Bend-La Pine Schools
Charter School Application

Introduction

Bend-La Pine Schools accepts proposals for high-quality charter schools seeking to open in the 2018-19 school year or thereafter. The district is charged with approving quality charter proposals that meet identified educational needs and promote a diversity of educational choices, and declining to approve weak or inadequate charter proposals.

To support Bend-La Pine Schools in achieving its strategic goals, the district specifically seeks proposals that
1. Close achievement and opportunity gaps for historically underserved students;
2. Raise the student achievement for historically underserved students; and/or
3. Increase graduation and post-secondary enrollment rates.
4. Other types of priorities might relate to geographic or programmatic needs within the district, such as STEM, high schools, alternative schools, etc.

The application should also support at least one of the Legislative goals for public charter schools:
1. Increase student learning and achievement;
2. Increase choices of learning opportunities for students;
3. Better meet individual student academic needs and interests;
4. Build stronger working relationships among educators, parents and other community members;
5. Encourage the use of different and innovative learning methods;
6. Provide opportunities in small learning environments for flexibility and innovation, which may be applied, if proven effective, to other public schools;
7. Create new professional opportunities for teachers;
8. Establish additional forms of accountability for schools; and
9. Create innovative measurement tools.

All new charter schools approved through this process will be public schools subject to the legal requirements set forth in Oregon charter law, Oregon Revised Statutes (ORS) § 338.

Application Process

Applicant Types

Applicants will be considered in four major types, each of which has specific requirements. Applicants may fall into multiple categories simultaneously and must meet requirements for all applicable categories. All applicants must meet all proposal requirements in ORS § 338.045, as well as the evaluation criteria in ORS § 338.055.

New Operators are nonprofit organizations or single-school districts which
- Have never operated a charter school OR currently operate a charter school that has been open for less than one school year (regardless of location);
- Do not intend to employ an educational service provider OR intend to employ an educational service provider that has not operated a school (regardless of location).

New Operators must complete all of the main application questions and, as appropriate, the Conversion Schools Addendum.

Existing Operators are nonprofit organizations or single-school districts which currently
- Have one or more schools in operation nationwide or have previously had one or more schools in operation; OR
- Intend to employ an educational service provider with one or more schools in operation or have previously had one or more schools in operation.

Existing Operators must complete all of the main application questions, plus the Existing Operators Addendum and, as appropriate, the Education Service Provider and Conversion Addenda.

Conversion Applicants are nonprofit organizations or single-school districts, either new operators or existing operators, which propose to convert an existing traditional public school to charter status. Conversion Applicants must complete all of the main application questions, plus the Conversion Schools Addendum and, as appropriate, the Existing Operators and Education Service Provider Addenda.

Virtual and Distance Applicants are nonprofit organizations or single-school districts, either new operators or existing operators, which propose to operate a school where students primarily participate at a distance from different locations (OAR 581-026-0300). Virtual and Distance Applicants must complete all of the main application questions and may also need to respond to additional prompts or legal citations throughout the application and in the evaluation criteria. Virtual applicants should ensure that their applications thoroughly address the nuances and differences between virtual and brick-and-mortar education and should not take for granted evaluators' knowledge of virtual education or its trust of the applicants' knowledge. Virtual and Distance education can be particularly difficult, especially from a student services and funding perspective, and the onus is on applicants to prove that they have planned thoroughly and are prepared to open and operate a high-quality virtual or distance charter school. For each application question, consider answering it through the lens of, "in the virtual or distance setting." Virtual Applicants should also refer to ORS § 338.120 and ensure that their applications address all requirements specific to virtual charter schools, in addition to the general charter school proposal requirements in ORS § 338.045 and evaluation criteria in ORS § 338.055.

Evaluation Process

The charter school proposal evaluation process includes two primary stages of review, summarized below. Applicants also have several opportunities for appeal if denied at either of these stages. Appeals are not explicitly described in this document, but applicants may find additional information in ORS § 338 or the State Board of Education's Guide to Charter School Appeals and Mediation.

Stage 1: Completeness Checks

All proposals will be reviewed for completeness before they are distributed to evaluators. If a proposal is incomplete/incorrectly formatted, the applicant will have an opportunity to rectify issues and resubmit their proposal. Proposals deemed incomplete will not be eligible to proceed to Stage 2 Evaluation.

Stage 2: Evaluation Team Review
Teams of evaluators will evaluate each proposal and discuss their findings based on the submitted application. They will then make a recommendation to the superintendent, who will in turn make a recommendation to the school board. Applicants will have the opportunity for a public hearing regarding their application, and the school board will vote to approve or not approve the charter application. Applicants will receive a copy of the superintendent's recommendation and, should the application be denied, will have an opportunity to appeal the district's decision. (See ORS § 338 for more information on appeals.)

Application Process Timeline

Letter of Intent

Launch of Application

District Application Cycle

Charter applications that include grades 9-12 may be submitted ONLY on odd-numbered years. Examples include 9-12, 6-12, and K-12 schools. On even-numbered years, ONLY applications for charters that do not include grades 9-12 may be submitted. Examples include K-5, K-6, K-8, and 6-8 schools, for example.

Prospective Applicant Informational Session (dates vary but will be posted on district website)

This information session will provide those interested in applying for a charter in this cycle with an overview of the process, a review of the application, and an opportunity to have questions answered.

Deadline for Letter of Intent: May 1, 5:00 p.m.

All interested parties must submit a Letter of Intent (LOI) and accompanying eligibility documentation. This letter may be submitted electronically or by post, but it must be received at the district by 5:00 p.m. on May 1.

Stage 1: Completeness Check

Deadline for Complete Proposals: July 15, 5:00 p.m.

All proposals must be submitted in complete and final form by this date. Proposals determined to be incomplete as described below will be disqualified from this cycle.

Initial Completeness Findings Distributed
Proposals will be reviewed for completeness within 30 days of receipt. If a proposal is incomplete and/or incorrectly formatted, the applicant will have ten business days to rectify issues and resubmit the proposal.

Completeness Remedy / Resubmission Deadline
Applicants who do not respond by this deadline will be disqualified from this cycle.

Final Completeness Findings Distributed
Applicants failing to satisfactorily rectify identified completeness issues within the allotted time will be disqualified from this cycle. Disqualified applicants should consult ORS § 338 for information on appealing the decision.

Stage 2: Team Review and Superintendent's Recommendation

Evaluation Team Proposal Review
Evaluation teams will review each proposal. If the proposal is deemed complete, the district will host a public hearing within 60 business days.

Public Hearing
Within 30 days, after the public hearing, the School Board will vote to approve or deny the proposal.

District Proposal Decisions
Denied applicants should consult ORS § 338 or the State Board of Education's Guide to Charter School Appeals and Mediation for information on appealing the decision.

Instructions

Components of the Proposal

- Narrative Proposal: The proposal, the formal application to Bend-La Pine Schools, is a comprehensive description of the school's educational, operational, and financial plans.
- Attachments: Throughout the proposal, specific documents are requested in addition to narrative answers. Attachments may not contain additional narrative unless specified. A comprehensive list of the attachments is provided in these instructions.

Specifications

- Applicants MUST submit a hard copy and an electronic copy on a thumb drive of the proposal to the district office. Applicants MUST also submit an electronic copy to the Oregon Department of Education. The applicant must use the following templates:
  - Proposal Coversheet Template / Enrollment Projection Template - ALL APPLICANTS (MS Word)
  - Curriculum Summary Template - ALL APPLICANTS (MS Word)
  - Financial Plan Workbook (no template available) - ALL APPLICANTS (MS Excel)

- All templates are available on Bend-La Pine School's website.

- All elements of the proposal must be typed with 1-inch page margins and 12-point font, single-spaced.

- Each major section of the proposal (School Summary, Educational Program, etc.) and each addendum must begin on a separate page, as indicated in the template document. **Adhere to all page limits as indicated.**

- If you believe a particular question does not apply to your team or proposal, respond "Not Applicable," AND state the reason this question is not applicable to your team or proposal.

- All required documents should be submitted in the file format specified.

- Late or incorrectly formatted submissions will not be accepted.

- When submitting resumes and biographies, label each document with the individual's affiliation with the proposed school (board member, principal, teacher, etc.).

- Review all elements of your proposal for completeness before submitting.

- All proposals will be reviewed for completeness before they are accepted and distributed to evaluation teams. If a proposal is found to be incomplete or incorrectly formatted, the applicants will have ten business days to satisfactorily rectify the identified issues and resubmit their proposal. Applicants failing to rectify identified issues within the allotted time will not be evaluated in this cycle.

- The following is a list of attachments to accompany the proposal. Note that not all attachments will be applicable for all applicants. It is the responsibility of the applicant to ensure they submit all attachments required for their proposal. Do not upload documents for any attachment that is not applicable. Additional attachments are required for various addenda.

New Operators	Exsisting Operators	Conversion Applicants

1. School-wide curriculum description
2. Summary scope and sequence
3. Curriculum map
4. Learning standards
5. Calendar and schedules
6. Enrollment policy
7. Discipline policy
8. Evidence of community support/demand
9. School leader qualifications
10. Leadership team qualifications
11. Organizational charts
12. Board documents
13. Board member information
14. Staffing chart
15. Personnel policies
16. Supplemental teacher or administrator evaluation tools
17. Facility commitment and description
18. Start-up plan
19. Financial plan workbook
20. Budget narrative
 	
ONLY if proposing to use an Education Service Provider:
Addendum 1: For proposals from applicants (new or existing) using EDUCATION SERVICE PROVIDERS
  • Attachment ESP-1: ESP audited financial statements and annual report
  • Attachment ESP-2: ESP contract
	1. School-wide curriculum description
	2. Summary scope and sequence
	3. Curriculum map
	4. Learning standards
	5. Calendar and schedules
	6. Enrollment policy
	7. Discipline policy
	8. Evidence of community support/demand
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	14. Staffing chart
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	16. Supplemental teacher or administrator evaluation tools
	17. Facility commitment and description
	18. Start-up plan
	19. Financial plan workbook
	20. Budget narrative
	
	Addendum 3: For EXISTING OPERATOR proposals
	  • Attachment EO-1: Business plan and last two years of organization's annual reports
	  • Attachment EO-2: Years 1, 3, and 5 network organizational charts
	  • Attachment EO-3: Network-level budget
	  • Attachment EO-4: Network-level budget narrative
	  • Attachment EO-5: Existing schools information template
	  • Attachment EO-6: Internal financial statements for the organization and related business entities
	  • Attachment EO-7: Last three years of audit reports and management letters for the organization and related business entities
	  • Attachment EO-8: Information on past or current litigation
	
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	Addendum 1: For proposals from applicants (new or existing) using EDUCATION SERVICE PROVIDERS
	  • Attachment ESP-1: ESP audited financial statements and annual report
	  • Attachment ESP-2: ESP contract
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		2. Summary scope and sequence
		3. Curriculum map
		4. Learning standards
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		15. Personnel policies
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		17. Facility commitment and description
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		Addendum 1: Conversion Schools
		
		ONLY if proposing to use an Education Service Provider:
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		  • Attachment ESP-1: ESP audited financial statements and annual report
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Applicant Code of Conduct

Members of the Bend-La Pine School Board are obligated to make decisions in the best interests of children, free from personal or political influences. Similarly, charter school applicants have the responsibility of respecting and upholding the integrity of the charter school proposal process.

Specifically, charter school applicants shall not

- Initiate, or attempt to initiate, any activity with a Bend-La Pine School Board member, with the exception of the introductory information meeting and the public hearing;
- Direct any communications, including proposal documents, to a School Board member.

Charter school applicants found to be in violation of these requirements may be deemed ineligible for consideration in this year's proposal process.

Public Disclosure

All charter school proposal materials submitted to the district become public records.

Directions:

Please submit an application that addresses the following questions / issues. There are no page limits for individual sections except for the School Summary, Attachments, and Addenda. The total narrative response may not exceed 60 pages (not including the requested attachments and addenda).

Please keep in mind that your application is a professional document. The quality of the document that you submit should reflect the quality of the school that you propose to open. Evaluation teams will be able to navigate well-organized, effectively edited documents easily, thereby focusing their energy on reviewing the content of each application. Grammar, spelling, and formatting all make an impression on an evaluator.

All applicants must complete the primary application. Applicants should complete any addenda as appropriate.

Plagiarism

Individuals and groups seeking the right and responsibility to educate public school children at public expense are considered public officials and should be accountable to the highest standards of academic integrity. The district considers plagiarism, including the copying of language from any other charter application without proper attribution, as concerning ethical behavior which may influence the evaluation of the proposal.

The district is cognizant that in order to implement an existing curriculum, instructional framework, or educational model (e.g. Montessori, arts integration, project-based learning, blended learning, etc.) with fidelity, key concepts must be discussed. However, it is not acceptable to copy and paste this discussion or description from another source. A high-quality applicant team with the capacity to operate a high-quality school must be able to thoughtfully explain in their own words how they intend to educate children. Bend-La Pine Schools also understands that existing operators proposing to replicate a model may use their own intellectual property, which is appropriate and acceptable.

Proposal Cover Sheet / Enrollment Projection Template

Applicant Information   *COMPLETE THIS PAGE ONLY ONCE REGARDLESS OF THE NUMBER OF SCHOOLS PROPOSED.*

Name of applicant organization (ORS § 338.045.2.a): _____

Primary contact person: _____

Mailing address:

Street/PO Box: _____

City: _____ *State:* _____ *Zip:* _____

Phone Number: *Day:* _____   *Evening:* _____

Email: _____

Names, roles, and current employment of all persons on applicant team and governing board (*add lines as needed*):

Full Name	Current Job Title and Employer	Position with Proposed School

Do any of the following describe your organization, or the school/campuses proposed here?

☐ Seeks approval for multiple campuses under a single charter.

☐ Already operates schools elsewhere in the US.

☐ Will contract or partner with an education service provider. *If yes, include the provider's portfolio in answering the below questions regarding pending applications and school openings.*

If so, identify the provider:

☐ This provider already operates schools in this state or elsewhere in the US.

NOTE: If the applicant meets the definition of an existing operator, the applicant must complete the existing operator addendum. If the applicant intends to contract with a third-party education service provider (ESP), the applicant must complete the addendum for Education Service Providers. An ESP is any third-party entity that provides comprehensive education management services to a school via contract with the school's governing board.

Does this applicant team have charter school applications under consideration by any other authorizer(s) in the United States?   ☐ Yes   ☐ No   *If yes, complete the table below, adding lines as needed.*

State	Authorizer	Proposed School Name	Application Due Date	Decision Date

Does this applicant team have new schools or campuses scheduled to open in the United States in the next two school years?   ☐ Yes   ☐ No   *If yes, complete the table below, adding lines as needed.*

Planned School Name	City	State	Opening Date

Does this applicant team have new schools or campuses approved but scheduled to open more than two years out?   ☐ Yes   ☐ No   *If yes, complete the table below, adding lines as needed.*

Authorizer	# of Schools	City(s)	State

Has this applicant team operated or been affiliated with other charter schools that have either closed or discontinued work with the applicant team or its affiliated organizations?

☐ Yes ☐ No *If yes, complete the table below, adding lines as needed.*

School Name	Authorizer	City(s)	State

School Information

COMPLETE THIS PART FOR EACH SCHOOL/CAMPUS INCLUDED IN THIS PROPOSAL. Duplicate as needed.

Proposed School/Campus Name (ORS § 338.045.2.b)	Grades served: Year one	Grades served: capacity

Proposed Location	
Geographic Community: *Identification of Geographic Community may be as specific as a neighborhood or as general as the targeted city or school district*	
Address of identified facility *if applicable*: **(ORS § 338.045.2.j)**	

Projected Demographic Information	%FRL:	%SpEd:	%ELL:

Model/Specialty *(check all that apply)*

☐ Alternative   ☐ Career and Technical Education   ☐ Disability (*list*):   ☐ Montessori
☐ Arts   ☐ College Prep   ☐ Language Immersion   ☐ STEM
☐ Blended Learning   ☐ Other (*list*):   ☐ Military

Proposed Principal/Head of School *(if known)*

Name of proposed candidate: _____   **Current employment:** _____

Phone Number: *Day:* _____   *Evening:* _____

Email: _____

Proposed Charter Term (ORS) § 338.045.2.u). State the proposed term of the charter.

Starting Month/Year	Ending Month/Year	Total Number of Years

Campus Enrollment Projection

Academic Year (specify for each year)	Planned # of Students	Maximum # of Students	Grade Levels Served
Year one			
Year two			
Year three			
Year four			
Year five			
At Capacity			

Legal Compliance (ORS § 338.045.2.I). The Applicant assures the school's compliance with all statutes and rules that shall apply to the public charter school.

_____   _____

Signature   Date

_____   _____

Printed Name   Position

School Overview

Executive Summary Narrative (Limit 2 Pages)

The Executive Summary should provide a concise overview of: the proposed plan for the school; the outcomes you expect to achieve; the geographic and population considerations of the school environment; the challenges particular to those considerations; and the applicant team's capacity to successfully open and operate a high quality school given the above considerations.

1. **Philosophy/Mission and Vision (ORS § 338.045.2.c**). State the philosophy/mission and vision of the proposed school. The mission is a statement of the fundamental purpose of the school, describing why it exists. The vision statement describes how the school will operate and what success looks like for students. The mission and vision statement provide the foundation for the entire proposal, and taken together, should identify the students and community to be served and illustrate what success for students will look like.

2. **Educational Need and Targeted Student Population (ORS § 338.045.2.h).** Describe the targeted student population the charter school will be designed to serve, students' anticipated educational needs, and non-academic challenges the school is likely to encounter. Describe the rationale for selecting the location and targeting this student population.

3. **Education Plan/School Design (ORS § 338.045.2.i).** Provide an overview of the education program of the proposed school, including major instructional methods, assessment strategies and non-negotiables of the school model. Include a description of any distinctive learning or teaching techniques to be used in the public charter school. Describe the evidence that demonstrates the school model will be successful in improving academic achievement for the targeted student population. Summarize what the proposed school would do more effectively than the schools that are now serving the targeted population and how the school would achieve its goals.

4. **Community Engagement (ORS § 338.045.2.t).** Describe the relationships that you have established to generate community engagement in and support for the proposed school and how you have assessed demand and/or solicited support for the school. Briefly describe activities to date and summarize their results. Describe how you plan to continue this community engagement in order to ensure expanded opportunities for students, parents, and community members.

5. **Leadership and Governance (ORS § 338.045.2.f).** List the current members of the school's proposed leadership team and governing board, including their roles with the school and their current professional affiliation.

Enrollment Summary (Limit 2 Pages)

1. **Enrollment Summary (ORS § 338.045.2.g).** Complete the table below, illustrating the projected enrollment and growth plan for the school. Indicate the school year for each column
   Remove any rows for grades the school will not serve.

Grade Level	Number of Students					
	Year 1 20__	Year 2 20__	Year 3 20__	Year 4 20__	Year 5 20__	Capacity 20__
Pre-K						
K						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
TOTAL						

2. **Enrollment/Growth Rationale.** Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan illustrated above.

Application Questions

Section 1: Educational Program Design & Capacity

Program Overview (ORS § 338.045.2.d,i)

1. Summarize the education program and any non-negotiable elements of the school model, including any distinctive learning or teaching techniques to be used. Briefly describe the evidence that promises success for this program with the anticipated student population.

Curriculum and Instructional Design (ORS § 338.045.2.d,i)

1. Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.

2. Give an overview of the planned curriculum, addressing alignment with Oregon's state standards as required by ORS 338.115(i).

   a. If the curriculum is fully developed, summarize curricular choices (e.g. text book or computer-based curricula selection) by subject, and the rationale for each. Describe the evidence that these curricula will be appropriate and effective for the targeted students. Provide in **Attachment 1** a school-wide curriculum description table. *See Exhibit A for an exemplar. Your curriculum summary table may be no longer than one page per grade level and must be prepared in 12- point font with 1- inch margins.*

      -OR-

      If the curriculum is not already developed, instead explain the plan for how the curriculum will be developed between approval of the proposal and the opening of the school, and instead provide in **Attachment 1**, a curriculum development timeline, identifying milestones, individuals responsible for included tasks, and projected key completion dates.

   b. Provide as **Attachment 2** a summary of the scope and sequence of the curriculum for all grades you propose to serve, including core academic as well as non-academic classes. *See Exhibit B for an exemplar. Regardless of the number of grades served, your summary scope and sequence may not be longer than two pages per grade and must be prepared in 12-point font with 1- inch margins.*

   c. Provide, as **Attachment 3** a curriculum map for one core academic subject for one grade the school will serve in year one. The curriculum map should identify course outcomes and demonstrate a clear alignment with appropriate state standards. *See Exhibit C for an exemplar.*

3. Describe the primary instructional strategies that the school will expect teachers to use and why they are well suited for the anticipated student population. Describe the methods and systems teachers will have for providing differentiated instruction to meet the needs of all students, including students working above and below grade level.

4. For virtual schools, describe the plan to provide equitable access to the education program of the school by ensuring that each student is able to access the curriculum and instruction in compliance with ORS § 338.120.h-i. Also describe what opportunities the school will provide and how students will interact both virtually and in person with other students, teachers, administrators, and other employees in the school for instruction, feedback, socialization, extracurricular activities, conferences, or other purposes in compliance with ORS § 338.120.j-l.

5. Describe how the school will ensure teachers employ culturally responsive instructional practices appropriate and effective for the targeted students. Provide a description of the specific training and support staff will receive on an ongoing basis.

6. Describe how the school will meet all requirements of the Every Student Succeeds Act (ESSA), or other relevant federal requirements.

Pupil Performance Standards (ORS § 338.045.2.e)

1. Describe the pupil performance standards for the school as a whole.

2. In **Attachment 4**, explain if the school has, or will adopt or develop, additional academic standards beyond those mandated by the state. Explain the types of standards (content areas, grade levels), and provide a complete set of any additional learning standards already adopted. Describe the adoption or development process. Select one grade level and subject area as an example, and explain how these additional standards exceed requirements.

3. Provide, also in **Attachment 4**, the school's exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do.

High School Graduation Requirements (ORS § 338.045.2.e)

For schools serving grades 9-12 only.

1. Describe how the school will meet the graduation (exit) requirements described in **Attachment 4**. Explain how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements will exceed state and district standards, explain the additional requirements.

2. Explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (e.g. trade school, military service, or entering the workforce).

3. Discuss the systems and structures the school will implement for students at risk of dropping out or not meeting these requirements.

Performance Management (ORS § 338.045.2.e)

1. Explain the plan for using internal and external assessments at all relevant grade levels to measure and report progress in meeting district standards and/or the stated goals of the proposed charter school. Specifically, describe how will this plan will address the following key areas on which charter schools will be evaluated:
   a. student academic proficiency and growth;
   b. achievement gaps in both proficiency and growth between major student subgroups;
   c. attendance (including how the school will track attendance, particularly for virtual and distance schools);
   d. recurrent enrollment from year to year;
   e. in-school and out-of-school suspension rates and expulsion rates;
   f. graduation and dropout rates for appropriate multiple-year cohorts;
   g. *(for high schools only)* student postsecondary readiness, including the percentage of graduates submitting applications to postsecondary institutions, high school completion, postsecondary admission and postsecondary enrollment or employment;
   h. financial performance and sustainability; and
   i. governing board performance and stewardship, including compliance with all applicable laws, regulations, and terms of the charter contract.

2. Explain how the school will measure and evaluate academic progress – of individual students, student cohorts, and the school as a whole – throughout the school year, at the end of each academic year, and for the term of the charter contract. Explain how the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. Identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data. For virtual schools, in particular, explain how the school will provide student assessments in a manner that ensures that an individual student is being assessed and that the assessment is valid.

3. Explain the school's Effective Behavioral and Instructional Support System (EBISS), including composition of EBISS team, frequency of meetings, monitoring of core instruction, identification of appropriate interventions and description of ways in which interventions will be provided.

4. Explain the training and support that school leadership and teachers will receive in analyzing, interpreting, and using performance data to improve student learning.

5. Explain how the school will ensure compliance with state assessment requirements. In particular, for virtual schools, explain how the school will administer required state assessments to all students in a proctored setting.

6. Explain how the school will measure and report results in ways that allow for comparisons with other district schools.

School Calendar and Schedule (ORS § 338.045.2.p,r)

1. Discuss the annual academic schedule for the school, including total number of days/hours of instruction. Explain how the calendar reflects the needs of the educational program. Provide, as **Attachment 5,** the school's proposed calendar for the first year of operation, including the date upon which the school would begin operating.

2. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade. Provide, also in **Attachment 5**, a sample daily and weekly schedule for each division of the school.

School Culture (ORS § 338.045.3.a)

1. Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.

2. Explain the plan to create and implement this culture for students, teachers, administrators, and parents, starting from the first day of school. Describe the plan for enculturating students who enter the school mid-year.

3. Describe a typical school day from the perspective of a student in a grade that will be served in the first year of operation. If, particularly for a virtual or distance school, a "typical" day will vary widely, also explain the bounds of that variation and how you will ensure that students are meeting education requirements and on track with learning.

4. Describe a typical day for a teacher of a grade that will be served in the first year of operation. If, particularly for a virtual or distance school, a "typical" day will vary widely, also explain the bounds of that variation.

Supplemental Programming (ORS § 338.045.3.a)

1. If summer school will be offered, describe the program(s). Explain the schedule and length of the program, including the number of hours and weeks. Discuss the anticipated participants, including number of students and the methods used to identify them. Describe the anticipated resource and staffing needs for these programs and how will they be funded.

2. Describe the extra- or co-curricular activities or programming the school will offer, how often they will occur, and how they will be funded.

3. Describe the programs or strategies the school will employ to address student mental, emotional, and social development and health.

4. If applicable, describe any other student-focused activities and programs that are integral to the educational and student-development plans.

5. If applicable, describe distance-learning options the school will provide.

Special Populations and At-Risk Students (ORS § 338.045.2.s)

1. Describe the overall plan to serve students with special needs, including but not limited to students with Individualized Education Programs or Section 504 plans, English Language Learners (ELLs), students identified as intellectually gifted, and students at risk of academic failure or dropping out. Identify the special populations that the school expects to serve and the basis for these assumptions, whether through data related to a specifically targeted school or neighborhood, or more generalized analysis of the population to be served. Discuss how the course scope and sequence, daily schedule, staffing plans, support strategies, and resources will meet or be adjusted for the diverse needs of students.

2. Complete this table to demonstrate calculation of at-risk students the school anticipates serving.

	% FRL	% Students with Disabilities	% ELLs	Total % At-Risk
Anticipated school demographics				
Current school district demographics				

3. Specifically describe the plan to identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible. Specify the programs, strategies, and supports you will provide, including the following:
   a. Methods for identifying students with special education needs (and avoiding misidentification);
   b. Specific instructional programs, practices, and strategies the school will employ to provide a continuum of services, ensure access to the general education curriculum, and ensure academic success for students with special education needs;
   c. Plans for monitoring and evaluating the progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student's goals as set forth in the IEP;
   d. Plans for working with the district in the service of students with disabilities;
   e. Plans for promoting graduation for students with special education needs *(high schools only)*; and
   f. Plans to have qualified staffing adequate for the anticipated special needs population.

4. Explain how the school will meet the needs of students who qualify for support under Section 504 of the Rehabilitation Act of 1973, including the following:
   a. Methods for identifying students (and avoiding misidentification);
   b. Specific instructional programs, practices, and strategies the school will employ to provide a continuum of services, ensure access to the curriculum, and ensure academic success for students with 504 Plan needs;
   c. Plans for monitoring and evaluating the progress and success of students on 504 Plans to ensure the attainment of each student's goals; and
   d. Plans to have qualified staffing adequate for the anticipated needs of students with 504 Plans.

5. Explain how the school will meet the needs of ELL students, including the following:
   a. Methods for identifying ELL students (and avoiding misidentification);
   b. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students;
   c. Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services;
   d. Means for providing qualified staffing for ELL students.

6. Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports that will be provided for these students.

7. Explain how the school will identify and meet the needs of intellectually gifted students, including the following:
   a. Specific research-based instructional programs, practices, strategies, and opportunities the school will

employ or provide to enhance their experience;
  b. Plans for monitoring and evaluating the progress and success of these students; and
  c. Means for providing qualified staffing for intellectually gifted students.

Student Recruitment and Enrollment (ORS § 338.045.2.k)

1. Explain the plan for student recruitment and marketing that will provide equal access to interested students and families. Specifically, describe the plans for outreach to families in poverty, academically low-achieving students, students with disabilities, and other youth at risk of academic failure.

2. Describe the timeline and individuals responsible for student recruitment/engagement and enrollment.

3. Provide, as **Attachment 6**, the school's Admissions and Enrollment Policy, which should include the following:
   a. Tentative dates for application period, and enrollment deadlines and procedures, including explanation of how the school will receive and process applications;
   b. Description of any enrollment preferences or priorities, including information about whether or not the school intends to request a waiver of any part of ORS 338.0125 as allowed by ORS 338.025;
   c. Description of the school's lottery procedures and how they will comply with statutory requirements (ORS 338.125);
   d. Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers; and
   e. Explanation of the purpose of any pre-admission activities for students or parents.

Student Discipline (ORS § 338.045.2.o)

1. Describe in detail the standards for behavior and the procedures for the discipline, suspension, or expulsion of students. Taken together, the narrative description and discipline policy should:
   a. Explain the practices the school will use to promote expected student behavior, including both penalties for infractions and incentives for positive behavior;
   b. List and define the offenses for which students must (where non-discretionary) and may (where discretionary) be suspended or expelled;
   c. Explain how the school will take into account the rights of students with disabilities, including students with Behavior Support Plans, in disciplinary actions and proceedings; and
   d. Explain procedures for due process when a student is suspended or expelled as a result of a violation, including a description of the appeal process that the school will employ for students facing expulsion and a plan for providing services to students who are expelled or out of school for more than ten days.

2. If already developed, provide the proposed discipline policy as **Attachment 7.**

3. Discuss how students and parents will be informed of the school's discipline policy.

Parent and Community Involvement (ORS § 338.045.2.t)

1. Describe the role to date of any parents and community members involved in developing the proposed school.

2. Discuss specifically what has been done to assess and build parent and community demand for the school. Explain the plan to continue to engage parents and community members from the present time, to approval, and through opening.

3. Explain the plan to engage parents in the life of the school (in addition to any proposed governance roles described below). Describe the plan for building family-school partnerships to strengthen support for learning and encourage parental, student, and community involvement. Describe any opportunities and/or expectations for ongoing parent, student, and community involvement. Describe specific strategies that will be used to engage families who are not available to support school activities during normal operational hours.

4. Discuss the community resources that will be available to students and parents. Describe any partnerships the

school will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student learning.

5. Provide, as **Attachment 8,** existing evidence of demand for the school (e.g. petitions or intent to apply forms) and/or support from intended community partners (e.g. letters of intent/commitment, memoranda of understanding, and/or contracts).

Educational Program Capacity (ORS § 338.045.2.q)

1. Identify the key members of the school's leadership team. Identify only individuals who will play a substantial and ongoing role in school development, governance, and/or management, and will thus share responsibility for the school's educational success. These may include current or proposed governing board members, school leadership/management, and any essential partners who will play an important ongoing role in the school's development and operation.

2. Describe the team's individual and collective qualifications for implementing the school design successfully, including capacity in areas such as: school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent and community engagement.

3. Describe the group's ties to and/or knowledge of the target community.

4. Identify any organizations, agencies, or consultants that are partners in planning and establishing the school, along with a brief description of their current and planned role, and any resources they have contributed or plan to contribute to the school's development.

5. Identify the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record. Provide specific evidence that demonstrates capacity to design, launch, and manage a high-performing charter school. Discuss the evidence of the leader's ability to effectively serve the anticipated population. This evidence may include annual student achievement data, disaggregated by subgroup, for every school under the current or prior management of the leader or other administrator. Also provide, as **Attachment 9**, the qualifications, resume, and professional biography.

-OR-

If no candidate has been identified, discuss the process and timeline for recruiting, selecting, and hiring the school leader. Describe the criteria to be used in selecting this leader, and instead provide as **Attachment 9** a complete job description and required qualifications.

6. Describe the responsibilities of the school's leadership/management team beyond the principal/head of school.
   a. If known, identify the individuals who will fill these positions, explain why each is well qualified for a specific role, and summarize their relevant track record of success. Provide, as **Attachment 10**, the qualifications, resumes, and professional biographies.

-AND/OR-

   b. If any of these positions is not yet filled, discuss the process and timeline for recruiting, selecting, and hiring these team members. Describe the criteria to be used in selecting each, and instead provide in **Attachment 10** a complete job description and required qualifications for each unfilled role.

7. Explain who is currently leading the school development process, and who will work on a full-time or nearly full- time basis following approval of the charter to lead development of the school. Describe the plan to compensate these individuals.

Section 2: Operations Plan & Capacity

Organization Charts (ORS § 338.045.2.f)

1. Submit, as **Attachment 11**, organization charts that show the school governance, management, and staffing structure in
   a. The first year of school operations;
   b. At the end of the charter term; and
   c. When the school reaches full capacity, if in a year beyond the first charter term.

   Each organization chart should clearly delineate the roles and responsibilities of, and lines of authority and reporting among, the governing board, staff, any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the school. The organization charts should also specifically document lines of authority and reporting within the school.

Legal Status and Governing Documents (ORS § 338.045.2.f)

1. Describe the proposed school's legal status, including non-profit status and federal tax-exempt status.

2. Provide, as **Attachment 12:**
   a. The bylaws of the board, including any amendments;
   b. The code of ethics and conflict of interest policies for the board;
   c. Any additional governing documents already adopted, including other board policies; and
   d. The completed and signed statement of assurances template.

Governing Board (ORS § 338.045.2.f)

1. Explain the governance philosophy that will guide the board, including the nature and extent of involvement by key stakeholder groups.

2. Describe the governance structure of the proposed school, including the primary roles, powers, and duties of the governing board and how it will interact with the principal/head of school and any advisory bodies.

3. Describe the current and desired size and composition of the governing board. Identify key skills, areas of expertise, and constituencies that are and/or will be represented on the governing board.

4. Explain how this structure and composition will ensure that:
   a. The school will be an educational and operational success;
   b. The board will evaluate the success of the school and school leader; and
   c. There will be active and effective representation of key stakeholders, including parents.

5. List all current and prospective board members and their intended roles. For each individual identified, summarize interest in and qualifications to serve on the board. Explain the procedure by which board members have been and will be selected. How often will the board meet? Discuss the plans for any committee structure. Provide, as **Attachment 13,** the following documents for each individual identified here: a completed and signed Board Member Information Sheet and Board Member Acknowledgment Form, resume, and professional biography. (If a board member's documentation is attached elsewhere in this proposal, state so on the Information Sheet).

6. Describe plans for increasing the capacity of the governing board. How will the board expand and develop over time? How and on what timeline will new members be recruited and added, and how will vacancies be filled? What are the priorities for recruitment of additional board members? What kinds of orientation or training will new

board members receive, and what kinds of ongoing development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and any requirement to participate. *NOTE: If a single board will govern multiple schools, or there will be a network-level or ESP-level board, you may reference responses to Addendum 3, providing a sub section and page note.*

7. If this proposal is being submitted by a pre-existing non-profit organization, respond to the following:
    a. Was the pre-existing non-profit formed for a purpose other than operating schools? If so, please provide the mission of the organization and explain how operating charter schools serves that mission.
    b. Will the pre-existing non-profit board govern the new school, or will the charter be held by a new non-profit corporation governed by a separate board?
    c. If the non-profit's current board will govern the charter school, what steps have been taken to transform its board membership, mission, and bylaws to assume its new duties? Describe the plan and timeline for completing the transition and orienting the board to its new duties.
    d. If a new board has been or will be formed, describe what, if anything, its ongoing relationship to the existing non-profit's board will be.

8. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual or perceived conflicts if the proposal is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

Advisory Bodies (ORS § 338.045.3.a)
1. Describe any advisory bodies or councils that are in place or will be formed, including the roles and duties of each. For each identified group describe
    a. Its current and/or planned composition and the strategy for achieving that composition;
    b. The role of parents, students, and teachers, as applicable; and
    c. The reporting structure relative to the school's governing board and leadership.

Grievance Process (ORS § 338.045.3.a)
1. Explain the process that the school will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure, or practice at the school.

Staff Structure (ORS § 338.045.2.q)
1. Summarize the staffing structure and growth plan for the school, describing:
    a. Year one positions, as well as positions to be added in future years;
    b. Administrative, instructional, and operational and support staff; and
    c. The teacher-student ratio, as well as the ratio of total adults to students for the school.

2. Provide, as **Attachment 14**, a complete staffing chart for the school (prepared using the template provided).

3. Explain how the relationship between the school's senior administrative team and the rest of the staff will be managed.

Staffing Plans, Hiring, Management, and Evaluation (ORS § 338.045.2.q)
1. Explain the relationship that will exist between the school and its employees, including whether the employees will be at-will and whether the school will use employment contracts. If the school will use contracts, explain the nature and purpose of the contracts. If developed, provide, as **Attachment 15**, any personnel policies or employee manual.

2. Outline compensation structure for all employees, including salary ranges and employment benefits, as well as any incentives or reward structures, if applicable.

3. Describe the strategy, plans, and timeline for recruiting and hiring teaching staff, including the school's plan for hiring highly qualified staff in accordance with the ESEA. Explain required qualifications for instructional staff, key selection criteria, and any special considerations relevant to your school design. Include an analysis of your initial year full time equivalency (FTE) for teaching and administrative staff to demonstrate how your school will comply with ORS 338.135(7).

4. Outline the school's procedures for hiring and dismissing school personnel, including conducting criminal background checks for all employees.

5. Explain how teachers and administrators will be supported, developed, and evaluated. Discuss how the school will adhere to Oregon's core teaching standards and the Oregon Framework for Teacher and Administrator Evaluation and Support Systems with modifications for your school model, as appropriate, in compliance with HB2186. If already developed, provide, in **Attachment 16,** any supplemental teacher or administrator evaluation tool(s). *If you intend to use only the District's evaluation system, do NOT include the mandated assessment tools. Likewise, do not include copied and pasted materials from online resources, such as copies of the Danielson framework.*

6. Explain how the school intends to handle unsatisfactory leadership or teacher performance, as well as leadership/teacher changes and turnover.

Professional Development (ORS § 338.045.3.a)
1. Identify the person(s) or position(s) responsible for overseeing professional development (PD).

2. Discuss the core components of the school's PD plan and how they will support effective implementation of the educational program. Discuss the extent to which professional development will be individualized or uniform. Who will be responsive for administering PD programs (e.g. a staff member, consultant, etc.)?

3. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.

4. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan. Include time scheduled for common planning or collaboration and discuss how such time will typically be used.

Facilities (ORS § 338.045.2.j)
1. Describe the basic facilities requirements for accommodating your school plan, including number of classrooms, square footage per classroom, common areas, overall square footage, amenities, and how the facility will support equitable access to students in the area.

2. Identify any other significant facilities needs not already specified, including playground, large common space for assemblies and other large group meetings, athletic facilities, and other special considerations (identify and explain).

3. For virtual schools, provide a plan for maintaining student records and school records, including financial records, at a designated central office of operations that is located in compliance with ORS § 338.120.g

4. Describe the process for identifying and securing a facility, including any brokers or consultants you are employing to navigate the real estate market, plans for renovations, timelines, financing, etc. Include in this discussion the plan for ensuring that identified facilities will comply with applicable state and local health and safety requirements and applicable planning review procedures.

5. If you currently hold a facility or have an MOU or other proof of intent to secure a specific facility, please provide proof of the commitment as **Attachment 17**. Briefly describe the facility including location, size, and amenities. You may provide, also in **Attachment 17**, up to 10 pages of supporting documents providing details about the facility.

Start-Up & Ongoing Operations (ORS § 338.045.2.v)

1. Provide, as **Attachment 18**, a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals.

2. Describe the transportation plan that details how reliable and safe transportation will be provided for all students. In addition to daily transportation needs, describe how the school plans to meet transportation needs for field trips and athletic events, if applicable.

3. Provide the school plan for safety and security for students, the facility, and property. Explain the types of security personnel, technology, equipment, and policies the school will employ.

4. Explain the plan for performance bonding or insuring the school, including buildings and liabilities. List the types of insurance coverage the school will secure, including a description of the levels of coverage and estimated costs. Explain the basis for these assumptions.

Contingency Plans for Potential Closure (ORS § 338.045.2.w)

1. Describe the proposed plan for the placement of public charter school teachers, other school employees, and students of the public charter school upon termination or nonrenewal of the charter.

Operations Capacity

1. Describe the applicant team's individual and collective qualifications for implementing the Operations Plan successfully, including capacity in areas such as the following: staffing; professional development; general operations; non-profit governance; and facilities management.

2. Describe the organization's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

Section 3: Financial Plan & Capacity

Financial Plan (ORS § 338.045.2.m,n,v,x)

1. Describe the systems, policies and processes the school will use for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements. Specifically, explain how the financial management system will meet the requirements of ORS § 338.095.1 and a plan for having the financial management system in place at the time the school begins operating.

2. Describe the roles and responsibilities of the school's administration and governing board for school finances and distinguish between each.

3. Describe the school's plans and procedures for conducting a program review and annual audit of the financial and administrative operations of the school.

4. Describe how the school will ensure financial transparency to Bend-La Pine Schools and the public, including its plans for public adoption of its budget and public dissemination of its annual audit and an annual financial report.

5. Describe any services to be contracted, such as transportation, business services, payroll, and auditing services, including the anticipated costs and criteria for selecting such services.

6. Describe the school's plans for liability insurance to indemnify the school, its board, staff, and teachers against tort claims.

7. Submit the completed Financial Plan Workbook as **Attachment 19**. In developing your budget, use the information provided to calculate your per-pupil revenue projection. Prepare your submission using the template provided. Complete ALL sheets in the workbook. *NOTE: Applicants for multiple schools should complete all sheets in the workbook for all schools opening in year one.*

8. Submit a budget narrative as **Attachment 20** that presents a detailed description of assumptions, calculations, and revenue estimates. The narrative should include, at minimum, the basis for revenue projections, staffing levels, and costs. Provide specific evidence supporting assumptions and/or describe the source of estimated amounts wherever possible.
   a. Describe all anticipated funding sources. Clearly address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising). Indicate the amount and sources of funds, property, or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated, and include in **Attachment 20** evidence of commitment for any funds on which the school's core operation depends.
   b. Discuss the school's contingency approach and plan to meet financial needs if anticipated revenues are not received or are lower than estimated.
   c. Explain in detail the year one cash flow contingency plan, in the event that revenue projections are not met (or not met on time).

Financial Management Capacity (ORS § 338.045.3.a)

1. Describe the 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.

List of Addenda

The following addenda should be completed as applicable by new and existing operators. Note that some addenda require additional attachments.

1. For CONVERSION SCHOOL proposals
2. For proposals from applicants (new or existing) using EDUCATION SERVICE PROVIDERS
   - Attachment ESP-1: ESP audited financial statements and annual report
   - Attachment ESP-2: ESP contract
3. For EXISTING OPERATOR proposals
   - Attachment EO-1: Business plan and last two years of organization's annual reports
   - Attachment EO-2: Years 1, 3, and 5 network organizational charts
   - Attachment EO-3: Network-level budget
   - Attachment EO-4: Network-level budget narrative
   - Attachment EO-5: Existing schools information template
   - Attachment EO-6: Internal financial statements for the organization and related business entities
   - Attachment EO-7: Last three years of audit reports and management letters for the organization and related business entities
   - Attachment EO-8: Information on past or current litigation

Addendum 1. Conversion Schools

Community Need and Support (ORS § 338.045.3.a)

1. Explain the rationale for converting the existing public school to charter status.

2. Describe the efforts to date to garner parent, staff/teacher, student, and community support and involve individuals and organizations in the conversion.

3. Provide specific plans for ongoing family, staff, and community engagement, including timing and responsible individuals.

Enrollment and Recruitment Supplement (ORS § 338.045.3.a)

1. Explain the plan to cultivate student and parent investment in the conversion, especially how the school plans to limit attrition from the existing student body. Describe how this plan will successfully transition students who currently attend or are zoned to attend the school being converted.

2. *If applicable,* summarize the school's policy regarding enrollment preferences for students who reside within the former attendance area of the proposed charter school. (A public charter school that would like to give enrollment preferences for students based on a geographic boundary must secure a waiver of the law granted by the State Board of Education as per ORS 338.025.)

Student and Staff Transition (ORS § 338.045.2.y)

1. Describe the alternative arrangements for students who choose not to attend the public charter school and for teachers and other school employees who choose not to participate in the public charter school.

2. Describe the relationship that will exist between the public charter school and its employees, including evidence that the terms and conditions of employment have been addressed with affected employees and their recognized representative, if any.

Addendum 2. Education Service Providers

ESP Selection

1. Explain why the applicant is seeking to contract with an ESP rather than operate the school(s) directly.

2. Explain how and why the ESP was selected, including when and how the applicant learned of the ESP, which other ESPs were considered, why the ESP was selected over other ESPs, and what due diligence was conducted.

ESP Prior History

1. Explain the ESP's success in serving student populations similar to the target population of the school. Describe the ESP's demonstrated academic track record as well as successful management of non-academic school functions (e.g., back-office services, school operations, extracurricular programs). Provide summary information from reference checks conducted by the applicant (regarding the third-party ESP), identifying each reference.

2. List all schools currently or formerly operated by the ESP. Identify those schools that serve the same grade levels *and* student populations demographically similar to the anticipated population of the proposed school. Include name, year opened, contact information, location, number of students, and contact information for the authorizer for each currently operating school.

3. Provide evidence of the financial health of the ESP. Attach as **Attachment ESP-1** the most recent independent financial audit report of the ESP and its most recent annual report.

4. List and explain any management contract terminations as well as any charter revocations, non-renewals, or withdrawals/non-openings that the proposed ESP has experienced in the past five (5) years.

Legal Relationship with ESP

1. Provide evidence that the board is independent from the ESP and self-governing, including evidence of independent legal representation and arm's-length negotiating.

2. Describe any existing or potential conflicts of interest between the school's governing board, proposed school employees, proposed ESP, and any affiliated business entities.

3. List all subsidiaries or related entities that are affiliated or owned in whole or in part by the ESP, and identify the nature of those entities' business activities.

4. Explain whether the school has or will have any relationship with or receive any services from any of the entities listed in the previous question.

5. Explain the supervisory responsibilities of the ESP (if any), including which school employees the ESP will supervise, how the ESP will supervise these employees, and how the charter school board will oversee the ESP's supervisory responsibilities.

6. If the school's governing board intends to execute promissory notes or other negotiable instruments, or enter into a lease, lease-purchase agreement, or any other facility or financing relationships with the ESP, provide evidence that such agreements are separately documented and not part of or incorporated in the school management contract. Any facility or financing agreements must be consistent with the school governing board's authority and practical ability to terminate the management agreement and continue operation of the school.

7. Describe and provide documentation of any loans, grants, or investments made between the ESP and the school, including an explanation of how any such loans, grants, or investments may be initiated, repaid, and refused by the school.

ESP Management Plan

1. Provide a detailed description of the roles and responsibilities of the ESP.

2. Describe the scope of services and costs of all resources to be provided by the ESP.

3. Describe the oversight and evaluation methods that the Board will use to oversee the ESP. What are the school-wide and student achievement results that the management organization is responsible for achieving? How often, and in what ways, will the board review and evaluate the ESP's progress toward achieving agreed-upon goals? Will there be an external evaluator to assess the ESP's performance? What are the conditions, standards, and procedures for board intervention, if the management organization's performance is deemed unsatisfactory?

4. Describe the compensation structure and payment schedule, including clear identification of all fees, bonuses, and any other compensation to be paid to the ESP.

5. Describe the respective financial responsibilities of the school governing board and the ESP. Who will own property purchased with public funds? Which operating and capital expenditures will each party be responsible for? What types of spending decisions can the management organization make without obtaining board approval? What reports must the ESP submit to the board on financial performance, and on what schedule? How will the school governing board provide financial oversight?

6. What is the term (duration) of the management agreement? Explain the conditions and procedures (including time frames, notice, and decision-making procedures) for renewal and termination of the contract. How often will the management agreement be renewed? Describe the conditions that both the ESP and the school must satisfy for the management agreement to be renewed. On what grounds may the ESP or the school terminate the management agreement for cause, and without cause? List any indemnification provisions in the event of default or breach by either party.

7. Describe the plan for the operation of the school in the event of termination of the management agreement.

8. Provide as **Attachment ESP-2** a draft of the proposed management agreement with the ESP.

Addendum 3. Existing Operators

10 Pages - This addendum is required of any applicant seeking any of the following:
- **approval for multiple schools**
- **replication of existing schools or school models**
- **governance of multiple schools by a single board of directors**

Complete each section as applicable. All applicable sections of this addendum MUST be completed in order for the proposal as a whole to be deemed complete. If an applicant believes that a particular question in this section is not applicable to their proposal, the applicant should so state AND explain why the applicant believes the particular question does not apply. If a question has been thoroughly answered earlier in the narrative proposal, the applicant should so state AND reference the section, question number, and page number. If an applicant is unsure as to whether or not a particular section is required, it is the responsibility of the applicant to contact Bend-La Pine Schools for guidance.

*Note: The term "organization" as used throughout this addendum applies to any applicant or partnership among groups applying to replicate a school model. Thus, it may include an existing school or group of schools proposing to replicate; an existing school network or charter management organization (CMO) applying directly for a charter; a governing board proposing to contract with a CMO or other education service provider (ESP); or other entities and arrangements. *In the case of an applicant proposing to contract or partner with a service provider, applicants should provide requested information for both entities if applicable. Applicants proposing to contract with an ESP should also complete Addendum 3.*

Replication/Network Overview

1. **Organization Mission and Vision.** Provide the mission of the school network, charter management organization (CMO), or education service provider (ESP), and explain how creation of the proposed school or schools fits within this mission.

2. **Organization Strategic Vision and Growth Plans.** Provide an overview of the organization's strategic vision, five-year growth plan, and rationale for developing new schools or replicating an existing school or model. Briefly describe the communities where the organization is seeking approval to expand and explain how each proposed school would meet identified needs in its respective community.

3. **Anticipated Population and Educational Need.** Describe the student populations and educational needs served by any existing schools operated by the applicant or proposed ESP, and the anticipated populations and needs for each proposed new school.

4. **Educational Plan and School Design.** Provide an overview of the education program proposed for replication, including key non-negotiables of the education model. Briefly explain how and why the program was selected for replication, and the research base and performance record that demonstrates the school model will be successful in improving academic achievement for the targeted student population.

Curriculum and Instructional Design Supplement

1. Explain any differences in the basic learning environment among the schools being proposed.

2. Explain the organization's approach to replicating and implementing the school model, including curriculum and instructional design among multiple schools.

3. Describe any key educational features that will *differ* from the operator's or management provider's existing schools or schools proposed for replication, not already discussed above. Explain the rationale for the variation in approach and any new resources the variation would require.

Network Vision, Growth Plan, and Capacity

1. Describe the organization or network strategic vision, desired impact, and five-year growth plan for developing new schools within the local community, state, and region, including other states if applicable. Include the following information, regardless of school location: proposed years of opening; number and types of schools (divisions, grade levels served); any pending applications; all currently targeted markets/communities and criteria for selecting them; and projected enrollments.

2. If the existing portfolio or growth plan includes schools in other states, explain specifically how growth within Oregon fits into the overall growth plan.

3. Provide evidence of organizational capacity to open and operate high-quality schools in Oregon and elsewhere in accordance with the overall growth plan. Outline specific timelines for building or deploying organizational capacity to support the proposed schools.

4. Discuss the results of past replication efforts and lessons learned – including particular challenges or troubles encountered; how you have addressed them; and how you will avoid or minimize such challenges for the proposed schools.

5. List any schools that were previously approved by this or another authorizer but which failed to open or did not open on time, and explain the reasons for the failure or delay.

6. Discuss the greatest anticipated risks and challenges to achieving the organization's desired outcomes in Oregon over the next five years and how the organization will meet these challenges and mitigate risks.

7. Provide, as **Attachment EO-1**, the organization's annual reports for the last two years and any current business plan for the organization or network.

Network Management

1. Identify the organization's leadership team and their specific roles and responsibilities.

2. Explain any shared or centralized support services the network organization will provide to schools in Oregon. Describe the structure, specific services to be provided, the cost of those services, how costs will be allocated among schools, and specific service goals. How will the organization measure successful delivery of these services?   (In the case of a governing board proposing to contract with a management organization, service goals should be outlined in the draft contract to be provided in **Attachment ESP-2**.)

3. Using the table below, summarize school- and organization-level decision-making responsibilities as they relate to key functions, including curriculum, professional development, culture, staffing, etc.

Function	Network/Management Organization Decision-Making	School Decision-Making
Performance Goals		
Curriculum		
Professional Development		
Data Management and Interim Assessments		

Promotion Criteria		
Culture		
Budgeting, Finance, and Accounting		
Student Recruitment		
School Staff Recruitment and Hiring		
H/R Services (payroll, benefits, etc.)		
Development/ Fundraising		
Community Relations		
I/T		
Facilities Management		
Vendor Management/ Procurement		
Other operational services, if applicable		

Network Governance and Legal Status

1. Explain what entity will hold the charter for each of the proposed schools.

2. Describe the governance structure at both the network and individual school levels and the plan for satisfying all applicable statutory and district requirements for composition of charter school governing boards. Explain whether each school/campus will have an independent governing board, whether there will be a single network-level board governing multiple schools, or both a network-level board and boards at individual schools. If there will be both a network-level board and boards at each school, describe the organizational relationship between the boards, the legal status of each board, and the scope of authority of each. If each school will have an independent governing board but no network-level board, explain how the network will be governed and how decisions that affect the network as a whole will be made.

3. Provide, as **Attachment EO-2**, the following organization charts:
   - Year 1 network as a whole (including both network management and schools within the network)
   - Year 3 network as a whole
   - Year 5 network as a whole

The organization charts should clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the network/management organization, schools, governing board(s), staff, any related bodies (such as advisory bodies), and any external organizations that will play a role in managing the schools.

4. If an existing board will govern the proposed school(s), discuss the plan to transform that board's membership, mission, and bylaws to support the charter school expansion/replication plan, as necessary. Describe the plan and timeline for completing the transition and orienting the board to its new duties. If a new board will be formed, describe how and when the new board will be created and what, if anything, its ongoing relationship to the existing non-profit's board will be.

5. Describe plans for increasing the capacity of the governing board (if not fully addressed in the primary application). How will the board expand and develop over time? How and on what timeline will new members be recruited and added, and how will vacancies be filled? What are the priorities for recruitment of additional board members? What kinds of orientation or training will new board members receive, and what kinds of ongoing development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation. If there will be a network-level board, identify any board development requirements relative to the organization's proposed growth and governance needs.

6. Explain how the interests of individual schools will be balanced with network interests and how key stakeholders will be represented.

7. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; and b) the board will evaluate the success of the school and school leader.

Network Leadership Pipeline

Describe the organization's current or planned process for sourcing and training potential school leaders for schools opening in subsequent years. Explain how you have developed or plan to establish a pipeline of potential leaders for the network as a whole. If known, identify candidates already in the pipeline for future positions.

Network-wide Staffing

Complete the following table indicating projected staffing needs for the entire network over the next five years. Include full-time staff and contract support that serve the network 50% or more. Change or add functions and titles as needed to reflect organizational plans.

Year	1	2	3	4	5
Number of elementary schools					
Number of high schools					
Total schools					
Student enrollment					
Management Organization Positions					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
[specify]					
Total back-office FTEs					

Elementary School Staff					
Principals					
Assistant Principals					
Add'l School Leadership Position 1 [specify]					
Add'l School Leadership Position 2 [specify]					
Add'l School Leadership Position 3 [specify]					
Classroom Teachers (Core Subjects)					
Classroom Teachers (Specials)					
Student Support Position 1 [e.g., Social Worker]					
Student Support Position 2 [specify]					
Specialized School Staff 1 [specify]					
Specialized School Staff 2 [specify]					
Teacher Aides and Assistants					
School Operations Support Staff					
Total FTEs at elementary schools					
High School Staff					
Principals					
Assistant Principals					
Deans					
Add'l School Leadership Position 1 [specify]					
Add'l School Leadership Position 2 [specify]					
Add'l School Leadership Position 3 [specify]					
Classroom Teachers (Core Subjects)					
Classroom Teachers (Specials)					
Student Support Position 1 [e.g., Social Worker]					
Student Support Position 2 [specify]					
Specialized School Staff 1 [specify]					
Specialized School Staff 2 [specify]					
Teacher Aides and Assistants					
School Operations Support Staff					
Total FTEs at high schools					
Total network FTEs					

Network Performance Management

1. Describe the organization's approach to academic underperformance for schools that fall short of student academic achievement expectations or goals at the school-wide, classroom, or individual student level.

2. Describe the organization's plans to monitor performance of the portfolio as a whole. What actions will you take if the network as a whole fails to meet goals? Discuss how the organization assesses its readiness to grow and under what circumstances the organization will delay or modify its growth plan.

Network Financial Plan

1. Describe the roles and responsibilities of the school versus the network with respect to school finances and distinguish between each.

2. Discuss any material audit findings for your organization or any school that you operate.

3. Describe how the organization will provide and publish an independent annual audit of the organization-level financial and administrative operations.

4. Submit as **Attachment EO-3** a detailed budget for the network level *(no template is provided)*.
   Include the following, as individual sheets:
   a. Startup Budget: The start-up budget should list all anticipated revenue and expenditures for the network in the period leading up to the first fiscal year in which the school(s) listed in this proposal would open. In other words, this budget demonstrates how the organization will support pre-opening activities until the first school(s) proposed in this proposal open.
   b. Year one budget
   c. Startup/year one monthly cash flow projection
   d. Five year budget projections
   e. Discuss the school's contingency approach and plan to meet financial needs if anticipated revenues are not recived or are lower than estimated.
   f. Explain in detail the year one cash flow contingency plan, in the event that revenue projections are not met (or not met on time).

5. Submit as **Attachment EO-4** a clearly labeled budget narrative for network-level budgets, including detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which budgets will rely on variable income (e.g., grants, donations, fundraising) and how the organization will meet fundraising goals.
   Include the following:
   a. Anticipated Funding Sources. Indicate the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated, and include evidence of commitment for any funds on which the network's core operation depends.
   b. Discuss contingency plans to meet financial needs if anticipated revenues are not received or are lower than estimated.
   c. Year one cash flow contingency, in the event that revenue projections are not met in advance of the proposed school(s) opening.

Prior History Evaluation Information

NOTE: The district will use the information provided in this section to assess the academic, organizational, and financial performance record of the organization, and the organization's schools or the school model that the organization proposes to replicate. The applicant must provide all of the requested information for all of its schools or the schools it proposes to replicate. The district may then select a subset of schools for which the applicant will be required to provide additional performance information, including academic proficiency and growth data, recent renewal evaluations and site visit reports, and multiple years of independent financial audit reports. The district may also conduct independent due diligence on the applicant and any related entities.

As explained above, the term "organization" as used throughout this addendum applies to any applicant or partnership among groups applying to replicate a school model. Thus, it may include an existing school or group of schools proposing to replicate; an existing school network or charter management organization (CMO) applying directly for a charter; a governing board proposing to contract with a CMO or other education service provider (ESP); or other entities and arrangements.

1. Using the *Existing Schools Information Template* as **Attachment EO-5**, provide all requested information for each of the organization's schools.

2. Select one or more of the consistently high-performing schools that the organization operates, and discuss the school's performance. Be specific about the results on which you base your judgment that the school is high-performing. Include student achievement status, growth, absolute, and comparative academic results, as available.

    a. Discuss the primary causes to which you attribute the school's distinctive performance.

    b. Discuss any notable challenges that the school has overcome in achieving its results.

    c. Identify any ways in which the school's success has informed or affected how other schools in the network operate. Explain how the effective practices, structures, or strategies were identified and how they were implemented elsewhere in the network.

3. Select one or more of the organization's schools whose performance is relatively low or not satisfactory and discuss the school's performance. Be specific about the results on which you base your judgment that performance is unsatisfactory. Include student status, growth, absolute, and comparative academic results, as available.

    a. Describe the primary causes to which you attribute the school's problems.

    b. Explain the specific strategies that you are employing to improve performance.

    c. How will you know when performance is satisfactory?

    d. What are your expectations for satisfactory performance in terms of performance levels and timing?

4. Provide as **Attachment EO-6,** the most recent internal financial statements, including balance sheets and income statements, for the organization and any related business entities. Be sure that the school level, ESP/CMO level, and the overall operations are distinctly represented.

5. For the organization as a whole and any related business entities, provide the following as **Attachment EO-7**: (a) the last three years of independent financial audit reports and management letters; and (b) the most recent internal financial statements, including balance sheets and income statements. Be sure that the ESP/CMO level and the overall operations are distinctly represented.

6. List any contracts with charter schools that have been terminated or non-renewed by either the organization or the school, including the reason(s) for such termination and whether the termination was for "material breach."

7. List any and all charter revocations, non-renewals, shortened or conditional renewals, or withdrawals/non-openings of schools operated by the organization, and explain what caused these actions.

8. Explain any performance deficiencies or compliance violations that have led to formal authorizer intervention with any school operated by the organization in the last three years, and explain how such deficiencies or violations were resolved.

9. Identify any current or past litigation, including arbitration proceedings, by school, that has involved the organization or any charter schools it operates. If applicable, provide in **Attachment EO-8** (1) the demand, (2) any response to the demand, and (3) the results of the arbitration or litigation.

List of Exhibits

1. Sample Curriculum Description Table
2. Sample Scope and Sequence Summary
3. Sample Curriculum Map

Exhibit A: Sample Curriculum Description Table

Content Area	Publisher/Product	Rationale for Selection
Grade Level:		
ELA		
Math	Connected Mathematics	*Connected Mathematics* is a constructivist, problem-centered middle school math curriculum that asks students to spend significant portions of time solving problems in contexts that require thinking, planning, reasoning, computing, and evaluating. Problem-centered math helps students make sense of and retrieve math concepts more readily. *Connected Math* focuses on depth of understanding, as well as on developing the necessary habits of mind that are conducive to the long-term study of mathematics. An independent study conducted by Claremont Graduate University's Institute of Organizational and Program Evaluation Research, reported that Connected Mathematics students demonstrated significantly greater gains in problem-solving, math communication, and math reasoning strategies than their peers using other math programs as evidenced by performance on the Balanced Assessment of Mathematics (BAM.)
	ST Math	Created by the MIND Research Institute, ST Math provides game- based, visual math instruction. This interactive program adapts to students' mastery as they progress through various skills and concepts targeted to their needs. ST Math focuses on improving conceptual learning and problem solving by visually representing concepts students learn during traditional instruction. Schools that use ST Math achieve at least double the growth in math proficiency than comparable schools.
Science		
Social Studies		
Other (specify)		
Grade Level:		
ELA		
Math		
Science		
Social Studies		
Other (specify)		

Exhibit B: Sample Scope and Sequence Summary

	Core Academic Program Scope and Sequence				
	ELA	**MATH**	**SCIENCE**	**SOCIAL STUDIES**	**SPANISH**
9	**English Language Arts I: Classics across genres** Higher level of analysis of the novel, drama (Shakespeare), poetry, memoir, literary elements, speeches, short stories, non-fiction, crafting an argument	**Geometry** Graphing and the relations between equations and graphs, including points, lines, polynomials, circles, and other curves, graphing inequalities, slope, properties and relations of plane figures, circles, triangles and other polygons, transformations and proofs **--OR--** **Algebra I**	**Biology I** Matter, chemical building block of life, cell structure and life processes, genetics, DNA, classification of life, evolution, human body systems, biodiversity	**Contemporary US History and Civics** WWII and the Holocaust, the Cold War, the 1950s, cultural revolutions, Civil Rights, social policy, the 80s, 9/11 and post 9/11 US, Civics	**Spanish I**
10					
11					
12					

	Non- Core Academic Program Scope and Sequence		
	PHYSICAL EDUCATION	**ACADEMIC ELECTIVES**	**FINE ARTS ELECTIVES**
9	**Health and Fitness I** Cardio, muscular development, team sports, yoga, dance, separate and co-gender sex-ed	Creative Writing Architecture	Visual Art, Choir or Band, Theatre
10			
11			
12			

Exhibit C: Sample Curriculum Map

9th Grade English Language Arts Curriculum Map			
Unit 1: Literary Elements and the Short Story (6 weeks – Aug-Sept.)			
Standards	**Objectives**	**Key Concepts/Vocabulary**	**Suggested Resources**
RL.9-10.1: Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text. **RL.9-10.5:** Analyze how an author's choices concerning how to structure a text, order events within it (e.g., parallel plots), and manipulate time (e.g., pacing, flashbacks) create such effects as mystery, tension, or surprise. **W.9-10.2:** Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content. **SL.9-10.1:** Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grades 9–10 topics, texts, and issues, building on others' ideas and expressing their own clearly and persuasively. **L.9-10.1:** Demonstrate command of the conventions of Standard English grammar and usage when writing or speaking. **L.9-10.5:** Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.	• Identify and explain plot structure (i.e., exposition, rising action, crisis/climax, falling action, resolution/denouement) in short stories. • Understand and explain why plots in short stories usually focus on a single event. • Analyze how authors create the setting in a short story. • Define the concept of theme and identify the theme(s) in stories read. • Identify and explain characterization techniques in short stories. • Identify and explain the use of figurative language in short stories. • Analyze how authors create tone in short stories. • Identify the point of view in a short story and analyze how point of view affects the reader's interpretation of the story. • Write a coherent essay of literary analysis with a clear thesis statement, at least three pieces of evidence from texts, and a strong introduction and conclusion. • Define and refine research questions; cite sources accurately, distinguishing between paraphrasing and quoting.	Reading: • Character, characterization • Figurative language • Irony (e.g., dramatic, situational, verbal) • Narrator (reliable and unreliable) • Parable • Plot (i.e., exposition, rising action, crisis/climax, falling action, resolution/ denouement) • Point of view • Sensory language • Setting • Style • Symbol, symbolism • Theme • Tone Writing: • Review parts of speech (Verbs: principal parts of verbs, especially irregular past and past participles; simple, perfect, and progressive tenses; agreement of subject and verb, especially with collective nouns Nouns: common, proper, concrete, abstract, countable, collective, compound, possessive, gerunds) • Review capitalization of common and proper nouns	"The Tell Tale Heart" by Edgar Allan Poe "The Gift of the Magi" by O Henry "New African" from *Sarah Phillips* by Andrea Lee "Between the Pool and the Gardenias" from *Krik Krak* by Edwidge Danticat
Assessments/Activities			
Literary Analysis Essay – Select a short story and write an essay that analyzes how a particular literary element plays a part			

in the essence and workings of one of the chosen stories. State your thesis clearly and include at least three pieces of evidence to support it. Your teacher may give you the opportunity to write your first draft on a shared online document and receive feedback from classmates before publication. (RL.9-10.1, W.9-10.2)

Parts of Speech Review – Select a paragraph from the novel and identify all the verbs. Name the tense of each verb you find. (L.9-10.3)

Look at a photograph, painting, or magazine advertisement for at least three minutes. On a piece of paper, draw two intersecting lines to make four squares (one for each category: people, places, things, and ideas). In each square, list the nouns by category that you see in the image. Note whether they are abstract or concrete nouns. Identify the nouns in the Language Usage Activity and determine whether they are common or proper nouns; capitalize them if necessary. (L.9-10.2, L.9-10.3)

Informative Writing - Discuss the "slow motion" depiction of the murder in Poe's "The Tell-Tale Heart" and consider how Poe's craft affects the relationship between the narrator and his victim. State your thesis clearly and include at least three pieces of evidence to support it. (RL.9-10.4, W.9-10.2)

Enrollment Summary Template

1. Complete the table below, illustrating the projected enrollment and growth plan for the school. Indicate the school year for each column and remove any rows for grades the school will not serve.

2. Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan illustrated above.

Grade Level	Number of Students					
	Year 1 20__	Year 2 20__	Year 3 20__	Year 4 20__	Year 5 20__	Capacity 20__
Pre-K						
K						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
TOTAL						

Curriculum Summary Template

Content Area	Publisher/Product	Rationale for Selection
Grade Level:		
ELA		
Math		
Science		
Social Studies		
Other (specify)		
Grade Level:		
ELA		
Math		
Science		
Social Studies		
Other (specify)		

Core Academic Program Scope and Sequence				
	ELA	**MATH**	**SCIENCE**	**SOCIAL STUDIES**	**SPANISH**
9					
10					
11					
12					

Non-Core Academic Program Scope and Sequence		
	PHYSICAL EDUCATION	**ACADEMIC ELECTIVES**	**FINE ARTS ELECTIVES**
9			
10			
11			
12			