

WASHINGTON STATE CHARTER SCHOOL COMMISSION

2015 RFP APPLICANT ORIENTATION

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March 17, 2015



WASHINGTON STATE
Charter School Commission

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2015 RFP Applicant Orientation

AGENDA:

- About the Commission
- The Charter Bargain & The New School Application Process
- Application Timeline Review
- Overview the Evaluation Process
- RFP Content & Expectations
- Question & Answer

2015 RFP APPLICANT ORIENTATION

ABOUT THE COMMISSION



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About the Commission

Established in April 2013, the Washington State Charter School Commission (Commission) is the state's only non-district and state-wide charter school authorizer. The Commission is governed by a nine-member board. The Governor, Lt. Governor and Speaker of the House each appoint three members, and each Commissioner serves for four years.

Led by Executive Director Joshua Halsey and guided by the Commission's Strategic Plan, the Commission staff leads the charter school applications process, manages the authorization work, provides support services and oversight to Washington State charter schools.

Currently, the Commission has authorized eight (8) charter schools across Washington State. The Commission accepts applications from any non-profit, public benefit corporation interested in starting a charter school in Washington State.

About the Commission

MISSION

To authorize high quality public charter schools and provide effective oversight and transparent accountability to improve educational outcomes for at-risk students.

VALUES

Student-Centered

Cultural and Community Responsiveness

Excellence and Continuous Learning

Accountability/Responsibility

Transparency

Innovation

VISION

Foster innovation and ensure excellence so that every student has access to and thrives in a high-quality public school.

2015 RFP APPLICANT ORIENTATION

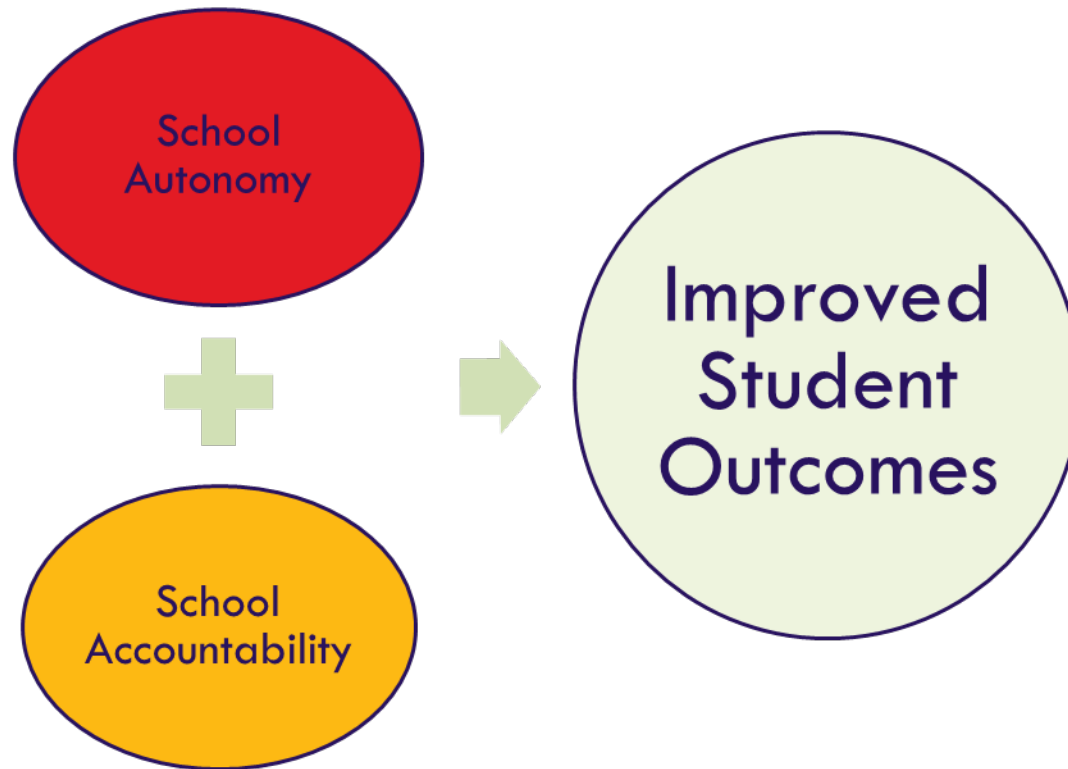
THE CHARTER BARGAIN & NEW SCHOOL APPLICATION PROCESS



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The Charter Bargain & New School Application Process


THE CHARTER BARGAIN



The Charter Bargain & New School Application Process

THE NEW SCHOOL APPLICATION PROCESS

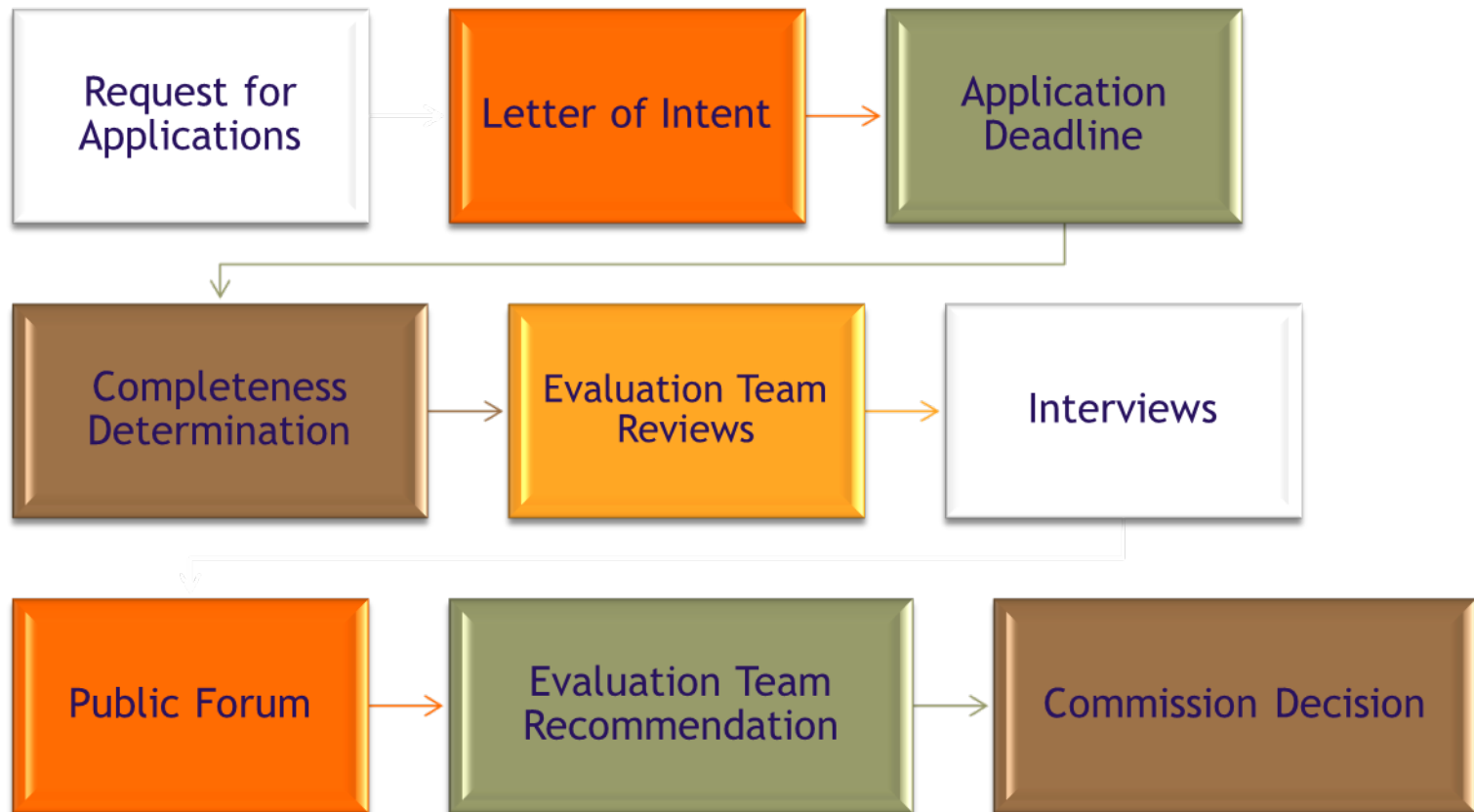
The purpose is to improve the educational options available to children and families by...



Approving only strong, demonstrably viable applications

The Charter Bargain & New School Application Process

APPLICATION STAGES



2015 RFP APPLICANT ORIENTATION

TIMELINE REVIEW



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Timeline Review

2015 REQUEST FOR PROPOSALS TIMELINE

| Date | Activity |
|---------------------------------------|--|
| February 13, 2015 | RFP Release |
| February 20, 2015 | Online Proposal portal launch. Proposals will only be accepted via upload to the Charter Tools online Proposal submission platform: http://apps.charter-tools.com/application |
| February 27, 2015 | Applicant questions and comments deadline |
| March 13, 2015 | Commission's written answers to questions issued |
| March 17, 2015 | Webinar session: This session will provide interested groups with information about the RFP content and process, including a demonstration of the online Proposal portal. Applicants will have the opportunity to ask questions during this orientation. |
| March 25 (Pasco) & 31 (Seattle), 2015 | RFP Orientation: An orientation designed to support prospective charter school applicants. The purpose of this full work-day orientation is to deepen understanding of: <ol style="list-style-type: none"> 1) The Commission's expectations as articulated in the RFP; 2) How applications will be evaluated; 3) The purpose and format of Public Forums; and 4) Changes that have occurred to the RFP since last cycle. |
| April 17, 2015 5:00 p.m. PDT | Notice of Intent to Apply (NOI) due |
| April 20, 2015 | Applicant complaints deadline |
| April 24, 2015 | Commission's written response to Complaints issued |
| May 15, 2015 5:00 p.m. PDT | Proposal deadline |
| May 20, 2015 | Completeness findings distributed |
| May 21, 2015 5:00 p.m. PDT | Deadline for corrections, only accepted via upload to http://apps.charter-tools.com/application |
| May 26, 2015 | Final completeness determinations distributed |
| June 1, 2015 5:00 p.m. PDT | Deadline for eligible Applicants to deliver hard copies of Proposals |

Timeline Review

2015 REQUEST FOR PROPOSALS TIMELINE CONTINUED

| Date | Activity |
|---|--|
| June 29-30 & July 1, 2015 | Capacity Interviews. Interviews will ONLY be held on these days; applicants are requested to keep the date entirely open in their calendars. Applicants will be notified of their assigned interview time as soon as possible. Due to significant logistical challenges, it is unlikely that any changes to assigned interview times will be possible. |
| July 20-31, 2015 | Public Forums |
| July 31, 2015 | Evaluation Team Recommendation Reports Released |
| July 31, 2015 5:00 p.m. PDT | Deadline for public comments regarding eligible Applicants |
| August 13, 2015 | Commission Resolution Meeting: Commission will pass resolutions approving or denying charter school applications. Applicants are invited to attend the Resolution Meeting where they will be allowed to provide a short presentation regarding their application and then engage in a question and answer session with Commissioners. |
| August 17, 2015 | Applicant request for optional debriefing due |
| August 17-28, 2015 | Optional Applicant debriefings |
| Within five business days of debriefing | Deadline for filing Protest |
| October 15, 2015 | Commission meeting for Contract approval/denial |
| November 11, 2015 | Deadline for final contracts to be signed |

Timeline Review

SUBMISSION REMINDERS

- Submissions must be uploaded through Charter Tools (online application system)
- Late/improperly formatted submissions will not be accepted
- Use the template documents provided
- All word limits must be followed. Proposals exceeding the stated word limits will be not be reviewed.

CHARTER TOOLS ONLINE APPLICATION PORTAL:

- <http://apps.charter-tools.com/>

2015 RFP APPLICANT ORIENTATION

EVALUATION PROCESS OVERVIEW



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Evaluation Process Overview

MISSION

To authorize high quality public charter schools and provide effective oversight and transparent accountability to improve educational outcomes for at-risk students.

VALUES

Student-Centered

Cultural and Community Responsiveness

Excellence and Continuous Learning

Accountability/Responsibility

Transparency

Innovation

VISION

Foster innovation and ensure excellence so that every student has access to and thrives in a high-quality public school.

Evaluation Process Overview

WSCSC STRATEGIC AUTHORIZING VISION

The Washington State Charter School Commission (The Commission) seeks to authorize high quality schools that will significantly improve student outcomes, particularly for at-risk students. The Commission will hold schools accountable for student learning using multiple measures of student achievement.

The Commission seeks to build a diverse portfolio of school delivery models that expand the authority of teachers and school leaders and encourage and accelerate the identification and use of best practices in teaching and learning. It also seeks to develop, test, and document innovative new ideas that can be replicated in other Washington schools.

The Commission expects schools to have authentic and sustainable connections to the communities they serve. These connections are evidenced by strong commitments from community and business stakeholders, systems for ensuring cultural sensitivity and responsiveness to all students and their families, and effective, engaged governance boards.

Evaluation Process Overview

- Evaluation Teams
- Rubric
- Capacity Interviews
- Public Forums
- Staff Recommendations
- Commission Decision

Evaluation Process Overview

THE EVALUATION PROCESS EMPLOYED BY THE COMMISSION WILL BE BOTH TRANSPARENT AND RIGOROUS. IT CONTAINS THE FOLLOWING KEY COMPONENTS:

EVALUATION TEAMS

- Comprised of members internal and external to the Commission including local Washington representation
- Content knowledge of different elements of the application, such as education, finance, governance and charter authorizing practices
- All evaluators will be trained/oriented to ensure consistent applications of evaluation standards
- All evaluators are screened for conflicts of interest

Evaluation Process Overview

EVALUATION TEAM COMPOSITION

Roles

- Commission staff will lead the evaluation teams
- WA evaluators
- National evaluators

Substantive Experience/Expertise

- Educational Programs
- Organizational Planning
- Financial/Business Planning
- WA Context

Evaluation Process Overview

EVALUATION TEAM STEPS

- Individual Review and Rate
- Team Panel Calls
- Capacity Interviews
- Recommendation to the Commission

Evaluation Process Overview

THE EVALUATION PROCESS EMPLOYED BY THE COMMISSION WILL BE BOTH TRANSPARENT AND RIGOROUS. IT CONTAINS THE FOLLOWING KEY COMPONENTS:

RUBRIC: New 4 point rubric this year

- Applicants should reference the rubric continually when preparing their proposal.
- The rubric serves as a guide to ensure all required elements have been addressed, as well as provide qualitative instruction about the standards for evaluation.
- Evaluators will utilize the rubric when reading and evaluating the application.

Evaluation Process Overview

RATINGS FOR EVALUATION: RFP Rubric

- 4 – Exceeds:** Thorough, compelling, sophisticated understanding of the concept
- 3 – Meets:** Clear and complete response to all aspects, demonstrates capacity
- 2 – Partially Meets:** Partial, insufficient details, some capacity
- 1 – Does not Meet:** Provides little or no evidence of capacity or understanding

Evaluation Process Overview

CAPACITY INTERVIEW

- Interview Purpose
- Interview Structure/Participation
- Logistics

Evaluation Process Overview

CAPACITY INTERVIEW PROCESS

A rigorous application process will include the opportunity for an in-person capacity interview with all applicants (120 minutes).

Purpose?

- Affords evaluators the opportunity to ask clarifying questions about the application
- Allows evaluation team to probe or pressure-test specific components of the application
- Gives authorizers the ability to assess the capacity of the founding team to implement the program proposed in the application

Evaluation Process Overview

CAPACITY INTERVIEW PROCESS

Structure/Participation:

- The Applicant Team (team members listed on the application cover sheet) are the participants that should attend the Capacity Interview.
- The Team Leader and members of the evaluation team will conduct the in-person interviews.
- Performance Task: The applicant team will be asked to respond to a prompt provided by the Commission.

Evaluation Process Overview

CAPACITY INTERVIEW PROCESS

Logistics:

- June 29-30 & July 1
- Puget Sound Educational Service District in Renton, Washington.
- Applicant invite and specific guidance sent closer to dates
- 120 minutes
- No presentations or printed materials from the applicant are allowed
- You may bring a copy of your application and any notes you may want to have on hand. (Please do not bring any new support documents. They will not be accepted.)

Evaluation Process Overview

THE EVALUATION PROCESS EMPLOYED BY THE COMMISSION WILL BE BOTH TRANSPARENT AND RIGOROUS. IT CONTAINS THE FOLLOWING KEY COMPONENTS:

PUBLIC FORUM

- Designed to provide an opportunity for parents, community members, local residents and school district board members and staff to learn about and provide input on each application.
- Public Forums are a required component of the application process (RCW 28A.710.140). Applicants must attend their public forum.
- The Commission coordinates the conduct of these forums
- July 20-31, 2015
- Applicant invite and specific guidance sent closer to dates

Evaluation Process Overview

DUE DILIGENCE

Due diligence must be part of any rigorous evaluation process. There are few specific guidelines for due diligence, though it may be employed to verify assertions made in the application.

Examples of Due Diligence

- Verify background of applicant team and board members
- Research/verify track records of other schools or entities with which applicants have been involved or managed
- Research/verify partnerships disclosed in application
- Between May 15th and June 30th
- An external evaluator, (NACSA) will conduct the due diligence.

Evaluation Process Overview

EVALUATION RESULTS

- Recommendation to the Commission
- Analysis of strengths/concerns

WHAT THE EVALUATION IS *NOT*:

- A decision
- A preference for one quality application over another

2015 RFP APPLICANT ORIENTATION

RFP CONTENT & EXPECTATIONS



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RFP Content & Expectations

KEY CATEGORIES OF THE APPLICATION

- Executive Summary
- Educational Program Design & Capacity
- Operations Plan & Capacity
- Financial Plan & Management Capacity

As applicable:

- Existing Operators (CMO/Network Replication)

Educational Program Design & Capacity

EDUCATIONAL PROGRAM DESIGN & CAPACITY

The Educational Program section should provide a complete description of the school's educational philosophy and methodologies.

This is where the applicant provides the Education Program Terms including the essential design elements of the school model, the research-based and/or other evidence that promises success for this program with the anticipated student population, the instructional methods, assessment strategies and culturally responsive aspects of the program. It should also include information about how the school will assess the success of its program.

Educational Program Design & Capacity

CRITERIA TO INCLUDE (PROGRAM DESIGN):

- Education Program Terms
- Curriculum and Instructional Design
- Student Performance Standards
- Graduation Requirements (HS only)
- School Calendar/Schedule
- School Culture
- Supplemental Programming
- Special Populations and At-Risk Students
- Student Recruitment/Enrollment
- Student Discipline Policy and Plan
- Conversion Schools (as applicable)
- Family/Community Involvement

Educational Program Design & Capacity

EDUCATIONAL PROGRAM CAPACITY (Criteria to address):

- Key members of school leadership team and their qualifications
- Ties to and/or knowledge of the target community
- Existing or proposed partnerships
- Head of School candidate or plans for recruitment

Operations Plan & Capacity

OPERATIONS PLAN & CAPACITY

The Operations plan provides information about the school's legal status, governance structure, and other plans for how the school plans to open successfully on day 1 and maintain stability and growth over the term of the charter.

Operations Plan & Capacity

CRITERIA TO INCLUDE (DESIGN):

- Legal Status and Governing Documents
- Organizational Structure and Relationships
- Governing board
- Advisory Bodies
- Grievance/Complaint Process
- District Partnerships
- Education Service Providers
- Staffing Structure
- Staffing Plans, Hiring, Management and Evaluation
- Professional Development
- Performance Framework
- Facilities
- Start-Up and Ongoing Operations
- Operations Capacity

Financial Plan & Capacity

FINANCIAL PLAN & CAPACITY:

The Financial plan section should provide information that allows the authorizer to assess the fiscal viability of the school. It will demonstrate not only a balanced budget but a financial management plan that will support the mission and programming of the school.

Financial Plan & Capacity

CRITERIA TO INCLUDE:

Financial Plan

- The systems, policies, and processes for financial planning, accounting, purchasing, and payroll, also establishing and maintaining strong internal controls that ensure compliance
- Roles and responsibilities of the school's administration and governing board
- Plans and procedures for audit
- Financial transparency
- Services to be contracted
- Financial Management
- Insurance
- Completed Financial Plan Workbook
- Detailed budget narrative including description of assumptions and revenue estimates,
- Year one cash flow contingencies

Financial Plan & Capacity

CRITERIA TO INCLUDE:

Financial Management Capacity

- Applicant team's individual and collective qualifications for implementing the Financial Plan successfully, including capacity in areas such as the following: Financial management; Fundraising and development; and Accounting and internal controls.
- The most recent internal financial statements (balance sheets, income statements)
- The last three years of independent financial audit reports and management letters; and the most recent internal financial statements

Existing Operators

Applicants who already operate one or more schools:

- Detailed description of the organization's growth plans and capacity to successfully support and execute its plan including business plans to support anticipated growth
- Portfolio Summary Template
- A status report regarding compliance with each preopening condition (for applicants authorized to open a school in the 2015 school year and beyond)
- Disclose any schools that have been closed or non-renewed, or charters that have been revoked by any authorizer.

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QUESTION AND ANSWER



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Resources

WASHINGTON STATE CHARTER SCHOOL COMMISSION WEBSITE:

- Main Page: <http://charterschool.wa.gov/>
- Application Updates: <http://charterschool.wa.gov/applying/application-updates/>
- Application Process: <http://charterschool.wa.gov/applying/application-process/>
- Application Materials: <http://charterschool.wa.gov/applying/application-materials/>
- Application Archive: <http://charterschool.wa.gov/applying/application-archive/>

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