

# Application to Create a Public Charter School

## Scoring Criteria

State law and regulation require the Tennessee Department of Education to provide “a standard application format” (Tenn. Code Ann. § 49-13-116), and “scoring criteria addressing the elements of the charter school application” (State Board of Education Rule 0520-14-01-.01(1)).

The State Board of Education has adopted Quality Charter Authorizing Standards in Policy 6.111. Standard 2(c) addresses rigorous approval criteria for the application process and decision making. This Standard provides that a quality authorizer “[r]equires all applicants to present a clear and compelling mission, a quality educational program, a demonstration of community support, a solvent and sustainable budget and contingency financial plans, a clear demonstration of the effectiveness of the model for the target student population, effective governance and management structures and systems, founding team members demonstrating diverse and necessary capabilities in all phases of the school’s development, and clear evidence of the applicant’s capacity to execute its plan successfully.” An application that merits a recommendation for approval should satisfy each of these criteria.

### ***Ratings and Criteria***

This scoring rubric is divided into subsections that correspond to the subsections of the charter application. Each subsection of the rubric identifies the characteristics of a strong response that would qualify as “Meets or Exceeds the Standard.” Evaluators will rate the responses by applying the following guidance:

Rating	Characteristics
<b>Meets or Exceeds the Standard</b>	The response reflects a thorough understanding of key issues. It clearly aligns with the mission and vision of the school. The response includes specific and accurate information that shows thorough preparation.
<b>Partially Meets Standard</b>	The response meets the criteria in some respects but lacks sufficient detail and/or requires additional information in one or more areas.
<b>Does Not Meet Standard</b>	The response is incomplete; demonstrates lack of preparation; does not align with the mission and vision of the school; or otherwise raises significant concerns about the viability of the plan or the applicant’s ability to carry it out.

Recommendations for approval or denial will be based on the written application (narrative and attachments), independent due diligence, and, if offered by the authorizer, applicant interviews. Reviewers will score each of the subsections under the four categories (academics, operations, finances, and, if applicable, performance record). A reviewer’s subsection scores for a category shall be considered collectively to determine the summary rating for that category. For an application to be deemed eligible for approval, the summary ratings for all applicable categories must be “Meets or Exceeds the Standard.” Thus, a single score of a “Does Not Meet Standard” or “Partially Meets Standard” on a subsection of a category does not necessarily prevent an otherwise satisfactory category from being scored a “Meets or Exceeds the Standard” overall. The totality of evidence reviewed should determine the overall score for each category.

**Guidance for Reviewers:**

Reviewers should use objective language and complete sentences in their comments on the strengths and weaknesses of each subsection of the application. Please also remember that all documents, including your individual review, may, at some time, be available to the public. Additional pages should be used as necessary. For example,

<b>Academic Plan and Design</b>	<b>Strengths</b>	<p>“The plan aligns with the overall mission and vision because . . .”</p> <p>“The chosen curriculum is research-based and proven effective with the targeted population of students because . . .”</p>
	<b>Weaknesses</b>	<p>“The curriculum and daily schedule do not align with the mission and vision because . . .”</p> <p>“The discipline plan does not include provisions for students with disabilities.”</p>
<b>Operations Plan and Capacity</b>	<b>Strengths</b>	<p>“The governing body is diverse and will be able to support the school effectively.”</p> <p>“The plan to recruit school leaders and teachers is robust and aligns with the mission of the school.”</p>
	<b>Weaknesses</b>	<p>“The governing body is composed of only two people who do not have sufficient credentials to support school leadership.”</p> <p>“The staffing projections do not align with the number of students or the stated mission of the school.”</p>
<b>Financial Plan and Capacity</b>	<b>Strengths</b>	<p>“The financial plan is sound, and the assumptions are consistent with the mission and vision of the proposed school.”</p> <p>“The budget assumptions include contingencies for high-dollar special needs students and funds are allocated in the budget document for such contingencies.”</p>
	<b>Weaknesses</b>	<p>“The budget assumptions include a line of credit from XYZ bank, but there is no proof such an agreement exists, and no plan to repay the line of credit when it is accessed.”</p> <p>“The proposed school assumes two buses in the first year, but there is no accompanying line item in the budget that allocates funds for purchasing buses nor is there any indication of salary and training for bus drivers.”</p>

**Instructions for Reviewers:**

1. Fill in your name and the name of the proposed school on the following page. Click once on the “Application Review” cover page. Click on the fields in the table to type.
2. Check the General Information page of the application to determine which of four application categories was used for the application.

Category		Description
1	<b>New Start Applicant</b>	Sponsor with no schools currently operating and/or authorized throughout the United States proposing the creation of a new school in Tennessee
2	<b>New Start Applicant Proposing Multiple Schools</b>	Sponsor with no schools currently and/or previously operating and/or authorized in Tennessee or throughout the United States proposing the creation of two or more schools within the same application cycle.
3	<b>Out of State Sponsor</b>	Sponsor with at least one school currently and/or previously operating outside of Tennessee and no schools currently authorized in Tennessee proposing to create a school in Tennessee.
	<b>Existing Tennessee Sponsor Proposing a New School with Change in Focus / Grade Structure</b>	Sponsor with at least one school currently and/or previously authorized in Tennessee proposing to create a new school with a change in focus and/or grade structure from the existing school
4	<b>Existing Tennessee Sponsor Proposing to Replicate an Existing School</b>	Sponsor with at least one school currently and/or previously operating in Tennessee proposing to start a new school with no material change in focus or grade structure from an existing school.

3. Use the tables on the following pages to identify which subsections the applicant should have completed based on their application category.
4. For each required subsection of the application, you should do the following during your initial individual analysis of the proposal:
  - a. Select a rating for each subsection. Click once on the box to select. If you are not able to check the box, please HIGHLIGHT your selection.
  - b. Use the “Strengths” area to identify notable positive aspects of the response. Be sure to include page references where applicable.
  - c. Use the “Concerns/Questions” area to identify weaknesses and areas that should be explored during the debrief calls and/or capacity interview. Again, reference relevant page numbers.
5. Complete the summary page for each major category (academic, operations, financial, and performance (if applicable)) after you have completed all of the subsections within the category. Type a summary of your analysis of each category into the box provided; it will expand as needed. This should be a paragraph outlining

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the overall strengths or weaknesses of the category as a whole. It should summarize your findings and should not be simply copied from your subsection analysis.

6. Use the “Final Application Review” area to provide your final evaluation of each subsection based on the complete application record (initial proposal, due diligence, capacity interview, and amended application, if applicable). This analysis should support the final rating you select.
7. Complete the “Final Application Review” area on the summary page for each major category. Document any additional evidence gathered during due diligence, the capacity interview and/or amended application and indicate your final rating for each major category.

### Category 1 Applicant Completeness Checklist

General Information	
Cover Sheet	<input type="checkbox"/>
Assurances	<input type="checkbox"/>
Executive Summary	<input type="checkbox"/>
1.1 - School Mission and Vision	
Narrative	<input type="checkbox"/>
1.2 - Enrollment Summary	
Narrative	<input type="checkbox"/>
Table 1	<input type="checkbox"/>
Table 2	<input type="checkbox"/>
1.3 - Academic Focus and Plan	
Narrative	<input type="checkbox"/>
Attachment A	<input type="checkbox"/>
1.4 - Academic Performance Standards	
Narrative	<input type="checkbox"/>
1.5 - Assessments	
Narrative	<input type="checkbox"/>
1.6 - School Calendar and Schedule	
Narrative	<input type="checkbox"/>
Attachment B	<input type="checkbox"/>
Attachment C	<input type="checkbox"/>
1.7 - Special Populations	
Narrative	<input type="checkbox"/>
1.8 - School Culture and Discipline	
Narrative	<input type="checkbox"/>
Attachment D	<input type="checkbox"/>
Attachment E	<input type="checkbox"/>
1.9 - Recruitment and Enrollment	
Narrative	<input type="checkbox"/>
Attachment F	<input type="checkbox"/>
1.10 - Parent and Community Engagement and Support	
Narrative	<input type="checkbox"/>
Attachment G	<input type="checkbox"/>
<b>1.11 - Phase-In / Turnaround Planning</b> <i>Required if proposing the conversion of a school</i>	
Narrative	<input type="checkbox"/>
<b>1.12 - High School Graduation &amp; Postsecondary Readiness</b> <i>Required if proposing a high school</i>	
Narrative	<input type="checkbox"/>

2.1- Governance	
Narrative	<input type="checkbox"/>
Table 3: Board Members	<input type="checkbox"/>
Attachment H	<input type="checkbox"/>
Attachment I	<input type="checkbox"/>
Attachment J	<input type="checkbox"/>
Attachment K	<input type="checkbox"/>
Attachment L	<input type="checkbox"/>
Attachment M	<input type="checkbox"/>
Attachment N	<input type="checkbox"/>
2.2 - Start-Up Plan	
Narrative	<input type="checkbox"/>
2.3 - Facilities	
Narrative	<input type="checkbox"/>
2.4 - Personnel / Human Capital	
Narrative	<input type="checkbox"/>
Attachment O	<input type="checkbox"/>
Attachment P	<input type="checkbox"/>
Attachment Q	<input type="checkbox"/>
Attachment R	<input type="checkbox"/>
Attachment S	<input type="checkbox"/>
Table 4: Staffing Chart	<input type="checkbox"/>
2.5 - Professional Development	
Narrative	<input type="checkbox"/>
2.6 - Insurance	
Narrative	<input type="checkbox"/>
Attachment T	<input type="checkbox"/>
2.7 - Transportation	
Narrative	<input type="checkbox"/>
2.8 - Food Service	
Narrative	<input type="checkbox"/>
2.9 - Additional Operations	
Narrative	<input type="checkbox"/>
<b>2.10 - Charter Management Organizations</b> <i>Required if contracting or partnering with CMO</i>	
Narrative	<input type="checkbox"/>
Attachment U	<input type="checkbox"/>
3.1 – Planning and Budget Worksheet	
Attachment AA	<input type="checkbox"/>
3.2 – Budget Narrative	
Narrative	<input type="checkbox"/>
Attachment BB	<input type="checkbox"/>

### Category 2 Applicant Completeness Checklist

General Information		2.1- Governance		2.11 – Network Vision, Growth Plan & Capacity	
Cover Sheet	<input type="checkbox"/>	Narrative	<input type="checkbox"/>	Narrative	<input type="checkbox"/>
Assurances	<input type="checkbox"/>	Table 3: Board Members	<input type="checkbox"/>	Attachment V	<input type="checkbox"/>
Executive Summary	<input type="checkbox"/>	Attachment H	<input type="checkbox"/>	2.12 – Network Management	
1.1 - School Mission and Vision		Attachment I	<input type="checkbox"/>	Narrative	<input type="checkbox"/>
Narrative	<input type="checkbox"/>	Attachment J	<input type="checkbox"/>	Attachment W	<input type="checkbox"/>
1.2 - Enrollment Summary		Attachment K	<input type="checkbox"/>	Attachment X	<input type="checkbox"/>
Narrative	<input type="checkbox"/>	Attachment L	<input type="checkbox"/>	Attachment Y	<input type="checkbox"/>
Table 1	<input type="checkbox"/>	Attachment M	<input type="checkbox"/>	Table 5	<input type="checkbox"/>
Table 2	<input type="checkbox"/>	Attachment N	<input type="checkbox"/>	2.13 – Network Governance	
1.3 - Academic Focus and Plan		2.2 - Start-Up Plan		Narrative	<input type="checkbox"/>
Narrative	<input type="checkbox"/>	Narrative	<input type="checkbox"/>	2.14 – Network Wide Personnel & Human Capital Projections	
Attachment A	<input type="checkbox"/>	2.3 - Facilities		Narrative	<input type="checkbox"/>
1.4 - Academic Performance Standards		Narrative	<input type="checkbox"/>	Table 6	<input type="checkbox"/>
Narrative	<input type="checkbox"/>	2.4 - Personnel / Human Capital		Table 7	<input type="checkbox"/>
1.5 - Assessments		Narrative	<input type="checkbox"/>	Table 8	<input type="checkbox"/>
Narrative	<input type="checkbox"/>	Attachment O	<input type="checkbox"/>	Table 9	<input type="checkbox"/>
1.6 - School Calendar and Schedule		Attachment P	<input type="checkbox"/>	Table 10	<input type="checkbox"/>
Narrative	<input type="checkbox"/>	Attachment Q	<input type="checkbox"/>	3.1 – Planning and Budget Worksheet	
Attachment B	<input type="checkbox"/>	Attachment R	<input type="checkbox"/>	Attachment AA	<input type="checkbox"/>
Attachment C	<input type="checkbox"/>	Attachment S	<input type="checkbox"/>	3.2 – Budget Narrative	
1.7 - Special Populations		Table 4: Staffing Chart	<input type="checkbox"/>	Narrative	<input type="checkbox"/>
Narrative	<input type="checkbox"/>	2.5 - Professional Development		Attachment BB	<input type="checkbox"/>
1.8 - School Culture and Discipline		Narrative	<input type="checkbox"/>	3.3 – Network Financial Plan	
Narrative	<input type="checkbox"/>	2.6 - Insurance		Narrative	<input type="checkbox"/>
Attachment D	<input type="checkbox"/>	Narrative	<input type="checkbox"/>	Attachment CC	<input type="checkbox"/>
Attachment E	<input type="checkbox"/>	Attachment T	<input type="checkbox"/>	3.1 – Planning and Budget Worksheet	
1.9 - Recruitment and Enrollment		2.7 - Transportation		Attachment AA	<input type="checkbox"/>
Narrative	<input type="checkbox"/>	Narrative	<input type="checkbox"/>	3.2 – Budget Narrative	
Attachment F	<input type="checkbox"/>	2.8 - Food Service		Narrative	<input type="checkbox"/>
1.10 - Parent and Community Engagement and Support		Narrative	<input type="checkbox"/>	3.3 – Network Financial Plan	
Narrative	<input type="checkbox"/>	2.9 - Additional Operations		Attachment BB	<input type="checkbox"/>
Attachment G	<input type="checkbox"/>	Narrative	<input type="checkbox"/>	3.1 – Planning and Budget Worksheet	
1.11 - Phase-In / Turnaround Planning <i>Required if proposing a school conversion</i>		2.10 - Charter Management Organizations <i>Required if partnering with a CMO</i>		3.2 – Budget Narrative	
Narrative	<input type="checkbox"/>	Narrative	<input type="checkbox"/>	Narrative	<input type="checkbox"/>
1.12 - High School Graduation & Postsecondary Readiness <i>Required if proposing a high school</i>		Attachment U	<input type="checkbox"/>	3.3 – Network Financial Plan	
Narrative	<input type="checkbox"/>	2.9 - Additional Operations		3.3 – Network Financial Plan	

### Category 3 Applicant Completeness Checklist

General Information	
Cover Sheet	<input type="checkbox"/>
Assurances	<input type="checkbox"/>
Executive Summary	<input type="checkbox"/>
1.1 - School Mission and Vision	
Narrative	<input type="checkbox"/>
1.2 - Enrollment Summary	
Narrative	<input type="checkbox"/>
Table 1	<input type="checkbox"/>
Table 2	<input type="checkbox"/>
1.3 - Academic Focus and Plan	
Narrative	<input type="checkbox"/>
Attachment A	<input type="checkbox"/>
1.4 - Academic Performance Standards	
Narrative	<input type="checkbox"/>
1.5 - Assessments	
Narrative	<input type="checkbox"/>
1.6 - School Calendar and Schedule	
Narrative	<input type="checkbox"/>
Attachment B	<input type="checkbox"/>
Attachment C	<input type="checkbox"/>
1.7 - Special Populations	
Narrative	<input type="checkbox"/>
1.8 - School Culture and Discipline	
Narrative	<input type="checkbox"/>
Attachment D	<input type="checkbox"/>
Attachment E	<input type="checkbox"/>
1.9 - Recruitment and Enrollment	
Narrative	<input type="checkbox"/>
Attachment F	<input type="checkbox"/>
1.10 - Parent and Community Engagement and Support	
Narrative	<input type="checkbox"/>
Attachment G	<input type="checkbox"/>
<b>1.11 - Phase-In / Turnaround Planning</b> <i>Required if proposing the conversion of a school</i>	
Narrative	<input type="checkbox"/>
<b>1.12 - High School Graduation &amp; Postsecondary Readiness</b> <i>Required if proposing a high school</i>	
Narrative	<input type="checkbox"/>

2.1- Governance	
Narrative	<input type="checkbox"/>
Table 3: Board Members	<input type="checkbox"/>
Attachment H	<input type="checkbox"/>
Attachment I	<input type="checkbox"/>
Attachment J	<input type="checkbox"/>
Attachment K	<input type="checkbox"/>
Attachment L	<input type="checkbox"/>
Attachment M	<input type="checkbox"/>
Attachment N	<input type="checkbox"/>
2.2 - Start-Up Plan	
Narrative	<input type="checkbox"/>
2.3 - Facilities	
Narrative	<input type="checkbox"/>
2.4 - Personnel / Human Capital	
Narrative	<input type="checkbox"/>
Attachment O	<input type="checkbox"/>
Attachment P	<input type="checkbox"/>
Attachment Q	<input type="checkbox"/>
Attachment R	<input type="checkbox"/>
Attachment S	<input type="checkbox"/>
Table 4: Staffing Chart	<input type="checkbox"/>
2.5 - Professional Development	
Narrative	<input type="checkbox"/>
2.6 - Insurance	
Narrative	<input type="checkbox"/>
Attachment T	<input type="checkbox"/>
2.7 - Transportation	
Narrative	<input type="checkbox"/>
2.8 - Food Service	
Narrative	<input type="checkbox"/>
2.9 - Additional Operations	
Narrative	<input type="checkbox"/>
<b>2.10 - Charter Management Organizations</b> <i>Required if contracting or partnering with CMO</i>	
Narrative	<input type="checkbox"/>
Attachment U	<input type="checkbox"/>

2.11 – Network Vision, Growth Plan & Capacity	
Narrative	<input type="checkbox"/>
Attachment V	<input type="checkbox"/>
2.12 – Network Management	
Narrative	<input type="checkbox"/>
Attachment W	<input type="checkbox"/>
Attachment X	<input type="checkbox"/>
Attachment Y	<input type="checkbox"/>
Table 5	<input type="checkbox"/>
2.13 – Network Governance	
Narrative	<input type="checkbox"/>
2.14 – Network Wide Personnel & Human Capital Projections	
Narrative	<input type="checkbox"/>
Table 6	<input type="checkbox"/>
Table 7	<input type="checkbox"/>
Table 8	<input type="checkbox"/>
Table 9	<input type="checkbox"/>
Table 10	<input type="checkbox"/>
3.1 – Planning and Budget Worksheet	
Attachment AA	<input type="checkbox"/>
3.2 – Budget Narrative	
Narrative	<input type="checkbox"/>
Attachment BB	<input type="checkbox"/>
3.3 – Network Financial Plan	
Narrative	<input type="checkbox"/>
Attachment CC	<input type="checkbox"/>
4.1 Portfolio Summary	
Attachment DD	<input type="checkbox"/>
4.2 Performance Record: Academics	
Narrative	<input type="checkbox"/>
Attachment EE	<input type="checkbox"/>
Attachment FF	<input type="checkbox"/>
4.3 – Performance Record: Operations	
Narrative	<input type="checkbox"/>
Attachment GG	<input type="checkbox"/>
Attachment HH	<input type="checkbox"/>
Attachment II	<input type="checkbox"/>
Attachment JJ	<input type="checkbox"/>
Attachment KK	<input type="checkbox"/>
4.4 – Performance Record: Fiscal	
Narrative	<input type="checkbox"/>
Attachment LL	<input type="checkbox"/>

### Category 4 Applicant Completeness Checklist

Category 4 Applicant Completeness Checklist		
General Information	2.1- Governance	2.12 – Network Management
Cover Sheet <input type="checkbox"/>	Narrative <input type="checkbox"/>	Narrative <input type="checkbox"/>
Assurances <input type="checkbox"/>	Table 3: Board Members <input type="checkbox"/>	Attachment W <input type="checkbox"/>
Executive Summary <input type="checkbox"/>	Attachment H <input type="checkbox"/>	Attachment X <input type="checkbox"/>
1.1 - School Mission and Vision	Attachment I <input type="checkbox"/>	Attachment Y <input type="checkbox"/>
Narrative <input type="checkbox"/>	Attachment J <input type="checkbox"/>	Table 5 <input type="checkbox"/>
1.2 - Enrollment Summary	Attachment K <input type="checkbox"/>	2.13 – Network Governance
Narrative <input type="checkbox"/>	Attachment L <input type="checkbox"/>	Narrative <input type="checkbox"/>
Table 1 <input type="checkbox"/>	Attachment M <input type="checkbox"/>	2.14 – Network Wide Personnel & Human Capital Projections
Table 2 <input type="checkbox"/>	Attachment N <input type="checkbox"/>	Narrative <input type="checkbox"/>
1.3 - Academic Focus and Plan	2.2 - Start-Up Plan	Table 6 <input type="checkbox"/>
Narrative <input type="checkbox"/>	Narrative <input type="checkbox"/>	Table 7 <input type="checkbox"/>
Attachment A <input type="checkbox"/>	2.3 - Facilities	Table 8 <input type="checkbox"/>
1.4 - Academic Performance Standards	Narrative <input type="checkbox"/>	Table 9 <input type="checkbox"/>
Narrative <input type="checkbox"/>	2.4 - Personnel / Human Capital	Table 10 <input type="checkbox"/>
1.5 - Assessments	Narrative <input type="checkbox"/>	2.15 – School Replication
Narrative <input type="checkbox"/>	Attachment O <input type="checkbox"/>	Narrative <input type="checkbox"/>
1.6 - School Calendar and Schedule	Attachment P <input type="checkbox"/>	Attachment Z <input type="checkbox"/>
Narrative <input type="checkbox"/>	Attachment Q <input type="checkbox"/>	3.1 – Planning and Budget Worksheet
Attachment B <input type="checkbox"/>	Attachment R <input type="checkbox"/>	Attachment AA <input type="checkbox"/>
Attachment C <input type="checkbox"/>	Attachment S <input type="checkbox"/>	3.2 – Budget Narrative
1.7 - Special Populations	Table 4: Staffing Chart <input type="checkbox"/>	Narrative <input type="checkbox"/>
Narrative <input type="checkbox"/>	2.5 - Professional Development	Attachment BB <input type="checkbox"/>
1.8 - School Culture and Discipline	Narrative <input type="checkbox"/>	3.3 – Network Financial Plan
Narrative <input type="checkbox"/>	2.6 – Insurance	Narrative <input type="checkbox"/>
Attachment D <input type="checkbox"/>	Narrative <input type="checkbox"/>	Attachment CC <input type="checkbox"/>
Attachment E <input type="checkbox"/>	Attachment T <input type="checkbox"/>	4.1 Portfolio Summary
1.9 - Recruitment and Enrollment	2.7 – Transportation	Attachment DD <input type="checkbox"/>
Narrative <input type="checkbox"/>	Narrative <input type="checkbox"/>	4.2 Performance Record: Academics
Attachment F <input type="checkbox"/>	2.8 - Food Service	Narrative <input type="checkbox"/>
1.10 - Parent and Community Engagement and Support	Narrative <input type="checkbox"/>	Attachment EE <input type="checkbox"/>
Narrative <input type="checkbox"/>	2.9 - Additional Operations	Attachment FF <input type="checkbox"/>
Attachment G <input type="checkbox"/>	Narrative <input type="checkbox"/>	4.3 – Performance Record: Operations
1.11 - Phase-In / Turnaround Planning <i>Required if proposing the conversion of a school</i>	2.10 - Charter Management Organizations <i>Required if contracting or partnering with CMO</i>	Narrative <input type="checkbox"/>
Narrative <input type="checkbox"/>	Narrative <input type="checkbox"/>	Attachment GG <input type="checkbox"/>
1.12 - High School Graduation & Postsecondary Readiness <i>Required if proposing a high school</i>	Attachment U <input type="checkbox"/>	Attachment HH <input type="checkbox"/>
Narrative <input type="checkbox"/>	2.11 – Network Vision, Growth Plan & Capacity	Attachment II <input type="checkbox"/>
	Narrative <input type="checkbox"/>	Attachment JJ <input type="checkbox"/>
	Attachment V <input type="checkbox"/>	Attachment KK <input type="checkbox"/>
		4.4 – Performance Record: Fiscal
		Narrative <input type="checkbox"/>
		Attachment LL <input type="checkbox"/>



# Tennessee Public Charter School

## Application Scoring Reviewer Template

Your comments and evidence are at least as significant as your rating. Please also remember that all documents, including your individual review, may at some time be available to the public.

<b>Evaluator Name</b>				
<b>Proposed School Name</b>				
<b>Application Category</b>	<input type="checkbox"/> Category 1	<input type="checkbox"/> Category 2	<input type="checkbox"/> Category 3	<input type="checkbox"/> Category 4

### Executive Summary

<b>Application includes an Executive Summary</b>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
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**Section 1: Academic Plan and Design**

**1.1 School Mission and Vision**

**Characteristics of a Strong Response:**

- The mission statement is clear, concise, compelling and measurable.
- The applicant clearly links the mission and vision to at least 3 of the purposes for charter schools found in Tenn. Code Ann. § 49-13- 102(a).
- When achieving its mission, the school, as described by the applicant, will offer a strong curriculum and a range of opportunities to all students and will close achievement gaps.
- The innovations described by the applicant are supported by evidence of success.

**Initial Application Review**

<input type="checkbox"/>	Meets or Exceeds Standard	<input type="checkbox"/>	Partially Meets Standard	<input type="checkbox"/>	Does Not Meet Standard
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**Section Strengths**

Reference	Page

**Concerns / Questions**

Reference	Page

**Final Application Review**

<input type="checkbox"/>	Meets or Exceeds Standard	<input type="checkbox"/>	Partially Meets Standard	<input type="checkbox"/>	Does Not Meet Standard
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**Section Strengths**

Reference	Page

**Concerns / Questions**

Reference	Page

**Section 1: Academic Plan and Design**

**1.2 Enrollment Summary**

**Characteristics of a Strong Response:**

- The applicant clearly describes the community from which the school intends to draw students, including demographics, school zones and academic performance of existing schools.
- The applicant provides a sound rationale for selecting the community where the school will be located.
- The enrollment summary and demographics charts are complete and contain reasonable enrollment projections.
- For sponsors of an existing school, the use of different enrollment practices is clearly explained.

**Initial Application Review**

<input type="checkbox"/>	Meets or Exceeds Standard	<input type="checkbox"/>	Partially Meets Standard	<input type="checkbox"/>	Does Not Meet Standard
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**Section Strengths**

Reference	Page

**Concerns / Questions**

Reference	Page

**Final Application Review**

<input type="checkbox"/>	Meets or Exceeds Standard	<input type="checkbox"/>	Partially Meets Standard	<input type="checkbox"/>	Does Not Meet Standard
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**Section Strengths**

Reference	Page

**Concerns / Questions**

Reference	Page

**Section 1: Academic Plan and Design**

**1.3 Academic Focus and Plan**

**Characteristics of a Strong Response:**

- The school's academic focus aligns with the school's mission and vision.
- The academic plan is rigorous and research-based, addresses the needs of the targeted student population, and implements the school's academic focus.
- The curriculum is robust, supports the growth of all students, and is aligned with Tennessee State Standards.
- The applicant clearly describes an evidence-based plan to help remediate students' academic underperformance.
- [If plan includes blended learning], the applicant clearly explains the model the school will use and the role of teachers within the blended learning environment.
- [Cat3][Cat4] Identifies key features of the proposed academic plan that will differ from the sponsor's existing schools and a strong rationale for these variances.

**Initial Application Review**

<input type="checkbox"/>	Meets or Exceeds Standard	<input type="checkbox"/>	Partially Meets Standard	<input type="checkbox"/>	Does Not Meet Standard
--------------------------	---------------------------	--------------------------	--------------------------	--------------------------	------------------------

**Section Strengths**

Reference	Page

**Concerns / Questions**

Reference	Page

**Final Application Review**

<input type="checkbox"/>	Meets or Exceeds Standard	<input type="checkbox"/>	Partially Meets Standard	<input type="checkbox"/>	Does Not Meet Standard
--------------------------	---------------------------	--------------------------	--------------------------	--------------------------	------------------------

**Section Strengths**

Reference	Page

**Concerns / Questions**

Reference	Page

**Section 1: Academic Plan and Design**

**1.4 Academic Performance Standards**

**Characteristics of a Strong Response:**

- Academic achievement goals are rigorous, measurable, and realistic and set high standards and high expectations for student learning.
- Academic goals support the mission and vision of the school.
- Academic goals align with achievement goals within the authorizer/state model performance framework
- Academic goals are aligned with the proposed community the school intends to serve.
- The applicant outlines a distinct process for measuring, monitoring, and revising academic achievement goals.
- There is an appropriate, well-defined corrective action plan to be implemented if the school falls below state, district and/or its own academic achievement goals.
- The applicant outlines a strong plan for Response to Instruction and Intervention (RTI<sup>2</sup>) that aligns with Tennessee guidelines.
- Student attendance goals are realistic and plans to ensure high rates of student attendance and address chronic absenteeism are clearly outlined.
- The school's promotion/retention and exit policies and standards are rigorous and clearly defined.
- [If elementary] The applicant outlines a strong plan for ensuring 3rd graders receive proper tutoring, remediation, support, and summer school.

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**Section 1: Academic Plan and Design**

**1.5 Assessments**

**Characteristics of a Strong Response:**

- Internal assessments will provide rich data for evaluation of the academic program and align with state standards.
- A process for collecting, analyzing and using data to support instruction is clearly articulated, with detailed plans presented to provide adequate training for teachers and school leaders.
- [If elementary] The application includes evidence of a universal reading screener.

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**Section 1: Academic Plan and Design**

**1.6 School Calendar and Schedule**

**Characteristics of a Strong Response:**

- The school calendar (Attachment B) and student schedules (Attachment C) meet Tennessee minimum requirements of the equivalent of 180 days of instruction.
- The applicant explains how the calendar and schedule will be optimal for student learning under its academic plan.
- Tiered interventions, tutoring, enrichment and extra-curricular activities are built into the school schedule.
- Any proposal for Saturday School, summer school, or after school programming is reasonable.

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**Section 1: Academic Plan and Design**

**1.7 Special Populations**

**Characteristics of a Strong Response:**

- The leadership team has strong experience working with special populations.
- The applicant describes a realistic plan for hiring qualified personnel and adapting the school schedule to address the needs of special populations.
- There is a clear process for identifying students with disabilities, English Learners, at-risk students, and gifted students.
- The applicant outlines a viable plan identifies what instructional programs, practices, and strategies that ensure access to the general education curriculum and academic success will be provided for:
  - students with disabilities,
  - English Learners,
  - at-risk students and
  - gifted students
- The applicant has well-defined plans for monitoring and evaluating progress and exiting students.

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**Section 1: Academic Plan and Design**

**1.8 School Culture and Discipline**

**Characteristics of a Strong Response:**

- The applicant outlines a clear vision for school culture or ethos that will promote a positive academic environment and will reflect high levels of academic expectation and support.
- The applicant provides a coherent plan for creating and sustaining the intended culture for all students, teachers, administrators, and parents.
- The applicant outlines a clear plan for integrating new students and families as they arrive.
- The Student Handbook (Attachment D) includes relevant, comprehensive, and legally sound policies.
- The student discipline policy (Attachment E if not already included in Attachment D):
  - provides strategies that includes both infractions and incentives for positive behavior
  - provides effective and legally sound procedures to support a safe, orderly school climate and strong school culture;
  - identifies how policy will respect student rights.

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**Section 1: Academic Plan and Design**

**1.9 Recruitment and Enrollment**

**Characteristics of a Strong Response:**

- The applicant’s enrollment policy (Attachment F) complies with state law and district policies.
- The applicant outlines a compelling community outreach plan that is likely to foster demand and community support.
- Applicant’s student recruitment and marketing plan, timeline, and enrollment policy will provide equal access to all interested students and families, including those in poverty, academically low-achieving students, students with disabilities, and English learners.

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**Section 1: Academic Plan and Design**

**1.10 Parent and Community Engagement and Support**

**Characteristics of a Strong Response:**

- There is evidence that community feedback is incorporated in the application.
- There are sufficient letters of support, including those within the local community, evidence of outreach to parents, MOUs, or contracts with community partners (Attachment G) that demonstrate support from the community, and which includes compelling support from community members intending to enroll in the school.
- The applicant outlines a sound and compelling plan for engaging parents and community partners prior to the school's opening and throughout the life of the school.
- The applicant has a well-defined plan for informing and educating parents on school policies.

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**Section 1: Academic Plan and Design**

**1.11 Phase-In / Turnaround Planning (if applicable)**

**Characteristics of a Strong Response:**

- The applicant has strong prior experience in turning around or converting an underperforming school, or a plan for doing so if the applicant does not have prior experience.
- There is a detailed plan for engaging the neighborhood, community, and student population prior to conversion.
- The applicant identifies specific ways to transform the existing school culture while respecting the school's history.
- If proposing a phase-in approach, the applicant clearly describes how transition to a shared campus will occur with regard to campus collaboration and building-wide issues.
- If proposing a full school take-over approach, the applicant outlines a realistic transition plan focused on communicating with existing staff.

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**Section 1: Academic Plan and Design**

**1.12 High School Graduation and Postsecondary Readiness (if applicable)**

**Characteristics of a Strong Response:**

- The applicant provides a plan for meeting the Tennessee graduation requirements (including credits, transcripts, electives, and GPA calculation) and a compelling explanation of any additional requirements beyond the State’s requirements.
- The applicant clearly and persuasively explains how the school’s graduation requirements will ensure student readiness for college or other postsecondary opportunities.
- The applicant outlines effective systems and structures to address students at risk of dropping out or not meeting graduation requirements.

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# Summary Rating

## Section 1: Academic Plan and Design

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply copied from your subsection analysis.

Initial Application Review		
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Academic Plan and Design Strengths		
<b>Summary Comments</b>		
Academic Plan and Design Weakness/Questions		
<b>Summary Comments</b>		

Final Application Review		
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Academic Plan and Design Strengths		
<b>Summary Comments</b>		
Academic Plan and Design Weakness/Questions		
<b>Summary Comments</b>		

**Section 2: Operations Plan and Capacity**

**2.1 Governance**

**Characteristics of a Strong Response:**

- The proposed board structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and financials.
- The proposed board members offer a wide range of knowledge and skills needed to oversee a successful charter school, including, but not limited to, educational, financial, legal, and community expertise.
- The applicant provides initial and ongoing board training as required by law.
- There is a clear, fair, and transparent process for hearing and handling complaints.
- Governance documents (Attachments H, I, J, K, L, M, and N) are complete and align with state laws and district policies.

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**Section 2: Operations Plan and Capacity**

**2.2 Start-Up Plan**

**Characteristics of a Strong Response:**

- The applicant provides a detailed and realistic timeline for starting the school that aligns with the start-up budget.
- The applicant adequately addresses potential challenges.

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**Section 2: Operations Plan and Capacity**

**2.3 Facilities**

**Characteristics of a Strong Response:**

- Facility plans provide sufficient space for the educational program and anticipated student population and reasonably align with the budget.
- The applicant demonstrates expertise in facilities acquisition and management, either internal or external.
- The applicant outlines a sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for, a facility.
- The applicant has identified a realistic facility contingency plan.

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**Section 2: Operations Plan and Capacity**

**2.4 Personnel / Human Capital**

**Characteristics of a Strong Response:**

- The school’s organizational chart (Attachment O, and P) clearly delineates the roles and reporting structure of the Board, staff, any related bodies (such as advisory bodies or parent/educator councils), and any external organizations that will play a role in managing the school.
- Recruitment and hiring strategy, criteria, timeline, and procedures are likely to result in a strong school leader and key staff. Identified leaders have the necessary qualifications, competencies, and capacity for their assigned roles.
- The individual responsible for academic programming has a strong track record of driving student achievement (Attachment Q).
- Recruiting and hiring practices ensure proper licensure and are likely to result in a diverse leadership team and staff that reflect the student body and community.
- Compensation packages are likely to attract and retain qualified staff.
- The applicant provides a detailed plan for supporting, developing, and annually evaluating school leadership and teachers that aligns with statewide evaluation requirements.
- The applicant has a plan for addressing unsatisfactory leadership/teacher performance and turnover.
- The employee manual and personnel policies (Attachment S) are complete and effective.
- Staffing projections for each year are robust, aligned with the educational program and conducive to the school’s success.

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**Section 2: Operations Plan and Capacity**

**2.5 Professional Development**

**Characteristics of a Strong Response:**

- Professional development opportunities and scheduling effectively support the education program and are likely to maximize success in improving student achievement.
- The applicant proposes a thoughtful plan for professional development to address special and diverse populations.
- The professional development plan supports professional growth, generates collaboration, and cultivates future leadership.

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**Section 2: Operations Plan and Capacity**

**2.6 Insurance**

**Characteristics of a Strong Response:**

- The applicant plans to secure comprehensive and adequate insurance coverage for the charter school, including workers’ compensation, employer liability, property, professional liability, surety bonds, sexual abuse and any other required coverage.
- The insurance company letter (Attachment T) confirms that required coverage will be provided upon approval of the charter school application.

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**Section 2: Operations Plan and Capacity**

**2.7 Transportation**

**Characteristics of a Strong Response:**

- The applicant’s transportation plan includes anticipated routes, extracurricular activities, and Saturday school, where applicable.
- The applicant has a sound plan for oversight of its transportation operations.
- The applicant has a plan for transporting special needs students where necessary.
- The applicant demonstrates familiarity with state and federal regulations relating to the provision of transportation services to students.

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**2.8 Food Service**

**Characteristics of a Strong Response:**

- The applicant provides a clear description of how the school will offer food service to all students, adhering to state and federal regulations and nutritional guidelines.
- The applicant explains how it will collect free and reduced-price lunch information from families.

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**Section 2: Operations Plan and Capacity**

**2.9 Additional Operations**

**Characteristics of a Strong Response:**

- The applicant provides a detailed plan for using technology within the classroom and for state assessments.
- The applicant provides a compelling data management plan that protects the privacy of student information.
- The applicant demonstrates an understanding of health and safety requirements that includes a plan for hiring a registered nurse.
- The applicant outlines detailed safety and security plans for students, staff, guests, and property.
- The applicant specifies a maintenance plan for school facilities.

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**2.10 Charter Management Organization**

**Characteristics of a Strong Response:**

- If the school plans to contract with a CMO, the applicant describes the service provider’s educational and management success and the rationale and process for selecting the CMO.
- There is a clear division of roles between the board and the CMO.
- There is a viable plan for identifying and managing potential conflicts of interest with the CMO, and any existing or potential conflicts of interest are disclosed and explained.
- If available, the CMO agreement (Attachment U) clearly articulates the proposed key terms, including roles and responsibilities of the school governing board, the school staff, and the service provider; the services and resources to be provided; performance-evaluation measures and mechanisms; detailed explanation of compensation to be paid to the
- provider; financial controls and oversight; investment disclosure; methods of contract oversight and enforcement; and conditions for contract renewal and termination

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**Section 2: Operations Plan and Capacity**

**2.11 Network Vision, Growth Plan & Capacity**

**Characteristics of a Strong Response:**

- The applicant provides a detailed strategic vision for the network that includes a robust five-year network growth plan. The growth plan includes the following: proposed years of opening; number and types of schools; a clear, detailed outline of any pending applications (whether in the same LEA, Tennessee or another state); all current and/or targeted markets/communities and criteria for selecting them; and projected enrollments.
- There is strong, compelling evidence of organizational capacity to open and operate high quality schools in Tennessee and elsewhere, including specific timelines for building organizational capacity.
- The applicant clearly describes results of past replication efforts, including how the network has addressed challenges.
- There is a realistic presentation of anticipated challenges and risks over the next five years associated with opening additional schools, along with a plan to overcome them to achieve the organization’s stated outcomes.
- The applicant provides a comprehensive annual report for the network (Attachment V).

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**Section 2: Operations Plan and Capacity**

**2.12 Network Management**

**Characteristics of a Strong Response:**

- The leadership team is identified, together with their roles and responsibilities.
- As Attachment W, X and Y, organizational charts for Year 1, Year 3, and Year 5 clearly delineate roles and responsibilities of the governing board, including lines of authority between the board, school leadership, and staff. If applicable, the chart includes other related bodies (advisory bodies or parent-teacher councils) and a charter management organization.
- The applicant identifies any shared or centralized support services to be provided by the network, along with their costs and methods of allocation across the network.
- The applicant clearly identifies in the table the allocation of decision-making responsibilities between the school and network.

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**Section 2: Operations Plan and Capacity**

**2.13 Network Governance**

**Characteristics of a Strong Response:**

- **If there is a network board that operates as the main governing body with each school having an advisory committee:**
  - Applicant provides a complete description of the governance structure at the network level and delineates how that relates to each individual school within the network.
  - Applicant provides a robust plan for ensuring there is adequate local/Tennessee stakeholder representation.
  - The roles and responsibilities of this board are described clearly and concisely.
  - Applicant describes the current size and composition of the governing board, with a rationale of how the current/proposed governance structure and composition will ensure the desired outcomes of a network of highly effective schools.
  - There is a clear and compelling plan to evaluate academic and operational success, including the evaluation of the school and school leader(s).
- **If there is one governing board for all schools at the local level:**
  - Applicant provides a clear, detailed description of the governance structure at the network level and how it relates to the individual school, including any changes that will take place at the board level for it to be effective (if necessary).
  - A copy of the by-laws and organizational chart is included.
  - There is a clear, thorough plan to transform the board’s membership, mission and by-laws to support the expansion plan. The plan should include a timeline for the transition and orientation of the board to its new responsibilities.
  - There is a plan in place for board training as required by Tennessee law.

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**2.14 Network Wide Personnel & Human Capital Projections**

**Characteristics of a Strong Response:**

- Network staffing projections for each year are robust and aligned with the educational program and are conducive to the school's success.

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**Section 2: Operations Plan and Capacity**

**2.15 School Replication**

**Characteristics of a Strong Response:**

- The written statement provided clearly affirm eligibility with all 5 requirements to complete a replication application.
- The original application (Attachment Z) has been provided and includes all sections and answers all questions currently in the new creation template.

**Initial Application Review**

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# Summary Rating

## Section 2: Operations Plan and Capacity

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply copied from your subsection analysis.

Initial Application Review		
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<input type="checkbox"/>	Does Not Meet Standard	
Operations Plan and Capacity Strengths		
Summary Comments		
Operations Plan and Capacity Weakness/Questions		
Summary Comments		

Final Application Review		
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<input type="checkbox"/>	Partially Meets Standard	<input type="checkbox"/>
<input type="checkbox"/>	Does Not Meet Standard	
Operations Plan and Capacity Strengths		
Summary Comments		
Operations Plan and Capacity Weakness/Questions		
Summary Comments		

**Section 3: Financial Plan and Capacity**

**3.1 Planning and Budget Worksheet / 3.2 Budget Narrative**

**Characteristics of a Strong Response:**

- The budget worksheet (Attachment AA) contains reasonable assumptions and budget numbers that reflect all start-up expenses.
- The applicant identifies financial procedures, policies, systems and processes for accounting, payroll, and independent annual audits.
- Sound criteria and procedures are in place for selecting contractors for any administrative services.
- There is a high level of financial expertise amongst the applicant’s internal and external team members.
- The start-up and five-year operating budgets are complete, realistic and viable.
- The applicant’s budget narrative (Attachment BB) clearly explains and supports all revenue and cost assumptions.
- The applicant articulates a sound contingency plan to meet financial needs if anticipated revenues are lower than estimated.

**Initial Application Review**

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**Section Strengths**

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**Concerns / Questions**

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**Final Application Review**

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**Section Strengths**

Reference	Page

**Concerns / Questions**

Reference	Page

**Section 3: Financial Plan and Capacity**

**3.3 Network Financial Plan**

**Characteristics of a Strong Response:**

- The applicant provides a detailed description of the fiscal health of other schools in the network, including a comprehensive description of any schools on fiscal probation or in bankruptcy.
- The applicant provides a complete, realistic, and viable budget for the network (Attachment CC). The budget includes reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions, identification of the amounts and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated) and including evidence of firm commitments where applicable.
- The applicant articulates a sound contingency plan to meet financial needs if anticipated revenues are lower than estimated.

**Initial Application Review**

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**Section Strengths**

Reference	Page

**Concerns / Questions**

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**Final Application Review**

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**Section Strengths**

Reference	Page

**Concerns / Questions**

Reference	Page



# Summary Rating

## Section 3: Financial Plan and Capacity

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply copied from your subsection analysis.

Initial Application Review		
<input type="checkbox"/>	Meets or Exceeds Standard	<input type="checkbox"/>
<input type="checkbox"/>	Partially Meets Standard	<input type="checkbox"/>
<input type="checkbox"/>	Does Not Meet Standard	
Financial Plan and Capacity Strengths		
Summary Comments		
Financial Plan and Capacity Weakness/Questions		
Summary Comments		

Final Application Review		
<input type="checkbox"/>	Meets or Exceeds Standard	<input type="checkbox"/>
<input type="checkbox"/>	Partially Meets Standard	<input type="checkbox"/>
<input type="checkbox"/>	Does Not Meet Standard	
Financial Plan and Capacity Strengths		
Summary Comments		
Financial Plan and Capacity Weakness/Questions		
Summary Comments		

**Section 4: Portfolio Review & Performance Record**

**4.1 Portfolio Summary / 4.2 Performance Record: Academics**

**Characteristics of a Strong Response:**

- Applicant provides clear, compelling evidence of raising student achievement levels at each school in the network and evidence that the applicant’s schools are high performing and successful (Attachment EE and FF).
- Graduation rates are indicative of highly successful strategies (if applicable).
- The applicant selects one or more of the organization’s consistently high-performing schools and provides a detailed narrative outlining primary causation of high-quality, high-performing status, along with a description of challenges met and overcome.
- Applicant selects one or more of the organization’s low or unsatisfactorily performing schools and provides a detailed narrative outlining primary causation of low performing school(s) in the network and specific strategies outlined that corrected, or will correct, the deficiencies (if applicable).

**Initial Application Review**

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Section Strengths	
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Concerns / Questions	
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**Final Application Review**

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Section Strengths	
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Concerns / Questions	
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**Section 4: Portfolio Review & Performance Record**

**4.3 Performance Record: Operations / 4.4 Performance Record: Fiscal**

**Characteristics of a Strong Response:**

- If the school is operating under another authorizer, the school’s performance report or authorizer evaluation (Attachment GG, HH, II, and JJ) is favorable.
- The latest audit (Attachment LL) shows no findings and is prepared in accordance with generally accepted accounting and auditing principles as outlined in Tennessee law.
- The organization is in good standing wherever its schools are located, and there have been no revocations, litigation that has resulted in negative outcomes, non-renewals, or financial, organizational, or academic deficiencies (if applicable, Attachment KK).

**Initial Application Review**

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**Section Strengths**

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**Concerns / Questions**

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**Final Application Review**

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**Section Strengths**

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**Concerns / Questions**

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# Summary Rating

## Section 4: Portfolio Review & Performance Record

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply copied from your subsection analysis.

Initial Application Review		
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<input type="checkbox"/>	Does Not Meet Standard	
Portfolio Review & Performance Record Strengths		
Summary Comments		
Portfolio Review & Performance Record Weakness/Questions		
Summary Comments		

Final Application Review		
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Portfolio Review & Performance Record Strengths		
Summary Comments		
Portfolio Review & Performance Record Weakness/Questions		
Summary Comments		

