



## **Office of Charter Schools**

# **2022**

# **Charter School Application Supplement**

This Shelby County School's supplement is for applicants applying on the February 1, 2022 application deadline for the 2023-24 school year.

## Supplement Submission Guidelines

For the 2022 charter school application process, **any sponsor interested in opening a charter school in Shelby County must submit the Tennessee Department of Education’s 2022 Charter School Application (including the budget document) and is strongly encouraged to submit the Shelby County Schools 2022 Charter School Application Supplement.** The Shelby County Schools (SCS or “the District”) Supplement elaborates on key aspects of the state application for opening a successful school within Shelby County.

## Evaluation of the TDOE Application and SCS Supplement

The State Board of Education requires the Tennessee Department of Education (TDOE or “the Department”) to provide “scoring criteria addressing the elements of the charter school application,” SBE Rule 0520-14-01-.01(1)(a). **SCS will use the TDOE’s Charter School Application Evaluation Ratings and Sample Scoring Criteria (“charter school scoring rubric”) and the SCS Supplement to evaluate all application materials submitted by a sponsor.** The SCS Supplement requests additional information that informs the degree to which the sponsor’s proposal meets the TDOE application criteria, in compliance with SBE Rule 0520-14-01-.01(2)(a). The District’s decision to approve or deny an application will be based on the degree to which a sponsor’s application meets the state’s evaluation criteria.

Consistent with the requirements of TDOE’s scoring rubric, applications that do not meet or exceed the standard in all sections (academic plan, operations plan, financial plan, and, if applicable, past performance), as evidenced by the summary review ratings, will be deemed not ready for approval.

## SCS Supplement Format

The SCS Application Supplement contains seven sections that request narrative responses and and/or attachments as identified at the appropriate places. **All applicants are strongly encouraged to respond to Sections 1-6. Applicants may respond to Section 7 only if they are proposing to engage a Charter Management Organization (CMO).** The main response to the Application Supplement, excluding requested attachments, should be contained in one PDF document. This PDF document will be submitted to SCS in both hard copy and electronic versions as part of the sponsor’s complete charter school application submission. Attachments to the Supplement should be saved as separate files (labeled as indicated below) and submitted with attachments to the required TDOE application.

**Section 1:** Addressing Areas of Need

**Section 2:** Percentile Rank, Success Rate, and TVAAS

**Section 3:** Operational Scorecard

**Section 4:** Financial Scorecard

**Section 5:** Capacity Review

**Section 6:** Community Impact

**Section 7:** Third-Party Charter Management Organizations

## Section 1: Addressing Areas of Need

Please review the tables below which provide data released by the TDOE regarding student performance in Shelby County for the years 2017-2019 (*Note that Spring 2020 and Spring 2021 have been omitted due to COVID and the accountability rules*).

The District identifies both reading language arts (across all tested grade levels) and college and career readiness as immediate areas of need; however, improvement is needed in all content areas. Based on the grade structure of your proposed charter school, describe specifically how your education plan will assist the District in targeting areas of need. If the proposed school is a high school, list and explain your strategies for raising the ACT composite score of your students to a 21.

If your organization currently operates charter schools in Tennessee, submit each school's proficiency rate in the most recent academic year for each content area included in the table(s) below (applicable to the school's current grade structure). If one or more of your currently operating schools is a high school, list the ACT composite and graduation rate for the last three (3)<sup>1</sup> years.

### Shelby County Schools District-wide results from 2017, 2018 & 2019

On-Track + Mastered	Grade Band	2017	2018	2019
ELA	3-5	21.1%	24.6%	24.0%
ELA	6-8	19.5%	19.6%	18.5%
ELA	9-12	19.5%	15.9%	20.7%

On-Track + Mastered	Grade Band	2017	2018	2019
Math	3-5	26.1%	29.2%	34.1%
Math	6-8	16.4%	17.4%	22.2%
Math	9-12	7.6%	9.4%	12.7%

### Shelby County Schools ACT Scores

Year	ACT Composite	Graduation Rate
2019	17.5	79.3%
2018	17.8	79.2%

*Note: The applicant may use TNReady Spring 2021 scores as a resource for this section as well.*

<sup>1</sup> Operators with less than three years of ACT and/or graduation rate data are still eligible and may include as much data as are available.

## **Section 1. Evaluation Criteria**

Responses from Section 1 will inform SCS' analysis of the extent to which applicants meet the following criteria from the TDOE charter school scoring rubric:

- 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.
- Academic achievement goals are rigorous, measurable, and realistic and set high standards and high expectations for student learning.

## Section 2: Percentile Rank, Success Rate, and TVAAS

The District believes that a level 4 or 5 TVAAS score reflects performance that warrants consideration for opening. In this section, please explain the anticipated student performance baseline and describe specifically how your proposed academic program will help students achieve expected results. If you currently operate schools that have not attained a level 4 or 5, please explain to what, specifically, you attribute the lower performance, and provide a rationale – including other performance indicators – that demonstrates your readiness for growth.

**If your organization currently operates charter schools in Tennessee,** please complete the following:

- list the percentile rank, success rate, and TVAAS score for the last three (3) years for each school (*years: 2017, 2018, 2019*)
- list the expected annual percentile rank, success rate, and TVAAS scores for each of the school's past three years of operation (*if not already included in your response to Section 1.4 of the TDOE application, and inclusive of years 2017, 2018, 2019*).

### Section 2. Evaluation Criteria

Responses from Section 2 will inform SCS' analysis of the extent to which applicants meet the following criteria from the TDOE charter school scoring rubric:

- The academic plan is rigorous and research-based, addresses the needs of the targeted student population, and implements the school's academic focus.
- Academic goals support the mission and vision of the school.
- Academic achievement goals are rigorous, measurable, and realistic and set high standards and high expectations for student learning.
- Applicant provides clear, compelling evidence of raising student achievement levels at each school in the network and evidence that the operator's schools are high performing and successful.

## Section 3: Operational Scorecard

Please review the District's operational scorecard, included [HERE](#). In your response, please:

- A. Explain your organization's overall approach to ensuring it meets the District's operational performance standards set forth in the scorecard.
- B. Detail how the proposed school will satisfy the requirements of each indicator contained in the District's operational scorecard. Some elements of the scorecard are District-specific, and thus plans for satisfying requirements will not have been addressed in the TDOE application. Other elements may have been addressed, at least in part, by requirements in the TDOE application. If your plan for satisfying a specific requirement has already been addressed as part of your response to the standard TDOE application, you may cite the relevant response by section name and page number.
- C. ***If your organization currently operates charter schools authorized by SCS***, please submit your most recent scorecard and account for any indicators that received a score below a 3 or "did not meet."

### Section 3. Evaluation Criteria

Responses from Section 3 will inform SCS' analysis of the extent to which applicants meet the following criteria from the TDOE charter school scoring rubric:

- *The proposed board structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and financial.*
- *A plan to ensure compliance with applicable state and federal regulations.*
- *The applicant provides a compelling data management plan that protects the privacy of student information.*
- *The applicant identifies financial procedures, policies, systems and processes for accounting, payroll, and independent annual audits.*
- *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.*

## Section 4: Financial Scorecard

Please review the District's financial scorecard, included [HERE](#) of this Supplement. In response, please:

- A. Explain your organization's overall approach to ensuring it meets the District's financial performance standards set forth in the scorecard.
- B. **If your organization currently operates charter schools authorized by SCS**, please submit your most recent scorecard and account for any indicators that received a score of 1, 2, or "no."
- C. **If your organization currently operates a school or network of schools**, please submit your most recent audited financials, and any additional financial performance indicators as received by a previous district.

### Section 4. Evaluation Criteria

Responses from Section 6 will inform SCS' analysis of the extent to which applicants meet the following criteria from the TDOE charter school scoring rubric:

- *Proposed structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and financials.*
- *A plan to ensure compliance with applicable state and federal regulations.*
- *The applicant identifies financial procedures, policies, systems and processes for accounting, payroll, and independent annual audit.*
- *There is a high level of financial expertise amongst the applicant's internal and external team members.*
- *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 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.*

## Section 5: Capacity Review

*Capacity* means the ability to execute the proposed plan effectively and, ultimately, to establish and operate a high-quality public charter school. Shelby County Schools will examine the capacity of the sponsor, organization, and school leadership to determine if the proposed charter school can competently and effectively deliver top results in both academics and operations. To assess a sponsor's capacity, SCS considers the group's individual and collective qualifications and experiences, members' alignment to the proposed school mission and vision, and individuals' commitment to supporting the school's start-up and ongoing operation. A strong school design is necessary but not sufficient for approval; a sponsor must inspire confidence in its ability to implement the proposed program successfully.

- A. If your organization is currently operating charter schools,** Question 4.1(b) of the TDOE application requires existing operators to, "Provide detailed student achievement and growth results for each school in the network, including grade levels tested on state assessments, as **Attachment Q.**" Please provide the information in this section as well.
- B. If your organization does not currently operate schools,** present any evidence of successful contributions to education and/or community engagement to improve the lives of children for which the sponsoring organization and/or leadership team members have been responsible.
- C. If you're organization is currently operating charter schools,** discuss your experience with your current school's model, and if there is a change to the model, any capacity shifts that may occur and the reasoning. A school model may be defined as a school's focus (i.e. STEM, Business) or a turnaround model. *Turnaround* may be defined as a school or operator that provided intervention to a low-performing school to make gains in achievement. Examples of turnaround in the Tennessee area are schools within the Achievement School District.
- D. If your organization does not currently operate schools,** present evidence of research and/or execution of the model that is being proposed to support students within Shelby County.
- E.** Identify the proposed school founder/executive director/school leader and explain why this individual is well qualified to lead the proposed school in achieving its mission. Describe the proposed leader's academic and/or organizational leadership record, as applicable.

Provide specific evidence that demonstrates the school leader's capacity to design, launch, and manage a high-performing charter school, including the following (if not already provided as part of **Attachment H** of the TDOE application):

- Achievement data as determined by the state for each school year and each subject area, including the percent of students testing proficient and advanced for all years and subject areas (provide for the most recent three years of teaching or school leadership).
- Growth measurements as determined by the state for each school year and each subject area (provide for the most recent three years of teaching or school leadership).
- Any gap closure data, if provided by the state.



***If the proposed leader has never run a school***, describe any leadership training programs that (s)he has completed or is currently participating in.

***If the proposed leader has not yet been identified***, discuss the qualifications, skills, and experience that will be most important for the person in this position to have in order for the school to be successful. Describe the methods to be used for recruiting qualified candidates. Explain the recruitment and selection timeline and process.

- F.** Describe the responsibilities and qualifications of the school's leadership/management team beyond the principal/head of school. If known, identify the individuals who will fill these positions and provide, as **Attachment S1** of the Supplement, the qualifications, resumes, and professional biographies for these individuals (if not already provided as part of **Attachment G/H** of the TDOE application).
- G.** The TDOE application asks for documentation of any pledged community support and/or established partnerships (Section 1.12/**Attachment E**). Please identify any community partnerships or engagements that have been established informally, or that you intend to establish, and describe how those partnerships will support the school's success.
- H.** 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.
- I.** Explain who will be primarily responsible for development of the school from approval to opening, and what the expected time commitment for these people will be.
- J.** Describe the applicant team's individual and collective qualifications for implementing the operations plan successfully, including capacity in areas such as:
  - o Staffing;
  - o Professional development;
  - o Performance management;
  - o General operations; and
  - o Facilities management.
- K.** Describe the organization's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, or facility transition plans, as applicable.

## **Section 5. Evaluation Criteria**

Responses from Section 4 will inform SCS' analysis of the extent to which applicants meet the following criteria from the TDOE charter school scoring rubric:

- *The proposed board structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and financial.*
- *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 a detailed and realistic timeline for starting the school that aligns with the start-up budget.*
- *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.*
- *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.*

## Section 6: Community Impact<sup>2</sup>

Please review **the Education Priorities Document/Rubric (EPDR)**, as cited in SCS Board Policy 1011, and found [HERE](#), which provides summaries of *enrollment growth*, *enrollment capacity*, and *school performance* by region. Look at the document found [HERE](#) for the *real estate inventory* and process. In response:

- A. **Student Data:** Explain how data regarding *enrollment growth*, *enrollment capacity*, and *school performance* in the community in which you intend to open your school inform your plans.

Based on the outreach, research, and understanding of the students and the community, briefly identify the most critical unmet needs and challenges to the success of the anticipated student populations. Explain how data, including data presented in your proposal and in SCS's EPDR demonstrates the identified unmet needs and challenges. Additionally, describe how the proposed school intends to address these challenges and unmet needs for the target student population.

In the response, address:

- a. What will the proposed school offer that is not currently available in existing school options and in the Memphis educational landscape?
- b. How will the proposed school address the needs of the community and build upon community assets? Why is the proposed school a good fit to address the identified needs for the targeted student population and community?
- c. Based on your outreach, research, and understanding of the community, assess the impact the proposed new school would have on the students and communit(ies) it seeks to serve, if approved to open.
- d. The anticipated impact of the school on students, families, community residents, and community institutions. If the proposed school anticipates that most students will leave existing community/neighborhood schools to enroll in the proposed school, assess the likely impact on neighborhood schools (utilize the EPDR as a resource).

Additionally, please discuss any questions or concerns raised by community members and stakeholders related to what the proposed new school will mean for students, community members, and community institutions, and the data and information (both quantitative and qualitative) that informed your assessment.

- B. **Advancing Equity:** Define and describe the role of equity in the proposal development process and the proposed new school model. How does this proposal advance equity for students and communities?
- C. **If you intend to seek use of a District facility**, please:
- a. Articulate how the available facility aligns with your anticipated needs;
  - b. Explain the status of conversations with the District regarding the terms of its availability;
  - c. Discuss your assessment of the building's readiness, including any anticipated up-front improvements and renovations, and plans for covering these costs.

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<sup>2</sup> Some items in this section have been adapted from the Chicago Public Schools 2021 RFP.

**NOTE:** *Shelby County Schools will meet its obligation to make facilities available to charter operators. Charter schools are responsible for all investments and expenses related to the building's operation, and the use of District facilities is subject to the District and the school agreeing on operating terms.*

### **Section 6. Evaluation Criteria**

Responses from Section 5 will inform SCS' analysis of the extent to which applicants meet the following criteria from the TDOE charter school scoring rubric:

- *Facility plans provide sufficient space for the educational program and anticipated student population and reasonably align with the budget.*
- *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 locate.*
- *The applicant outlines a sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for, a facility.*

## Section 7: Third-Party Charter Management Organizations

*This section is requested of any applicant intending to contract with a Charter Management Organization (CMO) and is meant to supplement questions found in Section 2.10 of the TDOE application. A CMO is any nonprofit third-party entity that provides comprehensive education management services to a school via contract with the school's governing board. Applicants need not provide any information already provided as part of the primary application.*

### A. Third-party CMO Selection

1. Explain how and why the CMO was selected, including when and how the applicant learned of the CMO, which other CMOs were considered, why the CMO was selected over other CMOs, and what due diligence was conducted.

### B. Third-party CMO Track Record

1. Explain the CMO's success in serving student populations like 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 CMO), identifying each reference.
2. List all schools operated by the CMO. For schools that serve the same grade levels *and* student populations demographically similar to the anticipated population of the proposed school, include the name, year opened, board contact information, location, number of students, and identify the authorizer. If the CMO operates more than 10 schools fitting the criteria, list the 10 schools you consider to be most comparable to the proposed school.
3. Provide evidence of the financial health of the CMO. Include as **Attachment S2** the most recent independent financial audit report of the CMO 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 CMO has experienced in the past five (5) years.

### C. Legal Relationships and Disclosures

1. Provide evidence that the board is independent from the CMO 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 CMO, and any affiliated business entities.
3. List all subsidiaries or related entities that are affiliated, or owned in whole or in part, by the CMO 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 CMO (if any), including which school employees the CMO will supervise, how the CMO will supervise these employees, and how the charter school board will oversee the CMO's supervisory responsibilities.

6. If the school's governing board intends to execute promissory notes or other negotiable instruments, or enter a lease, lease-purchase agreement, or any other facility or financing relationships with the CMO or its affiliates, 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 CMO and the school, including an explanation of how any such loans, grants, or investments may be initiated, repaid, and refused by the school.

#### **D. Organizational Structure**

1. Provide a detailed description of the roles and responsibilities of the CMO.
2. Describe the scope of services and costs of all resources to be provided by the CMO.
3. Describe the oversight and evaluation methods that the board will use to oversee the CMO.
4. Describe the compensation structure and payment schedule, including clear identification of all fees, bonuses, and any other compensation to be paid to the CMO.
5. Describe the respective financial responsibilities of the school governing board and the CMO. 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?

#### **Section 7. Evaluation Criteria**

Responses from Section 6 will inform SCS' analysis of the extent to which applicants meet the following criteria from the TDOE charter school scoring rubric:

- *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.*
- *The CMO agreement (**Attachment K**) 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.*