

2009 CHARTER SCHOOL APPLICATION FINAL EVALUATION

School Name: South Valley Preparatory School

I. TABLE OF CONTENTS – Not to be evaluated

II. COVER SHEET/ABSTRACT – Not to be evaluated

III. STATEMENT OF ASSURANCES – Not to be evaluated

Throughout the evaluation, each of the five (5) remaining sections is rated as *Inadequate*, *Approaches*, *Meets*, or *Exceeds*:

The following criteria guided the evaluation of the quality of the responses in each evaluated section of the application:

Inadequate	Approaches	Meets	Exceeds
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **Inadequate:** The section lacks significant detail, demonstrates lack of preparation, or otherwise raises substantial concerns about the applicant’s understanding of the issue in concept and/or ability to meet the requirement in practice.

- **Approaches:** The section addresses some of the criteria, but lacks meaningful detail and requires important additional information in order to be reasonably comprehensive.

- **Meets:** The section indicates solid preparation and grasp of key issues that would be considered reasonably comprehensive. It contains many of the characteristics of a response that exceeds even though it may require additional specificity, support or elaboration in places.

- **Exceeds:** The section reflects a thorough understanding of key issues and indicates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

IV. CHARTER SCHOOL MISSION AND STATEMENT OF NEED

The Charter School Mission Statement should communicate the essence of the school to stakeholders and to the public and should provide the focal point to which all other sections of the school’s plans align. In addition, the proposed charter school and its mission must be in the best interest of the students and community that it proposes to serve.

A Charter School Mission and Statement of Need section will be complete if it has addressed the following components:

- A **Mission Statement** that is clear and compelling and includes the following components:
 - Who the school seeks to serve;
 - What the school seeks to accomplish;
 - What methods the school will use.

- An explanation of **how the school will know if it is achieving its mission** that includes school level or organizational goals that are:
 - Measurable
 - Directly support the Mission Statement.

(NOTE: Specific measurable student performance expectations [student goals] should be addressed in section IV, Educational Plan.)

- An **explanation of need** that describes how the proposed charter school is in the best interest of the students and community that it proposes to serve. This will include a demographic description of the student and community population within which the school will be located.

ANALYSIS: CHARTER SCHOOL MISSION AND STATEMENT OF NEED

Criteria Satisfied	Reference
<p>Mission Statement</p> <p>The mission of South Valley Preparatory School is to provide a small, safe learning community so that students in the South Valley can engage in a rigorous and relevant academic curriculum. Within a family framework, individual student’s strengths can be cultivated while expanding academic horizons and fostering active citizenship.</p> <p>The mission statement section includes the required components.</p>	<p>p. 10</p>

<p>Achievement of Mission/Goals</p> <p>The applicants propose two-fold accomplishments to demonstrate achievement of the mission: 1) Academic focus (assessed academically); 2) Student development as a community member that makes a positive impact upon the South Valley (community engagement through Family Advisory and Service Learning). The mission statement is supported.</p>	<p>p. 10</p>
<p>Explanation of Need</p> <p>South Valley Preparatory School seeks to serve South Valley students; non-immigrant and traditional immigrant Hispanic students and to establish a safe, small middle school.</p> <p>The applicant provided several reasons for the establishment of a charter middle school in the South Valley. Included are: underperformance of Hispanic students in the areas of reading and math; low social economic status of 90% of students attending South Valley middle schools; increased exposure to gang activity; substance abuse; and lack of resources at home to support learning opportunities. Others are large class sizes in the traditional middle schools; lack of resources; limited or nonexistent service learning opportunities; and nonexistence of research based programs to address the academic achievement gap.</p> <p>Establishment of need is found throughout the document. A table of comparative standards-based assessment data of traditional middle schools and academy schools was provided on page 19.</p> <p>South Valley Preparatory School intends to replicate the Kit Carson Middle School Academy Model that was developed over a 7-year period as part of Albuquerque Public Schools Kit Carson Elementary School (preK-8) and recently closed by the district.</p>	<p>pp. 18 & 19</p> <p>pp. 10-14</p> <p>p. 19</p> <p>p. 13</p>

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>Mission Statement</p> <p>No concerns noted.</p>	
<p>Achievement of Mission/Goals</p> <p>The “two fold accomplishments of the mission as stated, do not meet the criteria of SMART goals in that they lack specificity, measurability and target dates.</p>	<p>p. 10, second paragraph</p>

<p>Explanation of Need</p> <p>The application narrative discusses the difference between non-immigrant and traditional immigrant Hispanic students; however, the difference in instructional requirements for the two identified student groups, if any, is unclear.</p> <p>On Pages 11, 13, and 15 the application makes a distinction made between non-immigrant Hispanic and immigrant Hispanic students. On page 15, the application states “As latent bilinguals, non-immigrant Hispanic students and immigrant Hispanic student benefit most in a system where oral communication is valued as a natural and important formal learning opportunity.” It is not clear how South Valley Preparatory School intends to meet the language needs of each of these two distinct types of learners.</p>	<p>pp. 11, 13, 15, 17</p> <p><i>During the applicant interview of 8/5/09, it was clarified that ESL strategies are best practices for both groups of students. On 8/25/09 the applicants submitted a written response providing additional clarification in regard to meeting the English language proficiency needs of both the non-Hispanic immigrant and immigrant Hispanic students.</i></p>
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CHARTER SCHOOL MISSION AND STATEMENT OF NEED SUMMARY

Inadequate	Approaches	Meets	Exceeds
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ANALYSIS: CHARTER SCHOOL MISSION AND STATEMENT OF NEED

<p>Strengths</p> <p>The applicants presented a clear mission statement that meets the required criteria.</p> <p>The applicants addressed needs based on the failures of the local middle schools, particularly with Hispanic students in the areas of reading and math, and challenging local demographics including poverty, gang activity, and substance abuse. They offer a solution in a proposed replication of the Albuquerque Public Schools Kit Carson Middle School Academy Model developed over a 7-year period. The Kit Carson Model demonstrated success with students of the community that South Valley Preparatory School wishes to serve, and its success was supported by comparative AYP results (which are later presented in the Educational Plan section on page 19 of the application). The applicants are educators who are experienced with the Kit Carson Middle School Academy Model.</p>
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<p>Concerns and Additional Questions</p> <p>No Concerns noted</p>
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V. EDUCATIONAL PLAN

The educational plan should describe who the school expects to serve; what the students will achieve; how they will achieve it; and how the school will evaluate performance. It should provide a clear picture of what a student who attends the school will experience in terms of educational climate, structure, materials, schedule, assessment and outcomes.

A. CURRICULUM FRAMEWORK

The New Mexico Content Standards, Benchmarks and Performance Standards provide the content requirements and expectations for students in all public schools. The description of the curriculum should provide a sense not only of what the school will teach but also of how and why. (*NOTE: Refer to the Glossary of Terms Used in the Application, last two pages of this document, to assist in the evaluation of this section.*)

A description of the Curriculum Framework will be complete if it has addressed the following components:

1. Philosophy and Approach to Instruction:

- A description of the educational philosophy and curricular approach of the proposed school.
- A description of why the particular educational philosophy and/or approach was selected.
- Documentation, research, and/or a rationale that supports the educational philosophy and curricular approach.
- An explanation of why the educational philosophy and/or approach is/are likely to result in improved educational performance of students.
- A description of how the educational philosophy and/or approach aligns with the school's mission and student needs.

2. Description of the Curriculum

- **If the curriculum has already been selected/developed:** A detailed description of the curriculum that includes a scope and sequence.
- **If the curriculum has yet to be developed:** A description of the proposed curriculum and a specific plan for its development that will include a scope and sequence. The development plan should include a description of the process, a timeline, and resources (including staffing) to be utilized.

3. Alignment with NM Standards

- A copy of the alignment document if it was completed, **OR**

- If the alignment has not been completed, a description of the process and a specific timeline to be used for aligning the curriculum with the New Mexico Standards.

4. Strategies and Methods:

- A description of the strategies and methods to be used in delivering the curriculum.
- An explanation of how the curriculum will address students’ needs and assist students in reaching the NM Standards. *(NOTE: Students with special needs, including students who require bilingual education, special education or are limited English proficient, should be addressed in Subsection D: Special Populations)*
- A descriptive example of the curricular strategies and methods in action in the classroom.
- A description of professional development that may be necessary for implementation of the strategies and methods to be used in delivering the curriculum.

ANALYSIS: CURRICULUM FRAMEWORK

Criteria Satisfied	Reference
<p>Philosophy and Approach to Instruction</p> <p>The South Valley Preparatory School’s philosophy is “all students can learn” and that through a small, nurturing and safe learning community, students can develop greater capacity to reach proficiency in reading, math, social studies and science. (P. 15) In addition, a student’s sense of belonging is noted as central to the philosophy.” (p. 20)</p> <p>The applicants build and support South Valley Preparatory School’s philosophy and approach to instruction through citations from research, articles, and reports. In addition, data from 2007-2008 NMSBA results for the Kit Carson Middle School Academy demonstrate significantly higher performance of 8th grade Hispanics proficient in math and reading when compared to traditional middle schools and other small learning community middle schools in South Valley. <i>(Note, the applicants intend to replicate the Kit Carson Middle School Academy Model)</i></p> <p>A 6-step Reading Placement Framework is presented, the strategy of which will be used in all content areas. Steps include student assessment, placement in a homogeneous reading group, 8 weeks of direct instruction, reassessment, regrouping based on assessment results, and rotation of each reading group through the core team of teachers.</p> <p>Also noted is that the applicants intend to implement higher level conversational strategies through curriculum integration where topics and ideas a represented across core content areas.</p>	<p>pp. 15 and 20</p> <p>p. 19</p> <p>p. 22</p> <p>p. 22 bottom and p. 23 top</p>

<p>Description of the Curriculum</p> <p>Classes will be provided in the five core areas of reading, math, social studies, language arts and science on a daily basis. A team of four teachers in the core academic subjects over a period of three years will provide the instruction (looping model).</p> <p>The following programs are proposed for instruction: Math - Connected Mathematics Program 2; Science – Science Explorer by Prentice Hall; Social Studies – Series by Prentice Hall and History of New Mexico; Reading - Balanced Literacy using the Success for All instructional framework.</p> <p>The curriculum for Art, Health and Service Learning is to be completed “as the year progresses”. (P. 27) A general plan and timeline for development of the Health Curriculum (6th grade) is included on p. 32.</p> <p>A scope and sequence is provided for core subject areas.</p> <p>The application states that integration of curriculum content at South Valley Preparatory School is most visible in and demonstrated through the area of fine arts.</p>	<p>p. 17</p> <p>p. 27</p> <p>pp. 27 and 32</p> <p>p. 25</p>
<p>Alignment with NM Standards</p> <p>Alignment documents are provided for the Math, Science, Social Studies and Language Arts. Partial documents are provided for Fine Arts, Health, Service Learning and PE.</p>	<p>pp. 46-68</p>
<p>Strategies and Methods</p> <p>South Valley Preparatory identifies the following methods to be incorporated into all core-content areas: anticipatory set; small group instruction; critical thinking practices; reading skill practices in content areas; writing skill practices throughout; modeling of Think-Aloud; scaffolding of lessons; integrated technology; authentic instruction and assessment based on the NM content standards; Restate, Answer, Calculate/Cite, Explain, and Demonstrate (RACED) format to answer questions; service learning; and mathematical skills practice.</p> <p>Professional development is addressed and recognizes both school-wide needs based on the educational plan as well as individual needs based on teachers’ skills in various areas.</p>	<p>p. 69</p> <p>p. 70</p>

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>Philosophy and Approach to Instruction</p> <p>The application provides information on a small safe learning community, looping, strategies and assessments, as well as a philosophy that includes “All children can learn”; developing native and second languages, reading across the curriculum, authentic personal relationships, and service learning. The school’s curricular focus or approach may need more clarification. Pp. 15 & 16</p> <p>What is the research based instruction in reading?</p>	<p><i>The applicants responded in writing on 8/11/09 as follows: South Valley Prep uses a multidisciplinary approach to curriculum. The teachers integrate particular content, when appropriate, into other core classes so that individual subjects are less fragmented for students.</i></p> <p>P. 25 <i>During the interview on 8/5/09, the applicants clarified that the research-based reading program is a modification of the Success for All program.</i></p>
<p>Description of the Curriculum</p> <p>A specific plan for the development of the Fine Arts, Health, Service Learning and P.E. curricula does not include a description of the process, a timeline, and resources (including staffing to be utilized). Health does, however, provide a general timeline for its development.</p>	<p>p. 32 <i>On 8/25/09, the applicants provided a written response that clarified plans for development of the Fine Arts, Health, Service Learning and P.E. curricula.</i></p>
<p>Alignment with NM Standards</p> <p>No concerns noted.</p>	
<p>Strategies and Methods</p> <p>No concerns noted.</p>	

B. EDUCATIONAL PROGRAM

The educational program should support the school’s educational plan. A description of the educational program will be complete if it has addressed the following components:

1. Length of School Day and School Year:

- The proposed length of the school day, including the number of instructional hours;
- The proposed length of the school year, including number of days and total number of instructional hours;
- A description of how the proposed length of the school day and school year support the Educational Plan.

2. Grade Levels, Class Size and Projected Enrollment:

- The grade levels the charter school proposes to serve;
- If a phase-in of grade levels is proposed, a plan for the phase in by year and grade levels and a rationale for the phase-in plan;
- The total projected student enrollment (maximum enrollment for the school).
- Projected class size.

3. Graduation Requirements (if applicable):

- The school’s proposed credits and requirements for graduation.
- A description of how any proposed requirements that differ from the New Mexico Graduation Requirements [22-13-1.1.] support the school’s educational plan.

ANALYSIS: EDUCATIONAL PROGRAM

Criteria Satisfied	Reference
<p>Length of School Day and School Year</p> <p>Length of school day is 7 instructional hours (total 8 hours on campus). The length of the proposed school year is 182 instructional days.</p> <p>A detailed description of the proposed weekly schedule is provided and includes a 90-minute block five days a week for reading and 75-minute blocks for other core content classes. A detailed schedule is provided that demonstrates how the Educational Plan is supported by the length of the school day.</p>	<p>p. 71</p>
<p>Grade Levels, Class Size and Projected Enrollment</p> <p>South Valley Preparatory School presents a five year phase-in plan designed to maintain integrity and continuity of the foundational philosophy of the school. Year 1 will begin with a Core Team I for grades 6-8 with 78 students. Year 2 will begin the phase in of a Core Team II at the 6th grade level, increasing the enrollment for year two to 104 students. Core Team II will continue to be mentored by Core Team I as grades are phased in through year 4. By year 5, the total projected student enrollment will be 156 students. The pupil-teacher ratio will be maintained at 26:1 throughout the phase-in.</p>	<p>p. 73</p>

Graduation Requirements (if applicable)	
N/A	

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>Length of School Day and School Year</p> <p>The total number of instructional hours for the year is not stated. The schedule indicates an early release for students every fourth Friday for teacher professional development, which needs to be factored into the total.</p>	<p>p. 72 <i>The applicants submitted a written response on 8/25/09 indicating a total of 1,219 instructional hours, including the early release every fourth Friday.</i></p>
<p>Grade Levels, Class Size and Projected Enrollment</p> <p>No concerns noted.</p>	
<p>Graduation Requirements (if applicable)</p> <p>N/A</p>	

C. STUDENT PERFORMANCE EXPECTATIONS

Student academic performance is central to a school’s existence. Student performance expectations must be aligned with the mission and the educational plan.

The Student Performance Expectations subsection will be complete if it has provided the following:

- Student-centered goals that are SMART:
 - **S**pecific;
 - **M**easurable;
 - **A**mbitious and **A**ttainable
 - **R**eflective of the school’s mission;
 - **T**ime-Specific with Target Dates

- Student-centered goals that are aligned with the school’s mission and the educational plan

ANALYSIS: STUDENT PERFORMANCE EXPECTATIONS

Criteria Satisfied	Reference
<p>Student-centered SMART Goals</p> <p>SMART Goals are presented for Reading, Writing (Language Arts), Science, Math, Social Studies, and Art. Measurement for growth in Reading, Writing, Science and Math will be based on the NMSBA. Measurement for proficiency in Social Studies will be based on pre/post Short-Cycle Assessment data. The goal for Art will be measured using teacher-created rubrics aligned with National Standards.</p>	<p>p. 74</p>
<p>Alignment</p> <p>Goals are aligned with the school’s mission and the educational plan presented.</p>	

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>Student-centered SMART Goals</p> <p>The applicant does not specify the short cycle assessments to be used to assess progress for the area of Social Studies.</p>	<p>p. 74 <i>During the interview of 8/5/09, the applicants clarified that the Social Studies short-cycle assessment would be based on Prentice Hall assessment questions.</i></p>
<p>Alignment</p> <p>No concerns noted.</p>	

D. PLAN FOR EVALUATING STUDENT PERFORMANCE

A Plan for Evaluating Student Performance will be complete if it addresses the following components:

- the types of assessments that will be used to measure student progress toward achievement of the NM Standards and the school’s student performance expectations;
- the timeline for achievement of the NM Standards and/or the school’s student performance expectations;

- the procedures for taking corrective action in the event that student performance falls below the NM Standards and/or the school’s student performance expectations;
- remediation for students not achieving standards, including a timeline for implementation of the remediation plan;
- assessments that might be considered in addition to the statewide-mandated testing;
- documentation and reporting of student data to students and parents.

ANALYSIS: PLAN FOR EVALUATING STUDENT PERFORMANCE

Criteria Satisfied	Reference
<p>Types of Assessments</p> <p>A plan is provided in the form of a table outlining types of assessments, frequency of administration, proficiency measures, remediation and reporting results. Areas addressed include Reading, Social Studies, Mathematics, Language Arts, Science and Art. Health and PE assessments are to be developed in the first year. Types of assessments include both formative and summative with frequency of administration noted as 2 to 3 times/week, every 9 weeks, and end of year depending on the assessment.</p>	<p>pp. 75-80</p>
<p>Timeline for Achievement</p> <p>The timeline for achievement based on SMART Goals and NMSBA is annually. Other summative timelines schedule test administration every 9 weeks (grading period), end of Units, and 3 times per year.</p>	<p>pp. 75-80</p>
<p>Corrective Action</p>	
<p>Remediation</p> <p>The applicant listed the following: homogenous grouping, differentiation, family advisory, academic improvement plan, student academic team referral, Success Maker, and Tier 2 Interventions as remediation in the table presented on Pp. 75-80.</p> <p>The Student Assistance Team (SAT) process is outlined under the special populations section of the application and includes basic timelines.</p>	<p>pp. 75-80</p> <p>p. 81</p>
<p>Additional Assessment</p> <p>Additional assessments are identified for Reading, Social Studies, Mathematics, Language Arts, Science and Art. Formative assessments include: teacher-created tests and rubrics, end-of-unit tests, RACED rubric, etc.</p>	<p>pp. 75-80</p>

<p>Documentation and Reporting</p> <p>Formats for documentation and reporting of student data include: Mid-term progress reports, 9-week progress reports, classroom and personal graphs, classroom and personal scattergrams, and formal NMSBA parent reports.</p>	<p>pp. 75-80</p>
<p>Criteria Not Sufficiently Addressed, Concerns & Additional Questions</p>	<p>Reference</p>
<p>Types of Assessments</p> <p>Specific short cycle assessments for core content areas are not yet identified.</p>	<p>pp. 75 – 79</p> <p><i>The applicants submitted a written response on 8/25/09 to clarify selection of short cycle assessments for Reading, Math, Science and Social Studies.</i></p>
<p>Timeline for Achievement</p> <p>It is unclear why the goal for reading is written to reflect a period of three years, while the other core content area goals are written to reflect one year.</p>	<p>p. 74</p> <p><i>The applicants responded in writing on 8/11/09 and clarified that the reason the other core content area goals are written to reflect only one year is because SV Prep may be using a different short-cycle assessment for those core areas and would like to establish accurate baseline data. Once accurate baseline data is collected in these other core areas then they would be able to create appropriate goals for a three-year span.</i></p>
<p>Corrective Action</p> <p>Corrective action that identifies procedures in the event that student performance falls below the NM Standards and/or the school’s student performance expectations is not specifically addressed.</p>	<p><i>The applicants submitted a written response on 8/25/09 to address a corrective action process for students whose performance falls below the NM Standards.</i></p>
<p>Remediation</p> <p>The timeline for implementation of the remediation plan for students not achieving standards is not clearly addressed.</p>	<p>pp. 75-80</p> <p><i>The applicants submitted a written response on 8/25/09 to</i></p>

	<i>clarify the timeline for remediation.</i>
Additional Assessment No concerns noted.	
Documentation and Reporting Parents will receive end-of-year reports on NMSBA; however it is unclear if and when parents are informed of student progress based on other assessments.	pp. 75-80 <i>The applicants submitted a written response on 8/25/09 to clarify additional reporting of student progress to parents (based on other assessments).</i>

E. SPECIAL POPULATIONS

A Special Populations subsection will be complete if it has addressed the following components:

- Suggested modifications to the proposed educational program to meet individual student needs, such as bilingual, limited English proficient, and special education;
- An outline of a special education plan (*the final plan of which must be completed and submitted to the charter authorizer by the end of the planning year*) that demonstrates understanding of state and federal special education requirements including the fundamental obligation to provide a free, appropriate education to students identified with disabilities;
- How the charter school will provide access to ancillary services including, but not limited to, counseling and health.

ANALYSIS: SPECIAL POPULATIONS

Criteria Satisfied	Reference
<p>Modifications to meet Individual Student Needs</p> <p>The application addresses the identification process for review by the Student Assistance Team and implementation of the three-tiered approach outlined in the NMPED Student Assistance Team Manual. Classroom-based interventions, special education referral and IEP development are addressed as part of the process.</p> <p>The 504 process is addressed.</p> <p>The applicant will use a Home Language Survey to identify students whose Primary Home Language is Other Than English (PHLOTE) and will administer the New Mexico English Language Proficiency Assessment (NMELPA).</p> <p>The applicant proposes to use the Sheltered Instruction Observation Protocol (SIOP) model to support English Language Learners (ELL) and provided an overview.</p>	<p>p. 81</p> <p>p. 83</p> <p>p. 84-85</p> <p>pp. 85-87</p>
<p>Special Education Plan</p> <p>The applicant proposes to use the PED Student Assistance Team Manual as guidance for providing student support, including the three-tiered approach.</p> <p>A basic outline of the Special Education Plan moving from least restrictive to most restrictive environments is presented.</p>	<p>p. 81</p> <p>pp. 81-82</p>
<p>Access to Ancillary Services</p> <p>South Valley Preparatory School will contract with licensed providers to provide ancillary services as needed to eligible students.</p> <p>Although types of ancillary services are not identified in this section, in the budget provided on page 90, \$4,000 is set aside annually for ancillary services such as diagnosticians, occupational therapists, social workers, and speech therapists for services provided prior to the 40th day.</p>	<p>p. 83</p> <p>pp. 90 and p. 83</p>

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>Modifications to meet Individual Student Needs</p> <p>Clarification needed in regard to the following statement on page 84: “This survey...for identifying English language learner (ELL) students in private schools.”</p> <p>The identification process for an ELL student is unclear. P. 84</p>	<p>P. 84</p> <p><i>During the applicant interview on 8/5/09, the applicants clarified that these two statements were “errors in wording”; the correct process for identifying ELL students was clearly stated during the interview.</i></p>
<p>Special Education Plan</p> <p>No concerns noted.</p>	
<p>Access to Ancillary Services</p> <p>No concerns noted.</p>	

EDUCATIONAL PLAN SUMMARY

Inadequate	Approaches	Meets	Exceeds
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ANALYSIS: EDUCATIONAL PLAN SUMMARY

Strengths
<p>The philosophy and approach are well supported by research, articles and studies. Most components of the educational plan, including strategies and methods to be used, scope and sequence for core subject areas, and student performance expectations (SMART Goals) are substantially described. A clear phase-in plan is presented, beginning with a Core Team I for grades 6-8 with 78 students in year one and following in year two with a Core Team II beginning at the 6th grade level and increasing to grade 8 by year four. Core Team I will mentor Core Team II to maintain integrity and continuity of the foundational philosophy of the school.</p> <p>Data from comparative AYP results for 2007-2008 demonstrate the success of the former Kit Carson Middle School Academy Model which the applicants propose to replicate. In addition, the applicants have prior experience with the Academy Model which may serve to increase the probability of success for the proposed South Valley Preparatory Academy.</p> <p>Overall, the proposed Educational Plan reflects substantial knowledge about the necessary components of the application and the requirements of law.</p>

Concerns and Additional Questions

Although some concerns were identified during the applicant interview and in the preliminary analysis, the applicants satisfactorily clarified those concerns through oral responses (8/5/09) and written responses (8/11/09 and 8/25/09).

VI. FINANCIAL PLAN

The Financial Plan should provide a description of how the school leadership intends to manage the school's finances, including assurances that public funds will be used appropriately and in compliance with all applicable federal and state requirements and laws. It should present a clear picture of the school's financial viability including the soundness of revenue projections; expenditure requirements; and how well the school's budget aligns with and supports implementation of the mission and educational plan.

A. BUDGET

A Budget subsection will be complete if it has addressed the following components:

- A completed revenue projection form 910B5 (included in the application appendices).
- A balanced proposed operating budget covering each year of the charter term based on current unit value using the Budget Spreadsheet (included in the application appendices).
- A detailed narrative description of the revenue and expenditure assumptions on which the operating budget is based. The budget narrative should provide sufficient information to fully understand how budgetary figures were determined. The following should be addressed:
 - major start-up expenses, including staffing and benefits; special education services; facility costs; materials and services; and contracted services; and
 - spending priorities that align with the school's mission, educational program, management structure, professional development needs, and growth plan.
- A detailed narrative description of all revenue sources other than SEG funding, to include any federal, state, or private funds and/or grants.
- A detailed narrative description of the expenditure assumptions for these other revenue sources.

ANALYSIS: BUDGET

Criteria Satisfied	Reference
Revenue Projection Form 910B5	
A completed Revenue Projection Form 910B5 is included as Appendix B for the first year of operation and is based on anticipated enrollment	p. 161 (Appendix B)

<p>of 78 students. A total of \$550,338.82 is anticipated for SEG.</p> <p>The Form 910B5 uses the correct T&E index of 1.087 for revenue projection.</p>	
<p>Operating Budget</p> <p>The applicant provided a proposed operating budget for each year over a term of five years using the Budget Spreadsheet. Appendix C</p>	<p>pp. 162-171 (Appendix C)</p>
<p>Revenue and Expenditure Assumptions</p> <p>A narrative description of expenditure assumptions is provided that demonstrates a clear understanding of the budgeting process.</p> <p>The Budget addressed start-up costs associated with staffing, including benefits, facility costs, materials and services, and contracted services. \$202,500 is budgeted for 4.5 teachers at \$45,000 per year for Year 1.</p> <p>Amounts budgeted for Teacher Training, Other Textbooks and some Student Travel support the core curriculum and service learning program.</p> <p>Amounts are also budgeted to support training for the principal and the business manager.</p> <p>The applicant notes that textbooks will be purchased using instructional materials funds that are awarded in the first year of the school's operation; however, this is intentionally not reflected in SEG operating budget.</p> <p>The school intends to employ a full-time business manager and indicates it has a verbal commitment from a prospective Business Manager.</p> <p>An understanding of lease payment assistance through PSFA is demonstrated. Rent/lease funds included in budget for first year until lease payment assistance available.</p> <p>School does not intend to provide transportation, but understands that students with an Individualized Education Plan (IEP) requiring transportation must be provided with transportation.</p>	<p>pp. 88-92</p> <p>pp. 162-171 (Appendix C)</p> <p>pp. 162-171 (Appendix C)</p> <p>pp. 90 & 91</p> <p>p. 89</p> <p>p. 91</p> <p>p. 92</p> <p>p. 92</p>
<p>Revenue Sources Other Than SEG Funds</p> <p>The applicant intends to apply for</p> <ul style="list-style-type: none"> • Federal Charter Schools Stimulus funds in the amount of \$350,000. (Planning and Implementation Grant) • Instructional materials • Lease-payment assistance funding from PSFA in the estimated amount of \$54,600, and 	<p>p. 92</p>

<ul style="list-style-type: none"> National School Lunch and Breakfast Program funding (A high percentage of eligible students is expected.) <p>No private funds or grants are anticipated or addressed.</p>	
<p>Expenditure Assumptions for Other Than SEG Funds</p> <p>The applicant has provided a list of anticipated expenditure areas for use of the federal stimulus funds if granted. The PSFA Grant will be used to secure a facility.</p>	p. 93-94
<p>Criteria Not Sufficiently Addressed, Concerns & Additional Questions</p>	<p>Reference</p>
<p>Revenue Projection Form 910B5</p> <p>No concerns noted.</p>	
<p>Operating Budget</p> <p>The middle school principal’s salary as budgeted does not meet New Mexico’s minimum salary requirement.</p>	<p>p. 166 <i>During the interview on 8/5/09, the applicants indicated that they were aware of the error and stated the correct Middle School Principal salary of \$70,000 as stated on a chart provided on p. 202 of the application.</i></p>
<p>Revenue and Expenditure Assumptions</p> <p>Clarification needed. In Year one, no special education teacher is budgeted.</p>	<p><i>During the interview on 8/5/09, the applicants stated that this was intentional and that for the first year, a dual-certified teacher would assume special education duties based on need established by the actual student population. If necessary, additional support would be contracted.</i></p>
<p>Revenue Sources Other Than SEG Funds</p> <p>No concerns noted.</p>	
<p>Expenditure Assumptions for Other Than SEG Funds</p> <p>No concerns noted.</p>	

B. FISCAL MANAGEMENT

A plan for fiscal management subsection will be complete if it has addressed the following components:

- A detailed plan indicating how the charter school will manage its fiscal responsibilities.
- A description of the school’s internal control procedures that it will utilize to safeguard assets, segregate its payroll and other check disbursement duties, provide reliable financial information, promote operational efficiency, and ensure compliance with all applicable federal statutes and regulations and state statutes and rules relative to fiscal procedures.
- A description of the manner in which the annual audit of the financial operations of the charter school is to be conducted.

ANALYSIS: FISCAL MANAGEMENT

Criteria Satisfied	Reference
<p>Fiscal Management Plan</p> <p>A clear plan for managing fiscal responsibilities is provided.</p>	pp. 95-98
<p>Internal Control Procedures</p> <p>The application provides a comprehensive description of internal control procedures to be utilized for safeguarding assets, segregation of duties, providing reliable financial information, promote operational efficiency, and ensuring compliance with law.</p>	pp. 99-118
<p>Annual Audit of Financial Operations</p> <p>The application includes a clear description of the manner in which the annual audit of the financial operations of the charter school will be conducted.</p>	p. 103

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>Fiscal Management Plan</p> <p>No concerns noted.</p>	
<p>Internal Control Procedures</p> <p>No concerns noted.</p>	

Annual Audit of Financial Operations	
No concerns noted.	

FINANCIAL PLAN SUMMARY

Inadequate	Approaches	Meets	Exceeds
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ANALYSIS: FINANCIAL PLAN SUMMARY

Strengths

The applicants submitted a completed 910B5 Revenue Projection and a five-year budget spreadsheet, clearly described expenditure assumptions for SEG and revenue sources other than SEG, and overall, demonstrated a clear understanding of public school financial requirements.

Also provided are 1) a clear plan for managing fiscal responsibilities and 2) a comprehensive description of internal control procedures to be utilized for safeguarding assets, segregation of duties, providing reliable financial information, promoting operational efficiency, and ensuring compliance with law.

Concerns and Additional Questions

Although some concerns regarding the financial plan section of the application were identified during the applicant interview and in the preliminary analysis, the applicants satisfactorily clarified those concerns through oral responses (8/5/09) and written responses (submitted 8/11/09 and 8/25/09).

VII. GOVERNANCE /MANAGEMENT PLAN

The Governance/Management Plan should provide an understanding of how the school will be governed and managed. It should present a clear picture of the school’s governance and management practices, what roles and responsibilities various groups and individuals will have, and how those groups will relate to one another. The Plan should outline how decisions are made at the school site, and provide a convincing picture of the school leadership’s capacity to successfully operate the school. In addition, the governing body of a charter school is, first and foremost, publically accountable for student academic performance and the expenditure of public funds.

A. GOVERNANCE STRUCTURE

The Governance Structure subsection will be complete if it has addressed the following components:

- A description of how the school will be governed.
- An organizational chart for the school and a narrative description of the chart that explains the proposed school site-based personnel reporting structure to the governing body and the relationship of the governing body to the school’s leader and administration.
- Delineation of the roles and responsibilities of parent councils, advisory committees and/or community groups in relation to the governing body.
- Policies and procedures by which the governing body will operate that demonstrate an understanding of all applicable statutes and regulations, including the open meetings act.
- Policies and procedures will address:
 - board powers and duties;
 - the criteria and the process that will be used to select the school’s head administrator;
 - budgeting and operation of the school; and
 - how decisions will be made.

ANALYSIS: GOVERNANCE STRUCTURE

Criteria Satisfied	Reference
<p>How the school will be governed</p> <p>The applicant stated that the school will be governed pursuant to the bylaws of the Governing Council. Proposed By-Laws are included as Appendix D.</p> <p>The Governing Council will include a non-voting general membership made up of teaching staff, students and parents which will function in an advisory capacity.</p> <p>The basic responsibilities and primary purpose of the Governing Council are stated.</p>	<p>p. 119 and Appendix D</p> <p>p. 120</p> <p>pp. 120, 122</p>
<p>Organizational chart and narrative description</p> <p>A school organizational chart is provided.</p> <p>The narrative indicates that the Principal is responsible for providing leadership and decision making in the day-to-day operations of the school and is responsible for supervision of all staff.</p>	<p>p. 119</p> <p>p. 120</p>
<p>Delineated roles and responsibilities</p> <p>A Family Advisory Committee will serve to identify and discuss academic, social, and emotional concerns pertaining to students. A</p>	<p>pp. 120-121</p>

<p>Student Government will be established to address students' social concerns. A Parent Advisory Committee will be established to address the school's needs to include, but not limited to fundraising and event coordination. A representative from each committee will sit on the general membership.</p>	
<p>Governing body policies and procedures</p> <p>Proposed Governing Council By-Laws are included as Appendix D. Board powers and duties are addressed. Responsibility for review, approval and monitoring the implementation of the annual budget is addressed</p> <p>The proposed Bylaws state that the GC members will familiarize themselves with the Charter Schools Act; School Personnel Act; Procurement Code; Open Meetings Act; and Public School Finance Act.</p> <p>The applicant further stated that the Council conducts its business in compliance with the Open Meetings Act.</p>	<p>pp. 172 - 183</p> <p>p. 172, Appendix D</p> <p>p. 122</p>

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>How the school will be governed</p> <p>The founders propose to establish an interim Governing Council until a permanent Governing Council is appointed or elected. The proposed By-Laws state that the first regular Governing Council meeting is scheduled for Fall 2010. Charter School rule requires that a Governing Council of a state-chartered charter school qualify as a Board of Finance. Names of the governing council members and an assurance from each member that they have read the application and agree to its submission to the chartering authority must be submitted before a charter will be issued. A founder could become a council member but cannot be an employee or consultant to the school.</p>	<p>p. 119 and p. 180</p>
<p>Organizational chart and narrative description</p> <p>The organizational chart needs clarification. As presented, it appears that the Business Manager oversees the Administrative Assistant, Certified Teachers and other Staff members. The organizational chart included in the application does not appear to clearly represent the narrative description.</p>	<p>p. 119 <i>During the interview on 8/5/09, the applicants clarified that the organizational chart on page 119 was not meant to represent lines of authority, but conceptualized the chart as "layers of the school". The chart on page 127 was intended to represent the way positions interact and support each other. The Principal supervises teachers and other</i></p>

	<i>staff members and the Principal reports to the Governing Council.</i>
Delineated roles and responsibilities No concerns noted.	
Governing body policies and procedures The quorum requirements as stated in the narrative on page 126 (“at least four members”) and in the proposed By-Laws on page 181 (“a simple majority”) do not necessarily agree. A reference is made to “consensus action” on page 181 (By Laws). Consensus actions typically do not require the body to take individual votes on an issue. This procedure would be in conflict with the requirements of the Open Meetings Act.	pp. 126 and 181 <i>The applicants submitted a written response on 8/25/09 to clarify that any conflicts in the proposed by-laws will be addressed and corrected.</i> p. 181, bottom <i>The applicants submitted a written response on 8/25/09 to clarify that the Governing Council will not violate or take any action that would be in conflict with the Open Meetings Act.</i>

B. DESCRIPTION OF THE GOVERNING BODY

The Governing Body subsection will be complete if it has addressed the following components:

- A description of the responsibilities and obligations of the governing body as a whole, individual members, and officers of the governing body.
- A list of each of the members of the school’s governing body.
- A brief description of the qualifications of each member of the governing body.
- A description of the plans for governing body recruitment and selection, including the orientation process for new members and ongoing professional development.
- An explanation of nature and extent of staff, families, and the community involvement in the governance of the school, and how they will be notified of the opportunity to participate in the school governance.

ANALYSIS: DESCRIPTION OF THE GOVERNING BODY

Criteria Satisfied	Reference
Governing body responsibilities and obligations	
A description of the responsibilities and obligations of the governing	p. 174 (Appendix D)

body as a whole and as individual members of the governing body is provided.	
List of governing body members and qualifications	
A list of five (5) interim governing body members and their qualifications is provided. All members are licensed educators.	p. 124-125
General membership categories of the Governing Council are defined (e.g. Professional Educator; Business Professional; At-Large Community Member; etc.)	p. 124
Plans for governing body recruitment, selection, orientation, professional development	
Qualifications for positions on the Governing Council, nomination and recruitment, and filling of vacancies are addressed in the proposed By-Laws, p. 174.	p. 174
Staff, families, and community involvement in governance	
Notification of Governing Council meetings will be posted as part of the school master calendar, the school newsletter and the school’s website.	p. 125
The Governing Council will hear reports and updates “. . . from any general members including but not limited to information from the Family Advisory Committee, the Parent Advisory Committee and the South Valley Preparatory School’s Student Government..	p. 126

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
Governing body responsibilities and obligations	
No concerns noted.	
List of governing body members and qualifications	
The application states that the Founder/Interim Governing Council will ultimately consist of 7 members: the five founders and two additional appointed “at-large community members”. A founder could become a council member but cannot be an employee or consultant to the school.	p. 123
Plans for governing body recruitment, selection, orientation, professional development	
No concerns noted.	

Staff, families, and community involvement in governance	
No concerns noted.	

C. PARTNERSHIPS: *This section is optional and should be completed if the school has identified a partner organization that is essential to the existence of the charter school, its governance, key instructional, and/or management functions.*

The Partnership subsection will be complete if the following components are included:

- Name of the partner organization.
- Name of the contact person at the partner organization and that person’s full contact information.
- A description of the nature and purpose of the school’s partnership with the organization.
- If applicable, an explanation of how the partner organization will be involved in the governance of the school.
- Evidence (in the form of a letter of support or intent to partner) that the school has a formal partnership agreement with the partner organization.

ANALYSIS: PARTNERSHIPS

Criteria Satisfied	Reference
Partner organization and contact information N/A	
Nature and purpose of partnership N/A	
Partner organization involvement with school governance N/A	
Evidence of formal partnership agreement N/A	

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
Partner organization and contact information N/A	
Nature and purpose of partnership	

N/A	
Partner organization involvement with school governance N/A	
Evidence of formal partnership agreement	
N/A	

D. SCHOOL ORGANIZATIONAL STRUCTURE

A School Organizational Structure subsection will be complete if the following components are included:

- Based on the organizational chart provided under subsection *A. GOVERNANCE STRUCTURE* above, a description of the site-based management structure at the school and job descriptions that identify key roles, responsibilities and accountability for each position listed on the organizational chart will be presented.
- A staffing plan for each year of the first charter term, including the proposed pupil-teacher ratio that supports the educational plan.

ANALYSIS: SCHOOL ORGANIZATIONAL STRUCTURE

Criteria Satisfied	Reference
<p>Description of site-based management structure and job descriptions for all organizational chart positions</p> <p>A brief description of the site-based management structure at the school is included.</p> <p>Job descriptions are provided for the Principal, Business Manager, Middle School Teacher 6th-8th, a Special Education Teacher, Art Teacher and PE Teacher.</p>	<p>p. 127</p> <p>pp. 127-129</p>
<p>Years 1-5 staffing plan with pupil-teacher ratio supporting educational plan</p> <p>The staffing plan matches the 5-year budget and maintains a 26:1 Pupil Teacher Ratio. Contracted employees are budgeted if needed.</p>	<p>pp. 129 and 162 (budget)</p>

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>Description of site-based management structure and job descriptions for all organizational chart positions</p> <p>No job description is provided for an administrative assistant.</p>	

Clarification needed regarding responsibilities of Aides.	pp. 130-131 <i>During the interview on 8/5/09, the applicants indicated that the budget would not allow for hiring Aides to support general education students, but if additional funding were available, the job description is in place.</i>
Years 1-5 staffing plan with pupil-teacher ratio supporting educational plan No concerns noted.	

E. EMPLOYEE RELATIONS

An Employee Relations subsection will be complete if the following components are addressed:

- An explanation of the relationship that will exist between the school and its employees, including evidence that the terms and conditions of employment will be addressed with affected employees and their recognized representatives, if any.
- A description of the school's personnel policies and procedures that comply with all applicable federal statutes and regulations, including the School Personnel Act.
- The proposed salary schedules for all employees that comply with the minimum salary requirements as identified in the School Personnel Act.
- A description of the evaluation process for staff that will include evaluation of teachers by a licensed school administrator.
- A description of the school's staff discipline process that provides for due process.

ANALYSIS: EMPLOYEE RELATIONS

Criteria Satisfied	Reference
Relationship between school and employees and terms and conditions of employment Conditions are clearly stated and aligned to statute. The applicants state that South Valley Preparatory School will abide by all requirements and conditions of employment set forth by the School Personnel Act.	p. 134
School's personnel policies and procedures A narrative regarding personnel policies and procedures is included on pages 136-141	pp. 136-141

An Employee Handbook containing all personnel policies and procedures is included as Appendix E, p. 184-198.	pp. 184-198
Proposed salary schedules for all employees	
Teacher salary schedules presented meet minimum salary requirements for each of three-tier licensure.	pp. 199-200
Principal and Assistant Principal salary schedule presented indicate minimum administrative salary requirements for all principal and assistant principal position by school type.	p. 202
Evaluation process for staff	
The school's staff evaluation process is described and includes evaluation of teachers by a licensed school administrator, the Principal.	pp. 144-145
Staff discipline process	
The school's staff discipline process is presented and provides for due process.	p. 146-147

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
Relationship between school and employees and terms and conditions of employment No concerns noted.	
School's personnel policies and procedures No concerns noted.	
Proposed salary schedules for all employees No concerns noted.	
Evaluation process for staff No concerns noted.	
Staff discipline process No concerns noted.	

F. STUDENT ENROLLMENT PROCEDURES AND DISCIPLINE POLICY

A student enrollment procedures and discipline policy section will be complete if the following components are addressed:

- A description of the school’s enrollment policies and procedures, including an explanation of the enrollment timeline.
- A lottery process that is in accordance with applicable law.
- A proposed student discipline policy that complies with the Public Education Department’s Student Rights and Responsibilities [6.11.2 NMAC].

ANALYSIS: STUDENT ENROLLMENT PROCEDURES AND DISCIPLINE POLICY

Criteria Satisfied	Reference
<p>School enrollment policies and procedures</p> <p>Proposed enrollment policies and procedures are presented.</p>	p. 148
<p>Lottery process</p> <p>A description of the lottery process is presented.</p>	p. 151
<p>Proposed student discipline policy</p> <p>A proposed student discipline policy is presented. (Pp.152-153) A supporting detailed Behavior Modification Plan and Unacceptable Behavior Matrix are also included as Appendices G & H. (Pp. 203-209)</p>	pp. 152-153 and pp. 203-209

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>School enrollment policies and procedures</p> <p>No concerns noted.</p>	
<p>Lottery process</p> <p>On page 148 the application states: “All children who apply for enrollment after the lottery are added to the waiting list in the order in which their applications are received.” This procedure does not comply with Charter School law.</p>	<p>p. 148</p> <p><i>The applicants submitted a written response on 8/25/09 to clarify the lottery process and state that the school will comply with all rules and requirements of the Charter School Law.</i></p>
<p>Proposed student discipline policy</p> <p>No concerns noted.</p>	

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G. FACILITIES:

The facilities plan should demonstrate that the applicant group has carefully considered the school’s facilities needs and understands its options for meeting those needs.

Has the applicant group selected or secured a facility? **Yes** **No**

If “NO” a Facilities section will be complete if the following components are addressed:

- An explanation of the school’s needs for a facility that will support the implementation of the school’s educational plan, including desired location, size, and layout of space.
- A reasonable plan for identifying and securing an adequate facility.
- An explanation of the proposed capital outlay needs for the facility, including projected requests for capital outlay assistance for the school.

ANALYSIS: FACILITIES – IF “NO”

Criteria Satisfied	Reference
<p>Explanation of school’s facility needs to support educational plan</p> <p>The applicant states a facility will be secured that has a minimum of 10,000 sq. feet of actual classroom space (6 core classrooms P. 154).</p> <p>Additional space will be needed to house a science lab, a computer lab, and two additional classrooms, and a mini gym.</p> <p>The applicants acknowledge the requirement to be located in a public facility by 2016.</p>	<p>p. 94</p> <p>p. 154</p> <p>p. 154, bottom</p>
<p>Reasonable plan for identifying and securing adequate facility</p> <p>The applicants are currently working with a South Valley Real Estate agent and other Bernalillo County authorities to locate available buildings that align with South Valley Preparatory School’s educational needs. Several possibilities have been explored. The school intends to locate near a variety of public facilities.</p> <p>Proposed facility needs are diagrammed and included as Appendix I, p. 210.</p>	<p>p. 154</p> <p>p. 210</p>
<p>Proposed capital outlay needs</p> <p>First year funding for lease/rent has been provided in the budget. Lease Assistance Grant will be applied for and is expected ranging from</p>	<p>p. 154</p>

\$54,000 in year 1 to \$109,200 in year 5. Contingency plans for temporary facilities are being considered if necessary.	
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Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
Explanation of school’s facility needs to support educational plan Space requirements for administrative staff are not addressed.	p. 94
Reasonable plan for identifying and securing adequate facility No concerns noted.	
Proposed capital outlay needs No concerns noted.	

H. OTHER STUDENT SERVICES

This section will be complete if the following components are addressed:

- A description of the school’s plans for meeting the transportation needs of its students and plans for contracting services for transportation, if applicable.
- A description of the school’s plans for meeting the food services needs of its students and plans for contracting services for food services.
- A description of the school’s plans for providing student access to counseling services and plans for contracting services, if applicable.
- A description of the school’s plans for providing student access to health services and plans for contracting services, if applicable.

ANALYSIS: Other Student Services

Criteria Satisfied	Reference
Transportation Transportation will not be provided other than for students requiring the services as noted in IEPs. The school plans to negotiate with transportation contractors for these services when and if needed. For the future, depending on the needs of its students requiring services, IDEA funds will be used.	p. 92
Food Service The applicant plans to apply for participation in the National School Lunch and Breakfast program as a Provision 2 school. The school	p. 92

anticipates a high percentage of students will be eligible for free or reduced price meals.	
Counseling The applicant states that counseling services will be provided as determined by its Student Assistance Team (SAT) or Family Advisory Committee.	p. 155
Health Services The applicant states that health services will be provided by a contracted qualified health care provider who will be responsible for maintaining student health records. A School Health Advisory Council will be established as required.	p. 155-156

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
Transportation No concerns noted.	
Food Service Other than applying for funding, no details regarding food service are provided. It is not clear if the school will provide food services.	p. 155 <i>The applicants submitted a written response on 8/25/09 to clarify that food services will be provided by a contracted food service provider.</i>
Counseling No concerns noted.	
Health Services No concerns noted.	

GOVERNANCE / MANAGEMENT PLAN SUMMARY

Inadequate	Approaches	Meets	Exceeds
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ANALYSIS: GOVERNANCE / MANAGEMENT PLAN SUMMARY

Strengths

Overall, the application demonstrates a fairly clear understanding of management and governance of a school. The applicants clearly state that the Principal is responsible for providing leadership and decision making in the day-to-day operations of the school and is responsible for supervision of all staff. Roles and responsibilities of parent councils, advisory committees and/or community groups in relation to the governing body are addressed. Proposed Governing Council By-Laws are clear and indicate compliance with the Open Meetings Act. Proposed personnel policies and procedures are included in an Employee Handbook. Enrollment policies and procedures are presented, including a description of the lottery process. Student discipline is clearly addressed. Possibilities for location of the school are being explored and proposed facility needs are diagrammed. Access to health and counseling services is addressed. Transportation will not be provided other than for students requiring the service as noted in IEPs; participation in the National School Lunch and Breakfast program will be applied for.

Concerns and Additional Questions

The organizational chart was not presented in a traditional format, leading to some lack of clarity about the intended reporting structure; however, this concern was partially clarified during the applicant interview process. The organizational chart as presented remains unclear relative to the site-based personnel reporting structure to the governing body.

The applicants referenced the establishment of an “interim” Governing Council. The Governing Council must be clearly established and qualified as a Board of Finance to receive a Charter from the Public Education Commission.

VIII. REQUIREMENTS

The Requirements section of the application addresses the necessary arrangements that school leaders must make to define the respective legal liability and responsibility of the governing body and the Public Education Department. These requirements include, but are not limited to, securing appropriate insurance coverage and identifying waivers that will be sought by the school from the Public Education Department.

A. LEGAL LIABILITY AND INSURANCE COVERAGE:

The legal liability and insurance coverage section will be complete if contains:

- A statement that the charter school will participate in the public school insurance authority and will comply with all applicable rules of that authority.

ANALYSIS: LEGAL LIABILITY AND INSURANCE COVERAGE

Criteria Satisfied	Reference
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<p>Statement of public school insurance participation</p> <p>A statement that the charter school will participate in the public school insurance authority and will comply with all applicable rules of that authority is included.</p>	<p>p. 157</p>
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Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>Statement of public school insurance participation</p> <p>No concerns noted.</p>	

B. WAIVERS

The waivers section will be complete if the following components are addressed:

- A list of the specific waivers that will be requested from the department’s requirements, rules, and provisions including, but not limited to those found in the Public School Code pertaining to individual class load, teaching load, length of the school day, staffing patterns, subject areas, purchase of instructional material, evaluation standards for school personnel, school principal duties, driver education and graduation requirements.
- If any waivers will be requested that are not pertaining to those listed above, the applicable statute and/or state rule that the school is requesting to be waived is cited.

ANALYSIS: WAIVERS

Criteria Satisfied	Reference
<p>List of waivers to be requested from PED</p> <p>No waivers listed.</p>	<p>p. 158</p>
<p>Other waivers not pertaining to PED waivers to be requested from PED; must include applicable statute and/or state rule to be waived</p> <p>None listed.</p>	

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
<p>List of waivers to be requested from PED</p> <p>No concerns noted.</p>	

Other waivers not pertaining to PED waivers to be requested from PED; must include applicable statute and/or state rule to be waived	
No concerns noted.	

REQUIREMENTS SUMMARY

Inadequate	Approaches	Meets	Exceeds
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

ANALYSIS: LEGAL REQUIREMENTS

Strengths
All requirements are addressed.

Concerns and Additional Questions
No concerns noted.