

# CITY OF MILWAUKEE

## PHASE 2: CHARTER SCHOOL APPLICATION

Existing Schools can open for the 2020-21 School Year  
New Schools can open for the 2021-22 School Year



**Deadline: January 4, 2020** No later than 4:30 p.m.

**Deliver to: City Clerk's Office  
City Hall, Room 205  
200 E. Wells St. Milwaukee, WI 53202**

**The application date and time are firm.**

Applications received after the due date and time will not be considered.  
Applications delivered to any other location will not be considered.

**\*\*To confirm your eligibility, please call Gayle Peay at 414-288-1540\*\***

## **GENERAL INSTRUCTIONS**

The Common Council of Milwaukee has established requirements for individuals and groups to follow in applying for a contract to operate a charter school in the City of Milwaukee. Please review the following summary of the application process before turning to the charter school application instructions themselves.

### **When and Where to Submit Applications**

Submit one hard copy of your application by January 4, 2020 4:30 p.m.

**To: Jim Owczarski, City Clerk  
City Hall, Room 205  
200 E. Wells Street  
Milwaukee, WI 53202**

If your application is found to be technically complete, you will be asked to submit one hard copy and nine (9) digital copies.

**Note:** All application materials are subject to the Open Records laws of the State of Wisconsin and City of Milwaukee.

**The Institute for the Transformation of Learning** at Marquette University is available to help answer any questions you may have about applying for a Charter School contract from the City of Milwaukee. ITL can also answer many of your specific questions about the application. For assistance, you can contact **gayle.peay@marquette.edu**.

### **Charter School Planning Grants**

Grants are available from the Wisconsin Department of Public Instruction. For more information go to this website: <https://dpi.wi.gov/sms/charter-schools/grants>

## **Process Overview**

The review process is as follows: Review and approval by a technical reviewer. This review will focus on the completeness of the application. If the application is complete, the reviewer will submit the application to the Charter School Review Committee. If the application is incomplete, the reviewer will find it "technically deficient" and provide the applicant with one opportunity to submit missing information. Once missing information is provided, the technical reviewer will again determine whether the application is complete.

If the reviewer concludes that the application remains technically deficient-either because all the missing information was not provided or it was provided after the deadline set-the reviewer will reject the application. The applicant may appeal this denial to the Charter School Review Committee under Section 330-19 of the City's Code of Ordinances, which states: "An applicant whose application has been denied may, no later than 10 days after receipt of the notice of denial, file with the City Clerk a written request for an appeal hearing before the committee. The City Clerk shall promptly transmit any such request to the committee. The committee shall hear the applicant's appeal within 30 days after receipt of the request for a hearing."

If, however, an applicant submits all missing information on time, the reviewer will certify the application as complete. The application will then be considered on the merits by the Charter School Review Committee.

### **Background Checks.**

If the application is found to be technically complete, the Charter School Review Committee reserves the right to have the technical reviewer conduct a background check on the person/people seeking to establish the Charter School, including its board members, educational leader, and finance manager. The information obtained from the background checks will not necessarily result in either negative or positive decisions regarding the application. Decisions about the use of information obtained from the background checks will be made by the Charter School Review Committee and the Common Council.

### **Review and approval by the Charter School Review Committee**

This review will focus on the merits of the application. The Committee will schedule a public hearing with the applicant and may schedule a site visit, request additional information, or take other actions it deems appropriate to complete its review. The Committee will evaluate the application according to the criteria set forth in the following instructions, and issue findings relating to each application. If the findings are positive, the Committee will recommend approval of the application by the Common Council.

Review and approval by the Common Council. All applications recommended for approval by the Charter School Review Committee will be referred to the Common Council. The City Attorney will prepare a proposed contract, which the Council will also consider. The application and proposed contract will first be considered by a

committee of the Council. Then the full Council will vote on the application and proposed contract. The Council may take any action it deems appropriate: approve, approve with changes, or disapprove.

**Negotiation of a final contract with the City Attorney.**

If the Common Council approves the application and proposed contract, a final contract is then negotiated with the City Attorney.

**Notice to Department of Public Instruction (DPI).**

The City must notify DPI of its intent to give the applicant a charter school contract no later than February 1 prior to the school's opening.

**Conditions to be met before the school can open in fall.**

Staff of the **CSRC** will work with approved applicants to ensure that certain contingencies are in place before the school opens. This information will be provided as part of the contract negotiation with the city attorney.

## HOW TO ORGANIZE YOUR APPLICATION

*Please number all pages of your application and organize your application according to the following format, which corresponds to the format used by the Charter School Review Committee to evaluate applications. Digital files should be saved as one large file.*

**Letter of Intent-** *Your letter of intent should be your cover page*

### **Section I**

Mission and Vision  
 School Governance and Operations  
 Fiscal Management  
 Education Program  
 Other Accountability Measures

### **Section II**

Certification

### **Appendix A**

Copy of Monitoring Practices and Policies

### **Chart of Attachments** (please tab or separate attachments as noted below)

<b>Attachment A</b>	<b>Resumes</b>
<b>Attachment B</b>	<b>Board Resolution Adoption of Manuals</b>
<b>Attachment C</b>	<b>Organizational Chart</b>
<b>Attachment D</b>	<b>Long-range Business Plan</b>
<b>Attachment E</b>	<b>Financial Policies and Procedures Manual</b>
<b>Attachment F</b>	<b>Detailed Budget</b>
<b>Attachment G</b>	<b>Annual Cash Budget</b>
<b>Attachment H</b>	<b>Position Listing</b>
<b>Attachment I</b>	<b>Sources of Revenue</b>
<b>Attachment J</b>	<b>*Existing Schools- Current Budget</b>
<b>Attachment K</b>	<b>Certified Lead Testing Results</b>
<b>Attachment L</b>	<b>Occupancy Certificate</b>
<b>Attachment M</b>	<b>Code Compliance Letter</b>
<b>Attachment N</b>	<b>Certificate of Insurance</b>
<b>Attachment O</b>	<b>Letter from Insurance Agent</b>
<b>Attachment P</b>	<b>Independent Auditor's Engagement Letter</b>
<b>Attachment Q</b>	<b>Auditor's Report on Business Plan</b>
<b>Attachment R</b>	<b>Auditor's Report on Internal Controls</b>
<b>Attachment S</b>	<b>Assessment Plan</b>
<b>Attachment T</b>	<b>Sample of Teacher Work Week</b>
<b>Attachment U</b>	<b>Professional Development Calendar</b>
<b>Attachment V</b>	<b>Agreement with Agencies Serving Children with Disabilities</b>

## SECTION I

### A. Mission and Vision- Key School Design Elements

- A.1- Identify how the school will operate as a legal entity under Wisconsin law.
- A.3- Describe the targeted student population that will school wish to serve.
- A.4- Indicate the grades the school will house, the number of expected students per grade, and the expected number of student per class (for the first five years).
- A.5- State the core beliefs and values of the school.
- A.6- Provide a clear picture of how the mission, vision, and school values and are grounded in research and/or best practices and how they will be operationalized through systems and practices.
- A.7- Describe how the proposed school is innovative in its educational approach and why the community needs this school.
- A.8- Describe the school environment you wish to achieve and how this culture will promote student achievement.
- A.9- Provide a description of the programs and resources that you will use to support the social and emotional needs of the students you plan on serving.
- A.10- Explain how the school leadership will promote shared responsibility and student empowerment in a safe and purposeful learning environment.
- A.11- Describe the means the school will use to achieve racial and ethnic balance reflective of school district. *\* The school must also certify that they will serve at-risk students.*

### B. School Governance and Operations

- B.1- Explain how the school will be governed. Describe the roles and responsibilities of those who will govern the school and those who will manage the school. Include a description of the skills and experiences each board member brings to the board that will help ensure the success of the charter school. Provide resumes for each individual. **(Attachment A)**
- B.2- State the process that will be created for the selection of board members and required training that the board must participate in.
- B.3- State the general duties of the governance board.

- B.4-** Explain how the governance of the school will embody principles of democratic management, including but not limited to parental involvement **(118.40 (1m) (b)6)**.
- B.5-** Describe the method the school will use to ensure parental involvement in the governance of the school and describe the means by which the school proposes to report on the results of this involvement.
- B.6-** Describe procedures the governance board will follow to address parent and teacher concerns.
- B.7** Explain the school's internal procedures for resolution of disputes relating to governance or management of the school or its policies and practices. **(\*Include a board resolution recognizing adoption of the following manuals (Attachment B).**
- Personnel manual
  - Operations manual
  - Parent Handbook
  - Financial Policies and Procedures Manual to include all topics requested in application
  - IDEA Policies and Procedures Manual
- B.8-** Describe the process that the governance will use to hold school leaders accountable and to evaluate itself.
- B-9-** Attach copy of by-laws of board (if available)
- B.10-** Provide an organizational chart governing body and all of the employees. **(Attachment C)**.

## **C. Fiscal Management of School**

- C.1-** Describe a plan for annually auditing the school's finances and identify the firm which will conduct the audit (if selected) **(119.40(1M) (B) 11)**
- C.2-** Describe your school's fiscal management procedures. Provide explanatory material or recent audits that demonstrate knowledge of and compliance with generally accepted procedures for fiscal management, including those related to proper internal controls and investment of funds. **Include a long-range business plan (Attachment D)**.
- C.3- Provide your Financial Policies and Procedures Manual and ensure it includes the following sections: (Attachment E).**
- Annual Budgeting and Budget reporting
  - Cash flow budgeting and reporting

- Generally accepted accounting principles and their application for this institution Internal Controls over major financial processes including cash receipts and disbursements, investments, donations/fundraising, facilities/equipment, procurement-accounts payable, billing-accounts receivable, payroll, travel expense reimbursement, insurance-risk management, grants accounting and reporting, enrollment controls, general ledger-budgetary and accounting controls.
- City of Milwaukee Charter school financial reporting requirements and procedures developed to comply with these requirements.
- Financial reporting to the Board of Directors
- Accounting and financial management qualifications for affected staff

\*For **existing schools**, also provide prior year's financial statements

- Balance Sheet
- Income Statement
- Unqualified audit opinion and management letter, to include Statement of Cash Flows. These financial statements must be audited by a CPA firm licensed to practice in Wisconsin and accompanied by the Firm's audit opinion and management letter.

**C.4-** Identify plan for obtaining capital to open the school and if funds are going to be borrowed. Please indicate potential lenders and the amount of the loan.

## **BUDGET**

**C.5-** Explain the methods for estimating revenues and expenses and plans to manage revenue deficits other contingencies.

**C.6-** Submit detailed Budget with key assumptions. *\*For all new applications two alternate budgets based on 15% enrollment below projected levels and 30% below projected levels should be submitted. (Attachment F)*

### ***To support the budget discuss:***

1. sources and uses of funds
2. basis for revenue estimates
3. methods for estimating revenues and expenses and plans to manage revenue deficits or other contingencies.

*\*To assure consistent reporting, each school's budget revenue and expenditure accounts must directly reconcile to the accounting system line item or objects of expenditure accounts*

- 1) **2%** authorizer fee as a budget expense line
- 2) **Annual cash budget** showing monthly receipts, disbursements and beginning and end of month cash balances with key assumptions. **(Attachment G)**
- 3) **Position listing** of all part- and full-time positions. **(Attachment H)**
- 4) **Line of Credit** or other source(s) of cash (other revenues, reserves, personal guarantees, etc.) as needed for adequate liquidity over the fiscal year. **(Attachment I)**

**\*Existing School-** If your school is already in operation. please also include: and explanation of significant differences from your budget for the upcoming year. Attach the budget for the current school year (**Attachment J**).

**C.7-** Present a plan for raising funds needed beyond the per-pupil allocation provided under state law.

**C.8 -** Describe a description of the school facility, or proposed facility and its layout. Include the number and size of classrooms, common areas, and recreational space. Identify the level of handicapped accessibility (**118.40(1M0(B)14**)

***For applicants that do not have a facility-*** *\*If your proposal is accepted but you do not have a facility yet, you will be issued a conditional charter contingency upon completing arrangements to lease or buy an appropriate facility, and receipt of an occupancy certificate for school use.*

***For applicants that have a facility-*** *\*For applicants that have a facility and existing school applicants, provide the results of certified lead test results. (**Attachment K**)*

**C.9-** Provide an occupancy certificate for school use from the City of Milwaukee Department of Building Inspection, and a copy of a letter from the Building Inspection Department regarding code compliance. (**Attachment L and Attachment M**)

*\*If you have received notice of violations of any health or safety law or code from the Department of Building Inspection, you must submit proof that you have remedied such violations.*

**C.10- ALL APPLICANTS:** Describe any plans you have during the next three years to expand your current facility, open a second facility and/or move to a different facility.

**C.11-** Provide a transportation plan or a rationale for not providing transportation.

**C.12-** Describe how food services will be provided for students, including any plans for contracting services or plans to participate in the National School Lunch Program.

**C.13-** Provide insurance information.

**Instruction to applicant.** The Common Council requires minimum liability insurance coverage. All must be written on an occurrence form except for the errors and omission coverage. The City of Milwaukee shall be named as an additional insured under the Commercial General Liability, Auto Liability and Umbrella policies.

A certificate of insurance acceptable to City evidencing the insurance requirements is to be provided to CSRC. Certification is to be provided on the certificate of insurance (**Attachment N**) with separate letter from the insurance agent or broker that there are no exclusions, sub-limits, or restrictions in coverage as noted in this paragraph (**Attachment O**). The certificate of insurance or policies of insurance evidencing all coverages shall include a statement that City shall be afforded a thirty (30) day written notice of cancellation, non-renewal or material change by any of Charter School insurers providing the coverage required by City for the duration of this Contract. Insurance companies must be acceptable to City and must have a current A.M. Best rating of A- or better.

**All certificates of insurance are to be provided to CSRC within 30 days of final execution of this Contract. If Charter School does not comply with this provision of the Contract, City has the authority to declare this Contract terminated in accordance with the provisions of paragraph II. C. 2.**

The minimum limits of insurance that City requires from Charter School are listed in the contract. Please see attached city charter school contract for updated coverage requirements.

#### **C.14- Provide auditors report.**

##### **For existing and new charter school applicants:**

Three financial requirements for new applicants:

- Independent Audit engagement letter for first fiscal year (**Attachment P**)
- Auditor report on school's long-range business plan and first year budget (**Attachment Q**)
- Auditor report on planned, documented internal controls policies and procedure. (**Attachment R**)

#### **D. Educational Program**

**D.1-** Describe the educational program of the school (**118.40 (1m)(b)(3)**).

**D.2-** Discuss the instructional methodology to be utilized by the by the faculty. (**118. 40(1m)(b)4**).

**D.3-** Describe the research that supports your instructional methodology.

**D.4-** Explain how standards and accountability measures will be integrated into a coordinated system.

**D.5-** Describe how pupil progress to attain the educational goals and expectations of the State of Wisconsin will be determined. (**118.40(1m)5**)

**D.6-** Describe how the school's curriculum will ensure cultural relevancy. Provide an overview of how the particular framework and/or the curriculum materials will address the needs of culturally and linguistically diverse students

- D.7-** Explain how the educational program will serve students with disabilities and comply with all federal laws and regulations.
- D.8-** Explain how the educational program will serve students who are English language learners and comply with all federal laws and regulations.
- D.9- *High School Only***- List your school's graduation requirements and how they, at a minimum, meet state requirements.
- D.10-** Provide an assessment plan in the that will guide the school's assessment of all children in the school. The assessment must include both local measures and a yearly state standardized test, as explained further below  
**(Attachment S)**

*Local measures the school will use to assess student achievement of the school's curricular goals including both qualitative and quantitative measures, for example:*

- *Running records of reading/literacy skills*
- *Local writing assignments (with clear criteria or rubrics)*
- *Mathematics portfolios, showing mastery of content and processes (again with criteria)*
- *IEP goals and benchmarks, showing student achievement on goals*

*Please complete the following matrix **if possible**. (You may use an alternate summary of your local measures if it is of equal clarity and addresses the same elements). Local measures for literacy, mathematics, writing, and IEP goals are required for all years of school operation.*

***If the charter applicant is an existing school***, submit data from required standardized assessments. as well as data from other required assessments (graduation rates, attendance, credit earning, student turnover, grade points, etc.) Any ***existing school*** older than two year is also required to provide evidence of the school's record of performance for at least the past two years. If available, a school should be able to show the student achievement of cohorts of students over time on standardized tests.

**Local Measures Matrix for Elementary Schools**

<b>Core Local Measures For All Years of School Operation:</b>	<b>Description of Outcome</b> (e.g., ability to make a complete sentence, ability to add and subtract 2 and 3 digit numbers)	<b>Measurement or Assessment Form</b> (e.g., writing samples, mastery tests, etc.)	<b>Frequency of Measurement or Assessment</b> (e.g., daily, weekly, monthly)	<b>Students to Whom Measurement or Assessment Applies</b> (e.g., grade level)
1. Literacy				
2. Mathematics				
3. Writing				
4. IEP Goals				

**Local Measures Matrix for High Schools**

<b>Core Local Measures For All Years of School Operation:</b>	<b>Description of Outcome</b> (e.g., ability to make a complete sentence, ability to add and subtract 2- and 3-digit numbers)	<b>Measurement or Assessment Form</b> (e.g., writing samples, mastery tests, etc.)	<b>Frequency of Measurement or Assessment</b> (e.g., daily, weekly, monthly)	<b>Students to Whom Measurement or Assessment Applies</b> (e.g., grade level)
1. Literacy				
2. Mathematics				
3. Writing				
4. IEP Goals				
5. High School Graduation Plan				

**D.11-** How will the school’s assessment system enable the school to identify students in need of academic intervention or acceleration? What process will be used to identify those students?

**D.12-** Identify the staff person and board representative or committee that will be responsible for reporting required student achievement data and other educational reporting items to the CSRC representative.

**D.13-** Describe the management system that the school will use to collect, track, and monitor student data and how the school will ensure the quality and availability of the data.

**D.14-** Provide the school's proposed calendar for the first year of operation and identify the total number of days and hours of instruction. Identify the number of in-service days for teachers. Explain how the calendar will support the stated goals of the educational program.

## **E. Staffing Structure and Professional Development**

***\*Certifications and qualifications of individuals employed in the school are required by state 118.19(1) and 121.02(1)(a)2.***

**E.1-** Describe the school's procedures for ensuring that all instructional staff are appropriately licensed and provide assurances that all staff who will teach in the charter school are currently licensed to teach in Wisconsin or, if not properly licensed by the time the school opens as a charter school. Schools that do not have staff completely identified/hired will be required to provide this assurance before they open. ***\*Certifications and qualifications of individuals employed in the school are required by state 118.19(1) and 121.02(1)(a)2.***

**E.2-** Describe the strategy and process for recruiting, hiring and retaining a quality workforce and provide a timeline.

**E.3-** Provide sample of a teacher work week (**Attachment T**).

**E.4-** Describe how the work environment will foster continuous improvement and reflection.

**E.5-** Describe the school's goals and strategies for ongoing professional development and explain how the plan will be driven by data to improve teaching and learning. Attach a professional development calendar (**Attachment U**)

**E.6-** Describe any additional requirements that the school imposes and explain how the school proposes to evaluate staff. *\*These procedures should be included in the personnel manual.*

## **F. Other Accountability Measures**

**F.1 -** Describe your admissions policy. Charter schools may set admission procedures, but according to state law they may not discriminate against students on the basis of sex, race, religion, national origin, national ancestry, pregnancy, marital or parental status, sexual orientation or physical, emotional or learning disability.

**Please include the following in your admission policy:**

- *\*Explain how the admission procedures will be applied fairly, including use of a lottery should more students apply than there are seats available.*
- *\*Identify admission procedures for students with IEPs.*

***Plan to Educate Children with Disabilities***

**F.2-** Provide a description of your school's plans to comply with Individual Disability Education Act (IDEA) and educate children with disabilities.

- Include the policies and procedures manual describing how you will comply with IDEA.
- Describe any efforts you have made to develop relationships with other agencies to serve children with disabilities, particularly those efforts to provide services for children whom you cannot educate on site. If available, include any documentation describing the agreements with other agencies (**Attachment V**).

**F.3-** Describe other factors the school plans to measure, such as parental satisfaction, attendance, parental involvement, community services, etc. (Measures *may vary widely from application to application. However, they should reflect what the school considers to be significant.*)

**F.4-** Describe the disciplinary procedures the school will use.

**Include the following:**

- Describe the process for disciplining a student.
- Explain the role of parents and staff in that process.
- Explain the grounds for such actions as suspensions and expulsions.
- If the school is already in operation, please summarize disciplinary actions taken during the past school year.

**F.5-** Describe the charter school's plan for technology. Include network capacity, internet access, types of devices that will be available for students and staff, and the number of computing devices available for students. Describe how technology will be supported at the charter school.

**Additional Information for Applicants**

**CPA Selection**

Criteria for selection of a CPA are available from the technical reviewer. Acceptability criteria include experience of the auditing firm in the field of education and results of a recent peer review, among other things.

**Prospective Requirements**

Each school awarded a charter must agree contractually to submit an annual independent audit and management letter to the Charter School Review Committee within 90 days of the close of the fiscal year(s).

**The interpretation, judgment and determination of the Charter School Review Committee in reviewing the reports above will be final.**

## SECTION II: CERTIFICATION

Charter schools must abide by the following provisions of state law and the policy of the City of Milwaukee (open records for contractors with city, background checks). Please read the following list carefully. Initial each section of the list to certify that you understand these requirements and that the school will honor them. Please sign and date the certification in the space provided and return this section with your application.

\_\_\_\_\_ I certify that the school named in this application will not charge tuition to charter students. (Schools may charge tuition for students not eligible for charter status. Charter schools may accept students under other programs such as the Milwaukee Parental Choice Program. However, schools may not receive tuition payments for the same students from more than one program. Schools may also charge reasonable fees for such items as field trips or extracurricular activities.)

\_\_\_\_\_ I certify that the school named in this application will abide by statutory eligibility requirements in determining who is a charter student. State statutes provide that students must meet the following tests: the student is a city resident.

\_\_\_\_\_ I certify that the school named in this application will administer required state examinations. (State law requires charter schools to administer the state's examinations for fourth, eighth and tenth graders.)

\_\_\_\_\_ I certify that the school named in this application is or will be nonsectarian.

\_\_\_\_\_ I certify that the school named in this application will not discriminate in its admission policies or deny participation in any program or activity on the basis of a person's sex, race, religion, national origin, ancestry, pregnancy, marital or parental status, sexual orientation, or physical, mental, emotional or learning disability.

\_\_\_\_\_ I certify that the school named in this application serves at-risk students or, if it does not now serve at-risk students, will serve at-risk students who apply and meet other admission requirements. (State statutes define at-risk students to include students in grades 5 - 12 who are one or more years behind their age group in the number of high school credits attained, or two or more years behind their age group in basic skills levels, and who are also one or more of the following: dropouts, habitual truants, parents or adjudicated delinquents.)

\_\_\_\_\_ I certify that the school named in this application will abide by health and safety codes that apply to public schools, including immunization requirements.

\_\_\_\_\_ I certify that the school named in this application is located in the City of Milwaukee.

*-Continue-*

*-Certification, continued-*

\_\_\_\_\_ I certify that the applicant is not a for-profit entity.

\_\_\_\_\_ I certify that the school named in this application will abide by city requirements for access to records of a contractor with the city.

\_\_\_\_\_ I certify that the school named in this application has conducted criminal background checks on current employees and volunteers and will conduct criminal background checks on all new employees, and that the school will assign only those employees and volunteers who, in the judgment of the school have nothing in their background, including but not limited to pending charges or convictions of criminal offenses, which would render them unfit to work or otherwise have contact with the school's students and employees.

\_\_\_\_\_ I certify that the school named in this application will submit information required by contract, including an annual financial audit, to the sponsor by the date established in the contract.

\_\_\_\_\_ I certify that I understand that the award of a charter school contract is contingent meeting benchmarks identified in the charter school contract.

\_\_\_\_\_ I certify that the school named in this application will comply with federal regulations that apply to charter schools authorized by the City of Milwaukee, including, but not limited to, the provisions in the *Every Student Succeeds Act (ESSA)*.

\_\_\_\_\_ I certify that the school named in this application will comply with the requirements of the CSRC regarding tasks required by the academic monitoring and operations monitoring consultants and any additional monitoring requirements that the CSRC develops as needed during the lifetime of the school's contract with the City of Milwaukee.

\_\_\_\_\_ I hereby certify that I agree to abide by the requirements above and understand that failure to do so may result in revocation of the charter.

\_\_\_\_\_  
Applicant Legal Name

\_\_\_\_\_  
Applicant Signature

\_\_\_\_\_  
Date

## **Appendix A: Academic Performance and Educational Program Monitoring Requirements**

### **A. General reporting requirements for standardized tests:**

1. The Children's Research Center (CRC) will not report standardized test scores for groups of fewer than 10 students.
2. Standardized test results will be reported for all students at each grade level.

*\*For standardized tests that are administered only one time during the school year (in the spring semester), results will be reported for students who were enrolled at that school since the third Friday in the preceding September.*

*\*In addition to electronic data submission, schools must provide CRC with the official printouts of their standardized test results for individual students and for the school, unless CRC has direct access to the data from the test publisher.*

3. When available and as appropriate, year-to-year results will be reported for students who have completed the spring assessment in consecutive years at the same school.
4. All data must be reported in electronic format that is ready for analysis, such as a database or spreadsheet.

### **B. Attendance**

1. CRC will break down attendance data to include excused absences, unexcused absences, days suspended (in-school and/or out-of-school), and expulsions.
2. Each school's definition of "present" will be included in that learning memo for each academic year.

**C. Annual retention and return rates:** CRC will report annual retention rates (i.e., the percentage of students who start the year and remain in the school for the entire year) in addition to the student return rate (i.e., the percentage of students enrolled at the end of the previous school year who are enrolled on the third Friday in September of the current school year).

**D. Teacher retention and return information:** CRC will report teacher retention and return information. The return rate will be the percentage of teachers who are eligible to return who actually return the subsequent year

**E. Definition of a student's last day of enrollment when a student stops attending a school:** If the student does not attend a school for 30 consecutive calendar days, the

student's termination date is the last date the student actually attended the school prior to the 30 consecutive days of absence. Reasons for withdrawal from a school will be gathered and reported to CRC with the annual attendance data.

**F. Valid/reliable measures of reading and mathematics:** To improve the adoption of appropriate local measures, CSRC will instruct CRC to discuss which assessments are considered valid and reliable measures of reading and math progress (e.g., Measures of Academic Progress [MAP] tests for elementary programs, STAR reading/math tests for high school programs, etc.) for new school applicants upon request. Use of these measures is not mandated.

**G. Trend data:** Trend data regarding several outcomes are included in each school's report, typically as appendices. These outcomes include, but are not limited to, attendance, assessment results, and teacher and student return/retention rates.

**H. CSRC scorecard and DPI report card:** Information regarding each school's performance will be included in the body of the report and/or as an appendix to the annual monitoring report.

**I. Planning for students at or above grade level:** CSRC requires schools to plan and provide higher-level plans/activities for students who are at or above grade level in the acquisition of basic skills.

## **II. ELEMENTARY SCHOOL POLICIES AND EXPECTATIONS**

**A.** Each school is required to maintain local measures demonstrating student growth in the following areas: reading, writing, math, and individualized education programs (IEP).

### **B. DPI-required tests:**

1. The Phonological Awareness Literacy Screening (PALS) will be administered to all K4 through second-grade students in the fall and spring of the 2015–16 school year within the timeframe required by DPI.

*Absent a DPI required reading achievement test for first-and second grade students, CSRC, with input from the school leaders and CRC, will determine an appropriate assessment for reading.*

2. The DPI-required achievement tests for third through eighth grades and tenth grade will be administered in the spring of the school year, during the timeframe indicated by DPI.

### **C. Year-to-year achievement measurement**

1. CRC will report the DPI-required assessment results in each school's annual report. When new assessments are implemented, data from the first year will be used by CSRC as baseline data in order to set expectations for performance in subsequent years. When possible, CRC will report year-to-year progress for students who completed the assessments in consecutive school years at the same school. When year-to-year data are available, CSRC will set its expectations for student progress; these expectations will be effective for all subsequent years.
  2. CRC reported PALS results in the annual school reports. Based on the Spring PALS results, the CSRC expectation for students maintaining reading readiness is:  
At least 75% of the first graders who met the summed score benchmark in the spring will remain at or above the second-grade summed score benchmark in the spring of the subsequent year.
- D.** CRC will gather and report information regarding each elementary school's counseling activities regarding high school, information about high school enrollment at the end of eighth grade, and plans for follow-up after a student leaves the elementary school.

### **III. HIGH SCHOOL POLICIES AND EXPECTATIONS**

- A.** As soon as possible, but no later than 60 calendar days after the student's first day of attendance, each new student must be assessed in reading and mathematics to ascertain the student's literacy and math capabilities.
- B.** Each school is required to maintain local measures demonstrating student growth in the following areas: literacy, mathematics, writing, and IEP goals. Additional local measures are encouraged. Local measures need to be designed as running records of student progress to inform teachers' decisions at the instructional level throughout the academic year. The school is responsible for setting an annual standard of performance based on their choice of tool. The school will report actual student performance against that standard.
- C.** Each student shall have a written annual plan for graduation that includes the following:
1. Evidence of parent/guardian involvement;
  2. Information regarding the student's post-secondary plans; and
  3. A schedule reflecting plans for completion of four years of English; three years each of college-preparatory mathematics, science, and social studies; and two years of a foreign language.
- D. Required standardized tests and expectations:**
1. **Required standardized tests:** In addition to reporting ongoing student progress as

demonstrated by the local measures, schools will administer the following tests to prepare all students for post-secondary programs.

- a. Ninth-grade students: All ninth-grade students are required to take all subtests of the ACT Aspire, which assesses progress toward ACT readiness, in the spring of the school year as required by the DPI timeframe.
- b. Tenth-grade students: All tenth-grade students are required to take the DPI- required social studies assessment in the spring of the school year in the timeframe identified by DPI. All tenth-grade students are required to take all subtests of the ACT Aspire which assesses progress toward ACT readiness, in the spring of the school year as required by DPI timeframe.
- c. Eleventh-grade students: All eleventh-grade students are required to take all subtests of the ACT Plus Writing and the ACT WorkKeys in the spring of the school year as required by the DPI timeframe.
- d. Twelfth-grade students: All twelfth-grade students are required to take all subtests of the ACT or ACT Plus Writing in the fall of the school year. Students who would benefit from retaking the ACT are encouraged to do so. Graduates' achievement on the ACT benchmarks will be monitored and reported annually.

*\*Regarding special needs students: Reasonable testing accommodations, such as extra time or an alternative site, must be provided for students with special needs. If a student's IEP team has determined testing to be inappropriate for that student, potential post-secondary institutions should be contacted to determine entrance requirements. A student whose IEP states that DPI- required assessments are not appropriate will be tested using the DPI- designated alternative assessments.*

## **2. Year-to-year achievement expectations:**

- a. Ninth- to tenth-grade Aspire: At least 75% of the students at benchmark in any of the subtest areas or the composite score in the spring of ninth grade are expected to maintain that status in the spring of the subsequent year. At least 60% of the students below benchmark in any of the subtest areas or the composite score are expected to reach benchmark or increase their scale score by at least one point the next spring
- b. Tenth-grade Aspire to eleventh-grade ACT Plus Writing: At least 75% of students at benchmark on any subtest or the composite score in the spring of tenth grade are expected to maintain benchmark status in the spring of the subsequent year on the **ACT Plus Writing**. Progress from the ACT Aspire to the ACT Plus Writing cannot be measured by comparing an increase in scale scores. CRC is examining alternative methods to measure progress for students below benchmark, due to the difference in scale scores used to benchmark the Aspire and the ACT Plus Writing. One of these methods will be selected to report year- to-year progress in the upcoming annual reports.
- c. Eleventh to twelfth grade: There is no measure of progress from eleventh to twelfth grade at this time.

## SECTION IV – CHECKLIST \*To be completed by technical reviewer

**Applicant Instructions:** In the second column, identify the location of the required item in the application. This could include page number in application or attachment. Several items are not applicable to start-up schools; you will be required to provide them before the school can open. Timelines for these items will be outlined in the charter school contract.

Required Item Description	Location(s) in application	Present*
Letter of Intent		
Mission and vision of the charter school		
Name of "person" applying to operate the charter school		
Articles of Incorporation		
By-Laws		
Tax determination letter		
Evidence of CMO non-profit status, if applicable		
Board member resumes		
Board resolution adopting the organizational handbooks and manuals		
Personnel Manual (includes qualifications to be met by persons employed in the school; policies the school will follow in conducting background checks, staff recruitment and retention, and procedures for ensuring instructional staff are appropriately licensed)		
Operations Manual		
Parent Handbook		
Financial Policies and Procedures Manual		
IDEA Policies and Procedures Manual		
Evidence of conflict of interest policy		
Evidence of internal dispute resolution policies		
Evidence of how parents will be involved in school governance		
Organizational Chart of management and staff		
Educational leader resume		
Business manager resume		
Describes the organizational structure and responsibilities of the management and staff.		
Describes the school's fiscal management procedures.		

<p><b>Identify the following items in the Financial Policies and Procedures Manual</b></p> <ul style="list-style-type: none"> <li>• Annual budgeting and budget reporting</li> <li>• Cash flow budgeting and reporting</li> <li>• GAAP and their application for this institution</li> <li>• Internal controls over major financial processes including cash receipts and disbursements, investments, donation/fundraising, facilities/equipment, procurement- accounts payable, billing-account receivable, payroll, travel expense reimbursement, insurance risk management, grants accounting and reporting, enrollment controls, general ledger-budgetary and accounting controls</li> <li>• City of Milwaukee Charter School financial reporting requirements and procedures developed to comply with these requirements</li> <li>• Financial reporting to the Board of Directors</li> <li>• Accounting and financial management qualifications, including professional development requirements for affected staff.</li> </ul>		7 items
<b>Long range business plan</b>		
Detailed budget with key assumptions with two alternate budgets based on 15% below and 30% below project enrollment levels		
Assurance that school's budget revenue and expenditure accounts directly reconcile to the accounting system line item or objects of expenditure accounts		
Annual cash budget showing monthly receipts, disbursements and beginning and end of month cash balances with key assumptions		
Budget includes 2% fee for authorizer		
Position listing of all part- and full-time staff		
Sources and uses of funds		

Basis for revenue and expense estimates		
Contingency plan for revenue shortfalls		
Number of expected charter school students		
Monthly cash flow projections for first year of operation as a charter school		
School Budget for the current school year, if applicable		
Explanation of differences between current school year budget and proposed charter school budget		
Facility description		
Proof of ownership or tenant status		
Building Inspection letter affirming code compliance		
Occupancy permit		
Plans to expand or move		
Certificate of insurance with adequate coverages		
<b>Letter from insurance provider</b>		
Evidence that City shall be afforded thirty (30) day written notice of cancellation, non-renewal, or material change by any of the Charter School insurers.		
Independent Audit engagement letter for first fiscal year		
Auditor report on school's long range business plan and first year budget		
Auditor report on planned, documented internal controls policies and procedures		
Academic goals are present		
Curriculum		
Method of instruction		

Description of specific student assessment measures		
Explanation of how school's accountability system incorporate CSRC assessments		
Identification of staff person and board rep. or committee reporting to CSRC		
Student Information Management Software ID		
Existing student achievement data, if applicable		
Other accountability measures		
Listing of instructional staff		
Description for ensuring all instructional staff are licensed		
Assurance that identified staff are licensed; plans for those who need emergency certification		
Admission Procedures		
Description of lottery process for over-enrollment		
Description to achieve racial and ethnic balance reflective of the school district		
Certification that the school will accept at-risk students		
Description of admission procedures for students with IEPs.		
Description of disciplinary procedures		
For existing schools, a summary of disciplinary actions taken during the previous school year		
Evidence of relationship with other agencies to provide services		
Curriculum adaptations		

Proposed staffing adequate to meet obligations under IDEA		
Data on students with special needs for existing schools		
Certification signed and dated		
<b>FOR applicants currently operating a school</b> The applicant has created a new organization to operate the charter school		<b>YES/NO*</b>
The applicant has communicated to parents that students will need to enroll in the charter school		<b>YES/NO*</b>
<b>FOR applicants currently operating a sectarian school</b> Application describes a program which is nonsectarian in its practices, programs, admission policies, employment practices and all other		<b>YES/NO*</b>
Website communicates nonsectarian nature of school		<b>YES/NO*</b>
Name of school communicates nonsectarian nature of school		<b>YES/NO*</b>

**\*To be completed by Technical Review**