

Thomas B. Fordham Foundation Charter School Application Evaluation Rubric

A team of evaluators will review applications and interview applicants. Evaluation Teams are comprised of evaluators with experience and expertise in a variety of fields, including but not limited to curriculum and instruction, special student populations, law, governance, management, leadership, finance, school start-up, and policy.

Evaluators will use the following Evaluation Rubric to rate applicant responses to the questions in the Request for Application. Within each section, specific criteria define the expectations for an excellent response that 'Meets the Standard.'

Rating Characteristics

Meets the Standard:

The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant's capacity to carry out the plan effectively.

Approaches the Standard:

The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.

Partially Meets the Standard:

The response meets the criteria in some respects but has substantial gaps in a number of areas.

Does Not Meet the Standard:

The response is wholly undeveloped or significantly incomplete; demonstrates lack of preparation; or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.

Financial Plan: B.1.

B.1. Budget

A strong application will include:

New School

1. Detailed assumptions of the calculations used to estimate revenues and expenditures for years one through five.
2. Expected staff positions along with salary and benefit estimates must be included for years one through five.
3. Current Demographic Enrollment Data (race, gender, ED status and special education)
4. Include the specific federal grants the school has applied for and/or participates in.
5. Agreements from any outside source (e.g., banks, lending institutions, corporations, foundations, grants, etc.) from which the school will be receiving funds, property, or resources.

A strong application will include:

New to Fordham Sponsorship.

1. 5 year forecast with assumptions.
2. Annual budget.
3. Current Demographic Enrollment Data (race, gender, ED status and special education)
4. Detailed assumptions of the calculations used to estimate revenues and expenditures must be included. Include the specific federal grants the school has applied for and/or participates in.
5. Agreements from any outside source (e.g., banks, lending institutions, corporations, foundations, grants, etc.) from which you a receiving funds, property, or resources.
This would include lines of credit.

Financial Plan: B.2.

B.2. Financial Management

A strong application will include:

1. The systems and procedures for managing the school's finances and identify the staff position(s) that will be responsible for financial oversight and management, as well as their relevant qualifications to manage this work.
2. Vendors used to support finance and operations.
3. If using an education management entity, the three most recent years of the entity's audited financials have been provided.

Financial Plan: B.3.

B.3. Transportation/Food Service/Other Partnerships

A strong application will include:

1. How the school provides/ will provide transportation for students.

2. The transportation plan for all students, including those with special needs, and explain budget revenue and expenditure assumptions. Include any agreement with the district.
3. How the school provides food service and if the school participates in Community Eligibility or Provision 2.
4. Any types of health services provided and if they are provided by staff or vendor.
5. Any other partnerships or contractual relationships central to the school's operations or mission.

Financial Plan: B.4.

B.4. Insurance

A strong application will include:

1. A certificate of coverage that describes the level of insurance coverage that will be obtained, at least equal to the amount set forth in the contract requirements, attached as a resource. If the minimum is not met, how any adjustments would be made.

Financial Plan: B.5.

B.5 Pre-Opening Plan

New Schools only. A strong application will include:

1. A plan that documents key tasks including, but not limited to financial arrangements and management, leadership, facilities, state and statute requirements, students, parents and community. The plan should include responsibility and specific duties of individuals involved.
2. Attachment: timeline and schedule in alignment with the plan.