual New Schools Request for Proposals (RFP). Through your participation in this review process, you will play an integral role in helping determine which proposed schools are recommended for approval to Chicago Public Schools’ (CPS) Board of Education.

**EVALUATION STANDARDS & RATINGS**

This evaluation form includes the evaluation criteria that you will use to rate the quality of the proposal response for your assigned sections. You will rate each evaluation criterion as “meets” or “does not meet” the standard according to the following guidelines:

**Meets the Standard –** The response reflects a thorough understanding of key issues and demonstrates the design team’s capacity to implement its plan. It addresses the topics with specific and accurate information, aligns with the mission and goals of the school, and presents a clear, realistic picture of how the school expects to operate.

**Does Not Meet the Standard –** The response does not demonstrate that the design team has the capacity to implement its plan. The response is incomplete, lacks meaningful detail or otherwise raises significant concerns about the viability of the plan or the applicant’s ability to carry it out.

Review each evaluation criterion in your assigned sections and rate the proposal as “meets” or “does not meet” the standard on that evaluation criterion. Strong responses will include all or most of the characteristics listed underneath the evaluation criterion (if applicable).

**SUPPORTING EVIDENCE**

For each rating, cite evidence from the proposal pertaining to your analysis of the section under the “Strengths” and “Concerns” sections. It is acceptable to rate an evaluation criterion as “meets” the standard overall but still cite some “concerns” in addition to “strengths;” conversely, it is acceptable to rate an evaluation criterion as “does not meet” the standard but also cite “strengths” in addition to “concerns.”

When citing evidence from the proposal, include page numbers for easy reference. If you have additional questions about that section of the proposal after reviewing the materials, include them in the “Key Questions” section.

**TWO-TIERED REVIEW**

Note that some sections are allowed updates in Tier 2: these sections are identified in the evaluation form as “\*\*May be updated with Tier 2 information” under the evaluation criterion. In these sections, you can choose to provide an initial rating of “meets” or “does not meet”, but may need to update this rating when Tier 2 materials have been received (August 10, 2015) and reviewed. However, you are encouraged to begin to cite evidence and/or include questions for these sections based on your review of the Tier 1 proposal materials.

If you have any questions as you are completing your review, do not hesitate to reach out to your NAC facilitator or Subject Matter Expert (SME) directly.

**Domain 1: PARENT AND COMMUNITY ENGAGEMENT AND SUPPORT**

***Key Question: Has the applicant conducted robust engagement and garnered authentic parent and community support, establishing a strong foundation for opening and operating a school with engaged and empowered families and communities?***

**\*\*All sub-sections in Domain 1 may be updated with Tier 2 information**

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| **Evaluation Criteria** | **1.1.a. Targeted Communit(ies):** The applicant has developed a nuanced understanding of the targeted communit(ies), informed by conversations with community members and a variety of methods of formal and informal research.\*\*May be updated with Tier 2 information |
| **A strong response that meets the standard will have all or most of the following characteristics:**  | * The applicant identifies the possible location(s) of the proposed school(s) and cites specific street boundaries where the school intends to focus student recruitment efforts, should the school be approved to open.
* The applicant provides the requested background information on the proposed target communit(ies) for all of the above metrics.
* The history of the targeted community is concise, includes key events from at least the last few decades, and identifies political, economic, demographic, and community-specific trends that are important to understand when seeking to serve students, families, and community members in the targeted communit(ies).
* The design team includes and/or has consulted with individuals with close ties to the community to become more familiar with the targeted communit(ies). The design team solicited advice from community members and participated in various meetings, events, and/or volunteer opportunities to help develop an outreach plan.
* The proposal explains how the design team received feedback from community members on the existing assets and educational and other support needs within the targeted communit(ies).
 |

**Select one and then provide support for the rating (to be selected in Tier 2):**

Top of Form

* Meets the Standard
* Does Not Meet the Standard

**Strengths:**

* Insert evidence here
* Insert evidence here

**Concerns:**

* Insert evidence here
* Insert evidence here

**Key questions:**

* Insert questions here
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| **Evaluation Criteria** | **1.1.b. Community Fit:** The educational vision for the proposed school has been adapted to reflect the unique assets and needs of the community. The proposal presents a compelling rationale for why the proposed school is a good fit for the community.\*\*May be updated with Tier 2 information |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The applicant received feedback from the community early in the process of developing an educational vision for their proposed school and/or determining how to adapt an existing model to meet the unique needs of the community.
* The proposal explains how the proposed school(s) would connect with and build upon existing assets in the targeted communit(ies), as well as help meet educational and/or support needs. The description includes a compelling rationale for why the proposed school(s) are a good fit for the communit(ies).
 |

**Select one and then provide support for the rating (to be selected in Tier 2):**

Top of Form

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**Strengths:**

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**Key questions:**

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| **Evaluation Criteria** | **1.2.a. Evidence of Notifying Key Community Stakeholders:** The applicant has conducted multiple methods of outreach. The community is generally aware of the proposed new school. Stakeholders understand how to review the proposal, volunteer to serve on a NAC, and submit public comment.\*\*May be updated with Tier 2 information  |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The applicant has notified at least an estimated 10 percent of individuals residing within the intended recruitment boundary of the proposed new school, as well as 50 percent of residents, organizations, and businesses located within a four-block radius of the proposed facilit(ies). All notification materials and methods include:
	+ Information on how individuals can provide feedback or ask questions about the proposed school
	+ (If distributed prior to Tier 1 proposal submission) A link to the CPS website where individuals can sign up to serve on Neighborhood Advisory Councils ([www.cps.edu/2014NAC](http://www.cps.edu/2014NAC))
	+ (If distributed between Tier 1 and 2 proposal submissions) Dates, times, and locations for the NAC Community Forum and Community Public Hearing
	+ A link to the CPS website where proposals will be publicly posted for review (www.cps.edu/2014RFP)
* In the proposal narrative and/or an attachment, the applicant provides evidence of having conducted all three methods of outreach to all of the aldermen, state representatives, and state senators in the intended recruitment boundary:
	+ Requesting a meeting (or listing meetings already held)
	+ Attending the elected officials’ ward or district nights
	+ Sending formal notification of the proposed new school
* The design team has met with key community organizations, businesses, and leaders from all of the targeted communities within their recruitment boundary to notify them of the proposed school.
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| **Evaluation Criteria** | **1.2.b. Seeking Community Feedback:** Through the process of consulting with community stakeholders, the applicant has continued to adapt the school model to more effectively serve its unique targeted student population.\*\*May be updated with Tier 2 information  |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The proposal presents evidence that community residents have attended community meetings hosted by the applicant. The community meetings offered attendees the opportunity to provide feedback on the educational vision for the proposed school.
* Applicants conducted canvassing and outreach efforts on the ground across the communities within the recruitment boundar(ies) to help refine their educational vision. The strategy for on-the-ground outreach is culturally sensitive, informative, and interactive.
* The proposal outlines key pieces of feedback received from different members of the community and explains which pieces of feedback were incorporated into plans for the proposed school, which were not, and why.
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| **Evaluation Criteria** | **1.3.a. Evidence of Support from Key Community Stakeholders:** The evidence of support presents a compelling case that students will choose to attend the school, and that community members believe the school will positively impact the community.\*\*May be updated with Tier 2 information  |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The proposal describes some of the key supporters and champions of the proposed school in the neighborhood, including parents or caregivers who may choose to enroll their students, and evidences the support with personalized letters outlining why the community members believe the proposed school will be an asset to the community.
* The proposal includes a sufficient number of letters of intent to enroll for age-eligible children to comprise at least half of the first-year enrollment capacity.
* The proposal cites and attaches any letters of support from elected officials within the recruitment boundary.
* There are community-based organizations, businesses, and/or leaders from the targeted communit(ies) within the recruitment boundaries who support the proposed school. The support of each organization is evidenced by a letter outlining the reasons for their support.
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| **Evaluation Criteria** | **1.3.b. Risk Factors:** The proposal openly acknowledges opposition to the proposed school.\*\*May be updated with Tier 2 information  |
| **A strong response that meets the standard will have all or most of the following characteristics:** |  |

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| **Evaluation Criteria** | **1.4.a. Continued Outreach Prior to School Opening:** The applicant's continued outreach and engagement strategy leading up to school opening will help ensure that the school successfully opens on time, ready to serve students and the community on day one.\*\*May be updated with Tier 2 information  |
| **A strong response that meets the standard will have all or most of the following characteristics:** |  |

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**Strengths:**

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| **Evaluation Criteria** | **1.4.b. Vision for Long-Term Collaboration with Parents and the Community:** The proposal presents a clear vision for how the school will develop a mutually beneficial relationship with the community, supported by ongoing dialogue and partnerships. \*\*May be updated with Tier 2 information  |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * As required by Illinois Charter Schools Law (105 ILCS 5/27A-7 a10), the proposal describes the nature and extent of parent and community involvement in the governance and operation of the charter school. If the governance plan does not include community member(s) and parent(s) on the Board, there are clear mechanism(s) for parents and community members to provide feedback and/or express an objection or concern to the school and Board on an ongoing basis.
* The applicant has secured partnerships with local community-based organizations, businesses, community groups, institutions of higher education, etc. that will support the students and families it intends to serve across the targeted communit(ies) within the recruitment boundary. These partnerships are evidenced by letters of support outlining the nature of the partnership. If any partnerships are integral to implementing the school model, the applicant includes a draft contract with specific scope of services outlined. The proposal cites who will be responsible for overseeing community partnerships.
* The proposal presents a clear vision for how the proposed school will positively contribute to the community, outlining any services, resources, programs, or volunteers that the school will offer to the families of students and/or community members.
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**Domain 3: OPERATIONAL CAPACITY**

***Key Question: Will the proposed operational and governance systems ensure that planning, spending, and accountability decisions support and prioritize student success?***

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| **Evaluation Criteria** | **3.1.a. Operational Plan:** The plans for student recruitment, school start-up, and operational supports will ensure that the school serves a diverse student population in a safe and secure environment.  |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The operational goals reflect the various stages of school development. The proposal clearly explains how metrics will be used to monitor operational progress and guide corrective actions, and cites which staff member(s) are responsible for overseeing school operations. ***Next Generation*** *blended learning proposals cite the Learning Management System(s) that will be used in the school, outline their purpose(s), and specify who is responsible for ensuring that the technology to support the blending learning program is fully operationalized.*
* The start-up plan is feasible and detailed. The start-up plan outlines specific tasks, designated task owners, and start and completion dates.
* The enrollment chart presents a realist plan for student enrollment targets that aligns with other relevant parts of the proposal, including the five-year budget, staffing plans, facility plans, etc.
* The student recruitment plan is detailed, realistic, aligned with the school mission, and likely to position the school to meet its enrollment targets in each year of five-year contract. The plan includes strategies to recruit and retain the targeted student population, as well as students with disabilities, students with Individualized Education Plans (IEPs), students who are English Language Learners (ELL), and students in at-risk situations, including (but not limited to) students who are homeless.
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**Select one and then provide support for the rating:**

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**Strengths:**

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**Concerns:**

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**Key questions:**

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| **Evaluation Criteria** | **3.1.b. Operational Compliance:** The proposal presents realistic plans to comply with legal requirements. |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * Application, enrollment, and registration policies are clear, accessible to all students and families, and in compliance with the Illinois Charter Schools Law.
* The transportation plan specifies how the school will identify the transportation needs of its student body, what supports and services the school will dedicate to meet student transportation needs, and which staff member(s) will be responsible for overseeing transportation services and supports. If transportation services and supports require funding, costs are included in the five-year budget.
* The Americans with Disabilities Act (ADA) compliance plan clearly articulates how the proposed school will ensure compliance with requirements under the ADA.
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**Key questions:**

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| **Evaluation Criteria** | **3.2.a. Governance:** The proposed governance plan clearly explains the roles and responsibilities of the Governing Board and outlines effective governance practices to ensure organizational viability. |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The governance plan clearly states the roles and responsibilities of each Governing Board officer position and each committee in written job descriptions. The governance plan outlines clear lines of authority to oversee the success and sustainability of a new public charter school. The attached bylaws state the governing body’s regular meeting schedule, the Board’s explicit powers and duties (as distinct from school leadership’s powers and duties), the responsibilities of committees, the process for Board growth and expansion, and Board terms and succession plans.
* The governance plan outlines formalized procedures for the Board to run effective, outcomes-focused meetings to monitor the school’s academic, financial, operational, and organizational progress on a consistent basis, including by setting clear goals, metrics, and rubrics for evaluation prior to the school year.
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**Key questions:**

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| **Evaluation Criteria** | **3.2.b. Board Composition, Development, and Evaluation:** The proposal outlines a plan to ensure that the Board will continually have or develop the necessary expertise to provide strong academic, financial, operational, and legal compliance oversight of the school.\*\*May be updated with Tier 2 information  |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The design team has identified qualified individuals to serve as the Board Chair and in most officer positions (at a minimum). At least one Founding Board member has close ties to the proposed community in which the school will locate. Individuals named on the Founding Board of Directors possess the diverse skills, experience, and backgrounds needed to develop and govern a successful, accountable, and compliant school. Each proposed Board member has completed the Board Member Form found in Appendix 5 and the Economic Interest Form found in Appendix 6. Proposed Board members display a robust understanding of the roles and responsibilities of Board members in providing academic, financial, operational, and legal oversight of the proposed charter school, both in the attached Board member forms and in person at the capacity interview.
* The proposal describes the qualifications of additional Board members who still need to be recruited. The desired composition of the Board reflects the skills, experiences, and qualifications needed to effectively support the school’s mission, vision, and educational philosophy and maintain academic, financial, and operational excellence.
* The proposal presents a viable plan to recruit Board members with diverse skillsets to serve on the founding Board prior to school opening and once in operation.
* Board selection processes are aligned with the mission, vision, and educational philosophy of the school and ensure that the Board will have the required expertise to provide rigorous academic, operational, and financial oversight of the proposed school.
* The proposal provides a clear plan for establishing the “working” Board in the planning year. There is a clear action plan that includes key decisions and any training that needs to occur prior to school opening.
* The proposal includes a Board development plan that clearly indicates how Board members will be trained and developed prior to school opening and on an ongoing basis to provide meaningful oversight and support.
* The proposal describes policies and procedures, as well as metrics and goals that the Board will utilize to evaluate its own effectiveness on at least an annual basis. There is a clear process in place to remove Board members if they are not meeting state expectations.
 |

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Top of Form

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**Strengths:**

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**Key questions:**

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| **Evaluation Criteria** | **3.2.c. Board Legal Compliance and Ethics Policies:** The policies establish clear guidelines for Board members and employees to comply with applicable laws and act in the highest ethical manner to preserve the public trust of residents and taxpayers. |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The proposed governance model complies with the Illinois Charter School Law, Open Meetings Act, and the Freedom of Information Act.
* The draft Ethics Policy holds the proposed school’s Board members, directors, officers, and employees to high standards of ethical conduct. At a minimum, the Ethics Policy provides guidance on the following topics:
	+ Nepotism
	+ Financial interests in contracts
	+ Gifts, loans, and favors
	+ Secondary employment
	+ Postemployment and post-membership restrictions
	+ Political activities
* The Conflict of Interest policy describes clear procedures to identify and address or mitigate any perceived or actual conflicts of interest among Board members, directors, officers, employees, agents, or family members. The formal Conflict of Interest Policy at a minimum:
	+ Provides a clear definition of a private interest, direct or indirect, in quantifiable terms (if financial in nature) for Board members, directors, officers, employees, agents, or family members;
	+ Establishes a clear policy and procedure to disclose conflicts of interest;
	+ Specifies procedures to address or mitigate a conflict of interest; and
	+ Provides a method to determine disciplinary or corrective actions if a conflict of interest fails to be disclosed for Board members, directors, officers, employees, agents, and others.
 |

**Select one and then provide support for the rating:**

Top of Form

* Meets the Standard
* Does Not Meet the Standard

**Strengths:**

* Insert evidence here
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**Concerns:**

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**Key questions:**

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| **Evaluation Criteria** | **3.2.d. Accountability:** The proposed organizational structure cites clear lines of authority, reporting, and accountability between the Board, staff, and any other related bodies or external organizations. |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The comprehensive organizational chart presents sensible and clear organization-level decision-making authority and delineates the respective roles and responsibilities of the Board, management organization, school administration, and any school advisory bodies or parent/teacher councils. The oversight structure appropriately distributes responsibilities and decision-making authority.
* The proposal includes mechanisms for holding network (if applicable) and school leaders accountable for school performance.
 |

**Select one and then provide support for the rating:**

Top of Form

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**Strengths:**

* Insert evidence here
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* Insert evidence here

**Key questions:**

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**Domain 5: MANAGEMENT ORGANIZATIONS (MOs)**

***Key Question: Does the proposal present a strong case that the MO will contribute to the overall success of the school and articulate appropriate oversight structures?***

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| **Evaluation Criteria** | **5.1.a. Historical Performance:** The MO has a strong record of opening, operating, monitoring, and supporting fiscally responsible and legally compliant schools. |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The proposal cites well-defined non-negotiables that will underlie school culture and academic outcomes. The non-negotiables align with the school's mission.
* In the case that any schools have been placed on fiscal probation, had their contract terminated, closed, or failed to open, the proposal clearly explains the circumstances of the incidents and how the MO responded to each situation. The proposal explains the details of any litigation or arbitration that has involved the MO.
* The proposal includes evidence of a thorough review of academic performance at all campuses. Interventions use robust, actionable improvement plans that include follow-up at both the school and organizational levels to address identified issues. Identified areas for improvement and associated action plans are aligned with the MO’s educational philosophy.
 |

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**Strengths:**

* Insert evidence here
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**Concerns:**

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* Insert evidence here

**Key questions:**

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| **Evaluation Criteria** | **5.1.b. Strategic Plan:** The MO presents a sound rationale and demonstrates the capacity to support growth in Chicago at this time. |
| **A strong response that meets the standard will have all or most of the following characteristics:** | * The proposal demonstrates a thoughtful approach to replication, which includes clearly-defined academic, operational, and financial benchmarks to guide replication decisions. The proposal specifies how the organization’s growth strategy would be modified if these benchmarks are not met, including contingency planning to address risks associated with changes to the proposed growth plan.
* The proposed growth plan is supported by sound rationale for the number of schools proposed, the rate of growth for the network, and the decision to expand into Chicago. The applicant lists all proposals pending or recently approved by other authorizers.
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**Select one and then provide support for the rating:**

Top of Form

* Meets the Standard
* Does Not Meet the Standard

**Strengths:**

* Insert evidence here
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**Concerns:**

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* Insert evidence here

**Key questions:**

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| **Evaluation Criteria** | **5.2.a. Selection:** The MO selection process and criteria reflect the school’s educational philosophy and include an assessment of the MO’s track record. |
| **A strong response that meets the standard will have all or most of the following characteristics:** |  |

**Select one and then provide support for the rating:**

Top of Form

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**Strengths:**

* Insert evidence here
* Insert evidence here

**Concerns:**

* Insert evidence here
* Insert evidence here

**Key questions:**

* Insert questions here
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| **Evaluation Criteria** | 5.2.b. Scope of Services: The proposal narrative and MO contract clearly articulate the relationship, roles, and responsibilities of the proposed school’s Board, the MO, and school administration and staff with regard to the terms of the contract. The draft MO contract clearly articulates:* The services to be provided by the MO,
* Compensation to be paid for those services,
* Financial controls and oversight,
* Methods of contract oversight and enforcements, and
* Conditions for contract renewal or termination.

In addition, the contract clearly:* Establishes the primacy of the charter contract over the MO contract;
* Identifies the proposed school’s Board as the party ultimately responsible for the school;
* Defines the MO as a service provider;
* Prohibits the third party from selecting, approving, employing, compensating, or serving as school Governing Board members;
* Requires the school Governing Board to select, retain, and compensate the school attorney, accountant, and audit firm;
* States that no MO staff shall be simultaneously employed by the charter school;
* Demonstrates the avoidance of conflicts of interest between the Board and MO; and
* Requires that all materials purchased with public funds are property of the school, not the MO.

Attachments with the MO’s most recent financial statements and federal tax returns are included for review. |
| **A strong response that meets the standard will have all or most of the following characteristics:** |  |

**Select one and then provide support for the rating:**

Top of Form

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**Strengths:**

* Insert evidence here
* Insert evidence here

**Concerns:**

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| **Evaluation Criteria** | 5.2.c. Monitoring: The MO monitoring process includes measurable performance indicators, identifies consequences if those indicators are not met, and outlines regular evaluation and scheduled renewal decision making by the school’s Board. The proposal clearly articulates the Board’s capacity to terminate the relationship if necessary and identifies contingency plans in the event the relationship is terminated. There are clearly defined financial controls governing the relationship with the MO. |
| **A strong response that meets the standard will have all or most of the following characteristics:** |  |

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* Insert evidence here
* Insert evidence here

**Concerns:**

* Insert evidence here
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* Insert questions here
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