

# Guide to State Board of Education Public Charter School Proposal Appeals and Mediation



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Prepared by the  
**OREGON DEPARTMENT OF EDUCATION**  
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# Guide to State Board of Education Public Charter School Appeals and Mediation

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### **Links to Relevant Statutes, Rules and Policies**

[Oregon Department of Education Charter Schools](#)

[ORS 338.045, 338.055, 338.075](#)

[OAR 581-026-0050, -0055, -0060, -0065, -0110](#)

[State Board Policy #303](#)

It is a policy of the State Board of Education and a priority of the Oregon Department of Education that there will be no discrimination or harassment on the grounds of race, color, sex, marital status, religion, national origin, age, sexual orientation, or disability in any educational programs, activities or employment. Persons having questions about equal opportunity and nondiscrimination should contact the Deputy Superintendent of Public Instruction at: Oregon Department of Education, 255 Capitol Street NE, Salem, Oregon 97310; phone 503-947-5740; or fax 503-378-4772.

## **Foreword**

Oregon's Public Charter School Law, Chapter 338 of the Oregon Revised Statutes (ORS), was enacted in May 1999. This legislation provided an opportunity for "parents, educators, and community members to take responsible risks to create new, innovative, more flexible ways of educating all children within the public school system" (ORS 338).

The Legislature's goals for Oregon public charter schools are to:

- Increase student learning and achievement;
- Increase choices of learning opportunities for students;
- Better meet individual student academic needs and interests;
- Build stronger working relationships among educators, parents and other community members;
- Encourage the use of different and innovative learning methods;
- Provide opportunities in small learning environments for flexibility and innovation, which may be applied, if proven effective, to other public schools;
- Create new professional opportunities for teachers;
- Establish additional forms of accountability for schools; and
- Create innovative measurement tools.

Charter schools are semi-autonomous public schools of choice. Student admission to a charter school is open and lottery-based; the only admission criteria are age, grade, and space available. Charter schools are operated by non-profit corporations rather than by local school districts. A charter school is authorized, or sponsored, through a charter contract with a local school district board (or, through appeals, the State Board of Education). Charter schools must incorporate all state content standards into their curriculum, participate in the statewide assessment system, and comply with all health and safety, instructional minutes, special education, and civil rights laws, among others. However, they have considerable flexibility in terms of curriculum, organizational structure, budgeting, schedule, staffing, and are exempt from some regulations applicable to traditional public schools.

The Guide to State Board of Education Charter School Proposal Appeals and Mediation was developed to provide information in a clear and consistent manner to assist stakeholders (districts, applicants, etc.) to better understand the different appeals throughout the proposal process and State Board of Education (SBE) mediation process. This Guide provides timelines and information related to the process and defines expectations for applicants, districts, and staff involved in the processes.

Questions regarding this guidance and charter school processes should contact the Oregon Department of Education:

**Kate Pattison, Charter School Specialist**  
Office of Learning, Oregon Department of Education  
255 Capitol St NE, Salem, OR 97310  
[kate.pattison@state.or.us](mailto:kate.pattison@state.or.us)  
Direct: 503-947-5691  
Fax: 503-378-5156

## APPEALS

In order for a public charter school to operate in Oregon, a developer must submit an application to a local school district board for consideration. The process for an application to be reviewed, evaluated, and approved or denied is outlined in the public charter school laws (ORS 338 and OAR 581 Division 26). There are three opportunities for an applicant to appeal a school district board denial. Each of these appeals is described within this section of the guide.

### **Completeness**

All charter school proposals must initially be submitted to a local school district board for consideration. Upon receipt of a proposal, the school district will determine whether the proposal addresses all of the requirements in the law and the district policy. The district has 30 days to determine if the proposal is complete and provide notification to the applicant. If the proposal is not deemed complete, the district must identify the specific elements of the proposal that are not complete and provide a reasonable opportunity for the applicant to resubmit the proposal. The applicant may submit a revised proposal addressing the elements identified by the district as incomplete. This process may continue until the district deems the proposal or complete or until the applicant does not submit a proposal within the time provided by the district. If the applicant does not submit a revised proposal within the time provided by the district, the district may vote to deny the proposal.

### ***Appeal of School District Denial of Incomplete Proposal***

If the proposal has been denied by the school district during the completeness determination process for not being revised and submitted in the time provided by the district, the applicant may appeal the decision to the State Board of Education (SBE). If the applicant would like to appeal the decision by the district to deny the proposal, the request for an appeal must be made within 30 days of the decision. The appeal request should be emailed or mailed to the charter school specialist and the SBE officer. All administrative functions of the appeal have been delegated to staff who will conduct a review of the proposal and issue a final order within 30 days of the request for the appeal.

Using the SBE Completeness Rubric, department staff will review the proposal based on the requirements outlined in the law and the district policy. If the proposal is deemed to be complete, a final order will be issued remanding the proposal to the school district for consideration. If the proposal is deemed to be incomplete, a final order will be issued upholding the school district decision.

### **Proposal Review and Resubmission**

Within 60 days of the notification that the proposal is complete or a final order remanding the proposal for consideration, the district must hold a public hearing on the proposal. The school district must also evaluate the proposal using the criteria in law. Within 30 days of the public hearing, the school district must either approve or deny the proposal and provide written notice of the decision. If the proposal is denied, the notice must provide reasons and suggestions for remediation. The school district may identify a reasonable opportunity for the proposal to be resubmitted.

If an applicant resubmits the proposal to the school district, the school district must approve or disapprove the proposal within 30 days.

### ***Appeal of School District Denial of Resubmitted Proposal***

If the resubmitted proposal has been denied by the school district, the applicant may appeal the school district decision to the SBE. If the applicant would like to appeal the decision by the district to deny the resubmitted proposal, the request for an appeal must be made within 30 days of the decision. The appeal request should be emailed or mailed to the charter school specialist and the SBE officer. All administrative functions of the appeal have been delegated to staff who will conduct a review of the proposal and issue a final order within 30 days of the request for the appeal.

Using the Proposal Process Checklist and Proposal Evaluation Rubric, department staff will review the process used by the school district, evaluate the proposal based on the criteria outlined in the law and the district policy, and the reasons stated by the school district for denial. If the process used by the district is deemed to meet the requirements of the law, the proposal does not meet the criteria in the law and district policy, and the reasons stated by the school district for denial are all deemed to align with the law, a final order will be issued upholding the school district denial. If the process used by the district does not meet the requirements of the law, the proposal meets the criteria in the law and district policy, and/or the reasons stated by the school district for denial are not deemed to align with the law, a final order will be issued remanding the proposal back to the school district for reconsideration.

A final order issued under this appeal may be subject to a judicial review if pursued by the recipient.

### **Proposal Reconsideration**

Within 60 days of a final order remanding the resubmitted proposal for reconsideration, the district must evaluate the resubmitted proposal using the criteria in law and vote to approve or deny the resubmitted proposal. If the proposal is denied, the notice must provide reasons and suggestions for remediation.

An applicant whose resubmitted proposal to start a public charter school is disapproved following reconsideration may request the SBE review the decision.

### ***Appeal of School District Denial of Reconsidered Proposal***

If the resubmitted proposal has been denied by the school district during the reconsideration, the applicant may appeal the school district decision to the SBE. If the applicant chooses to appeal the decision by the district to deny the resubmitted proposal, the request for an appeal must be made within 30 days of the decision. The appeal request should be emailed or mailed to the charter school specialist and the SBE officer. All administrative functions of the appeal have been delegated to staff who will conduct a review of the proposal. At the conclusion of the administrative review, staff will present a recommendation to the SBE for decision.

Using the Proposal Process Checklist and Proposal Evaluation Rubric, department staff will review the process used by the school district, evaluate the proposal based on the criteria outlined in the law and the district policy, and the reasons stated by the school

district for denial. If the process used by the district is deemed to meet the requirements of the law, the proposal does not meet the criteria in the law and district policy, and the reasons stated by the school district for denial are all deemed to align with the law, the SBE will uphold the district denial and issue a final order within 75 days of the staff recommendation to the SBE.

If the process used by the district is deemed to meet the requirements of the law, the proposal does meet the criteria in the law and district policy, and the reasons stated by the school district for denial are all deemed to align with the law, the SBE will contact the applicant and the district to provide an opportunity for both parties to agree to a remand of the proposal to be approved for sponsorship by the district. If both parties agree, a final order will be issued remanding the proposal back to the school district for sponsorship. A final order issued under this appeal may be subject to a judicial review if pursued by the recipient.

If both parties do not agree to the remand, the SBE will vote on whether or not to conduct a rigorous evaluation and consider becoming the sponsor of the charter school. A description of the process for SBE sponsorship can be found in the Guide to State Board of Education Public Charter School published on the Department's charter school website.

## STATE BOARD MEDIATION SERVICES

If the school district board and the applicant are unable to agree on a change during the proposal or chartering process, either party may request mediation. Mediation is a form of facilitated decision-making between multiple parties with the intention of resolving a dispute and coming to agreement. The mediator is an impartial person with knowledge of public education and charter school laws, but not involved in or connected to the dispute being mediated. The process requires cooperation from all involved parties in order to be successful, even if an agreement is not the outcome.

The State Board of Education has delegated the responsibilities of mediation to the Department of Education, which contracts with an experienced pool of qualified mediators across the state. These services are provided at no cost to the applicant or the school district.

### **Requesting Mediation**

At any time during the proposal or chartering process, the school district board or the applicant may request mediation services. To do this, the Mediation Request Form must be completed and emailed or faxed to the Oregon Department of Education charter school specialist. The charter school specialist coordinates all mediations and secures independent contractors to act as the mediator.

Once the Mediation Request Form has been received, the charter school specialist will make contact with both parties to determine whether or not both parties agree to enter into mediation. Mediation is only successful when both parties agree to participate in the process. If there is general agreement, the charter school specialist will initiate a work order with a contracted mediator. The mediator will make contact with each party of the dispute within 3 days of the initiated work order and typically within 5-7 days of submitted the request for mediation. If one party declines to enter into mediation, the proposal or chartering process must continue.

Mediation is completely confidential and once both parties have signed an Agreement to Mediate, the Department and the State Board are not included in the specific details of the mediation. A timeline for mediation will be established with the mediator once both parties have signed the agreement to mediate, however all mediation final reports must be submitted to the department within the following maximum timelines:

- Proposal Process Disputes: 45 days from initiated work order
- Charter Contract Negotiation Disputes: 60 days from initiated work order

## **Materials and Participation**

Each mediation will require both parties to provide related materials to the mediator to review before scheduling the first session. The specific documents required will be determined initially by the charter school specialist and may vary from case to case. The mediator may request additional materials to be provided by each party throughout the mediation process. Typically the documents required for mediation will be those listed below:

- **Materials for Proposal Process Disputes:** Current version of the proposal being considered by the district, copies of communication between the applicant and the district, testimony and minutes from school board meetings and/or public hearings, rubrics or scoring guides used by the district, and all documents related to any appeals (if applicable).
- **Materials for Charter Contract Negotiation Disputes:** Most recent charter contract (if applicable) and any relevant documents used by the charter school and/or the school district during negotiations (e.g. application, renewal evaluation, annual reports, school report cards, charter school evaluation reports, site visit reports, performance frameworks, etc).

Mediation is only successful when both parties participate, regardless of the outcome. Each mediation will be tailored to meet the needs of the parties involved and may include meetings at a neutral site, telephone calls, and/or web-based meetings. Expectations for participation and ground rules for conduct will be stated in the agreement to mediate. Each party is expected to abide by the agreed upon expectations and questions should be addressed to the mediator. If there are concerns about the process and/or the mediator, these can be brought to the charter school specialist.

## **Following Mediation**

Mediation will conclude when both parties reach an agreement or when mediation reaches an impasse. The mediator will write a final report summarizing the outcome of the mediation. If the school district board and the applicant are unable to reach an agreement following mediation, the proposal or chartering process must resume where it left off. For the proposal process, the most recent proposal submitted without the change that was the subject of mediation shall be the proposal the school district board and applicant address in the next step of the proposal process. For charter contract negotiations, the parties must continue negotiating until there is an agreement or other legal action concludes the process.

# Mediation Request Form OAR 581-026-0110

Please complete this form and send to the Oregon Department of Education (ODE) in one of the follow methods of delivery:

Email: [kate.pattison@state.or.us](mailto:kate.pattison@state.or.us)

FAX: 503-378-5156

ATTN: Kate Pattison, Charter School Specialist



**Public Charter School Contact Information:**

Name of Charter School	
Contact Person	
Email	
Phone	
Address	

**School District Contact Information:**

Name of School District	
Contact Person	
Email	
Phone	
Address	

**TYPE OF MEDIATION REQUEST:**       Proposal Process Dispute       Charter Negotiation Dispute

Please explain the reason why you are requesting mediation	
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**Please include a timeline outlining meetings and actions taken to date:**

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# Oregon State Board of Education Charter School Proposal Completeness Rubric



Released January 2014

Prepared by the  
**OREGON DEPARTMENT OF EDUCATION**  
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<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Rating, and Rationale</b></p>
<p>(a) The identification of the applicant</p>	<p>Applicant identification is evidenced by a listing of the names of key school founders.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(b) The name of the proposed public charter school</p>	<p>The proposed public charter school name is evidenced by a clear indication of the name.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(c) A description of the philosophy and mission of the public charter school</p>	<p>The philosophy is evidenced by a clear description of the proposed school’s approach to education. The mission is evidenced by clear statements that convey the school’s vision for the education of its students.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(d) A description of the curriculum of the public charter school</p>	<p>The curriculum description is evidenced by an explanation of the instructional approach/methodology and an outline of each content area addressed within the public charter school.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Rating, and Rationale</b></p>
<p>(e) A description of expected results of the curriculum and the verified methods of measuring and reporting objective results that will show the growth of knowledge of students attending the public charter school and allow comparisons with public schools</p>	<p>Proposal outlines the expected results of the curriculum, such as student and school outcomes and goals. Plans to measure outcomes with verified methods and objective reporting are evidenced by a plan for assessing student and school goals. Oregon State Assessments and other means of yielding data that allow for comparisons with other public schools are described.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(f) The governance structure of the public charter school</p>	<p>The governance structure is evidenced by assurances of non-profit and tax-exempt status and description of key features of the school's governance model.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(g) The projected enrollment to be maintained and the ages or grades to be served</p>	<p>Enrollment is evidenced by a description of anticipated ages or grades served.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(h) The target population of students the public charter school will be designed to serve</p>	<p>The target population to be served is evidenced by a description of student demographics and characteristics.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Rating, and Rationale</b></p>
<p>(i) A description of any distinctive learning or teaching techniques to be used in the public charter school</p>	<p>Distinctive learning and teaching techniques are evidenced by a description of educational model(s), activities, and/or delivery strategies that will characterize the school.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(j) The legal address, facilities and physical location of the public charter school, if known</p>	<p>School’s address, if known, and legal/mailling address.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(k) A description of admission policies and application procedures</p>	<p>The admission policies and application procedures are described or provided.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(L) The statutes and rules that shall apply to the public charter school</p>	<p>Statutes and Rules that apply to the school are evidenced through a written statement of compliance with all laws listed as applicable to charter schools in ORS 338.115(1).</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Rating, and Rationale</b></p>
<p>(m) The proposed budget and financial plan for the public charter school and evidence that the proposed budget and financial plan for the public charter school are financially sound</p>	<p>Demonstration of a sound budget and financial plan is evidenced by documentation of a multi-year budget, accurate projection of revenues and expenditures based on prevailing costs and other factors that contribute to solvency.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(n) A description of the financial management system for the public charter school, an explanation of how the financial management system will meet the requirements of ORS 338.095 (1) and a plan for having the financial management system in place at the time the school begins operating;</p>	<p>The financial management systems are evidenced by documentation of board and staff management responsibilities, fiscal policies, and an explanation of how the systems will meet the requirements of ORS 338.095 (1). It must also include a description of how the school will have these systems in place at the time school the school begins operating.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(o) The standards for behavior and the procedures for the discipline, suspension or expulsion of students</p>	<p>Description of standards for student behavior and accompanying discipline procedures, which include suspension and expulsion procedures.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(p) The proposed school calendar for the public charter school including length of school day and school year</p>	<p>The school calendar is evidenced by a description or calendaring of school days; the length of the school year and the length of a school day.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Rating, and Rationale</b></p>
<p>(q) A description of the proposed staff members and required qualifications of teachers at the public charter school</p>	<p>All proposed staff positions and qualifications are described.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(r) The date upon which the public charter school would begin operating</p>	<p>The operational date is evidenced by a clear statement of projected start date.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(s) The arrangements for any necessary special education and related services provided pursuant to ORS 338.165 for children with disabilities who may attend the public charter school</p>	<p>The arrangements for special education and related services are evidenced in a description which aligns with ORS 338.165.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(t) Information on the manner in which community groups may be involved in the planning and development process of the public charter school</p>	<p>A description of plans to involve the community in the planning and development of the public charter school are described.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(u) The term of the charter</p>	<p>The term of the charter is evidenced by a proposed beginning and ending date for the charter contract.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Rating, and Rationale</b></p>
<p>(v) The plan for performance bonding or insuring the public charter school, including buildings and liabilities</p>	<p>The insurance plan is evidenced through a description of the types and levels of insurance coverage the school plans to purchase or a description of the plan to secure performance bonding.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(w) A proposed plan for the placement of public charter school teachers, other school employees and students of the public charter school upon termination or non-renewal of a charter</p>	<p>The plan for placement of staff and students (in the event of non-renewal or termination) is evidenced through a written description of the process to be used.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(x) The manner in which the program review and fiscal audit will be conducted</p>	<p>The plans for review of the program and municipal fiscal audits are evidenced in a description of how both will be accomplished</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements</b> <b>ORS 338.045 (2)</b></p>	<p><b>Evidence, Rating, and Rationale</b></p>
<p>(y) In the case of an existing school being converted to charter status:</p> <p>(A) The alternative arrangements for students who choose not to attend the public charter school and for teachers and other school employees who choose not to participate in the public charter school; and</p> <p>(B) The relationship that will exist between the public charter school and its employees, including evidence that the terms and conditions of employment have been addressed with affected employees and their recognized representatives, if any.</p>	<p>(A) Alternative arrangements for staff or students who choose not to be in the public charter school is evidenced by a plan.</p> <p><input type="checkbox"/> <b>At least minimally addresses requirement</b>      <input type="checkbox"/> <b>Does not minimally address the requirement</b></p> <p><b><u>Explain rationale for rating:</u></b></p> <p>(B) Description of the relationship between the public charter school and its employees, should they choose to remain at the school once converted to charter, with evidence that all employment terms and conditions have been addressed.</p> <p><input type="checkbox"/> <b>At least minimally addresses requirement</b>      <input type="checkbox"/> <b>Does not minimally address the requirement</b></p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements</b> <b>ORS 338.045 (3)</b></p>	<p><b>Evidence, Rating, and Rationale</b></p>
<p>(a) Additional information the school district board considers relevant to the formation or operation of the public charter school</p>	<p>The proposal addresses any additional information the school district board includes as required components of the charter school proposal as documented in the school district board policy or administrative regulations.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(b) Each member of a proposed public charter school governing body must provide an acknowledgement of understanding related to the standards of conduct and the liabilities of a director of a nonprofit organization, as those standards and liabilities are described in ORS chapter 65, if the public charter school is organized as required by ORS 338 035 (2)(a)(B) and (C)</p>	<p>List of charter school governing board directors is included with an acknowledgement of understanding signed by each director.</p> <p> <input type="checkbox"/> <b>At least minimally addresses requirement</b> <input type="checkbox"/> <b>Does not minimally address the requirement</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>

# Oregon State Board of Education Charter School Proposal Evaluation Rubric



Released October 2014

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<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
<p>(a) The identification of the applicant</p>	<p>Applicant identification is evidenced by a listing of the names of key school founders.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Specification of each person’s role with the proposed school and relevant experience/expertise.</i></li> </ul> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(b) The name of the proposed public charter school</p>	<p>The proposed public charter school name is evidenced by a clear indication of the name.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>A consistent use of the name throughout the proposal.</i></li> </ul> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(c) A description of the philosophy and mission of the public charter school</p>	<p>The philosophy is evidenced by a clear description of the proposed school’s approach to education. The mission is evidenced by clear statements that convey the school’s vision for the education of its students.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Clear, focused and compelling</i></li> <li>• <i>Likely to improve education outcomes</i></li> <li>• <i>Expresses a clear guiding purpose</i></li> <li>• <i>Identifies priorities that are consistent with the intent of ORS 338.015</i></li> </ul> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(d) A description of the curriculum of the public charter school</p>	<p>The curriculum description is evidenced by an explanation of the instructional approach/methodology and an outline of each content area addressed within the public charter school. <i>The description includes how the school’s comprehensive education</i></p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
	<p><i>program will meet the needs of ALL students, particularly academically low-achieving students</i></p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Curriculum framework is clearly presented, aligned with the school’s mission, and provides an appropriate level of detail for objectives, content, and skills for each subject and for all grades the school will serve</i></li> <li>• <i>Curriculum is supported by research and/or by applicant experience</i></li> <li>• <i>Educational program is a good match for the target student population</i></li> <li>• <i>A clear outline of how the school will monitor the implementation of the curriculum</i></li> <li>• <i>A cohesive and coherent description of all components</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(e) A description of expected results of the curriculum and the verified methods of measuring and reporting objective results that will show the growth of knowledge of students attending the public charter school and allow comparisons with public schools</p>	<p>Proposal outlines in detail the expected results of the curriculum, such as student and school outcomes and goals. Plans to measure outcomes with verified methods and objective reporting are evidenced by a well- developed and comprehensive plan for assessing student and school goals. Oregon State Assessments and other means of yielding data allowing comparisons with other public schools are clearly described.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Alignment with school’s mission</i></li> <li>• <i>Goals are clear, specific, measureable, ambitious and attainable</i></li> <li>• <i>Objectives follow clearly from the goals</i></li> <li>• <i>A clear plan for the school to meet AYP</i></li> <li>• <i>Clear realistic strategies for improving student achievement and closing achievement gaps</i></li> <li>• <i>Understanding of and strategy for complying with state achievement and reporting requirements</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
<p>(f) The governance structure of the public charter school</p>	<p>The governance structure is evidenced by assurances of non-profit and tax-exempt status and description of key features of the school's governance model.</p> <p><b>Preferable factors:</b></p> <ul style="list-style-type: none"> <li>• <i>Proposed board members will contribute a wide range of experience and expertise needed to oversee a successful charter school such as education, management, financial planning and community outreach</i></li> <li>• <i>Comprehensive plan for providing board training</i></li> <li>• <i>Clear description of selection and removal procedures, term limits, meeting schedules, and powers and roles of board members</i></li> <li>• <i>Clear distinction between the roles and responsibilities of the board members and school administrators</i></li> <li>• <i>Plan for meaningful involvement of parents and community members in the governance of the school</i></li> <li>• <i>Sufficient time, money and personnel allocated for planning and start-up prior to the school's opening</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(g) The projected enrollment to be maintained and the ages or grades to be served</p>	<p>Enrollment and ages/grades served is evidenced by a clear description of anticipated enrollment (by age/grade) for at least three years (and for the duration of the desired charter term, if longer than three years).</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>A complete description of the student population the school intends to serve</i></li> <li>• <i>Evidence of strong support from an adequate number of parents, or community members, or any combination thereof</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(h) The target population of students the public charter school will be designed to</p>	<p>The target population to be served is evidenced by a description of student demographics and characteristics.</p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
<p>serve</p>	<p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Evidence that founders understand key student populations and demographics within the district which are likely to influence the proposed school’s student body and needs</i></li> <li>• <i>Evidence of targeted student’s current levels of achievement and instructional needs</i></li> <li>• <i>Evidence of a need in the community to serve the target student population</i></li> <li>• <i>Evidence of sufficient interest in the school to fill the proposed number of student openings</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 150px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(i) A description of any distinctive learning or teaching techniques to be used in the public charter school</p>	<p>Distinctive learning and teaching techniques are evidenced by a detailed description of educational model(s), activities, and/or delivery strategies that will characterize the school.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Clear, focused and compelling</i></li> <li>• <i>Likely to improve educational outcomes</i></li> <li>• <i>Expresses a clear, guiding purpose aligned with the mission and vision</i></li> <li>• <i>Supported by research, applicant experience, and/or sound reasoning behind techniques</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 150px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(j) The legal address, facilities and physical location of the public charter school, if known</p>	<p>School’s address, if known, and legal/ mailing address.</p> <p><b>Preferable factors</b></p> <p><b><i>If a facility has been identified:</i></b></p> <ul style="list-style-type: none"> <li>• <i>Designation of the proposed facility</i></li> <li>• <i>Evidence the facility will be appropriate for the educational program of the school and adequate for the projected student enrollment</i></li> <li>• <i>Adequate reflection of the costs associated with the proposed facility in the budget, including rent, utilities, and maintenance</i></li> </ul>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
	<ul style="list-style-type: none"> <li>• Assurance the proposed facility will be in compliance with applicable building codes, health and safety laws, and with the requirements of the American with Disabilities Act (ADA)</li> <li>• Sound plan to identify needed renovation as well as the funds and timeline for the completion of those renovations</li> </ul> <p><b>If a facility has not yet been identified:</b></p> <ul style="list-style-type: none"> <li>• Description of anticipated facilities needs including evidence the facility will be appropriate for the educational program of the school and adequate for the projected student enrollment</li> <li>• Inclusion of costs associated with the anticipated facilities needs in the budget, including permits, rent, utilities, and maintenance</li> <li>• Evidence to indicate facilities-related budget assumptions are realistic based on anticipated location, size, etc</li> <li>• Assurance the proposed location will be in compliance with applicable building codes, health and safety laws, and with the requirements of the American with Disabilities Act (ADA)</li> <li>• Plan for finding a location, including a proposed schedule for doing so</li> </ul> <p> <input type="checkbox"/> <b>Meets</b>                                          <input type="checkbox"/> <b>Does Not Meet</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(k) A description of admission policies and application procedures</p>	<p>The admission policies and application procedures, including lottery procedures are evidenced by specific descriptions aligned with ORS Chapter 338.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• Clear description of the enrollment policy, including lottery procedures consistent with the requirements of ORS 338.125</li> <li>• Clear procedures for withdrawals and transfers from the school that will support an orderly transition for exiting students or a clear plan for developing such procedures</li> </ul> <p> <input type="checkbox"/> <b>Meets</b>                                          <input type="checkbox"/> <b>Does Not Meet</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
<p>(L) The statutes and rules that shall apply to the public charter school</p>	<p>Statutes and Rules that apply to the school are evidenced through an encompassing written statement of compliance with all laws listed as applicable to charter schools in ORS 338.115(1).</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Citation of any statutes or rules in addition to those listed in ORS 338.115 (1) and copies of policies or a timeline for policy development</i></li> </ul> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(m) The proposed budget and financial plan for the public charter school and evidence that the proposed budget and financial plan for the public charter school are financially sound</p>	<p>Demonstration of a sound budget and financial plan is evidenced by documentation of a detailed three-five year budget, accurate projection of revenues and expenditures based on prevailing costs and other factors that contribute to solvency.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Budget assumptions and financial planning based on realistic revenue and expenditure projections for the term of the contract, including based on minimum enrollment needed for solvency</i></li> <li>• <i>Spending priorities aligned with the school’s mission, curriculum, and plans for management, professional development, and growth</i></li> <li>• <i>Realistic cash flow projection for the first year of operation, including a plan for funding cash flow shortfalls</i></li> <li>• <i>Sound financial management systems</i></li> <li>• <i>Plan for making required school and employee contributions to PERS</i></li> <li>• <i>Adequate and reasonable plan to manage start-up costs</i></li> <li>• <i>Description of how the school will conduct an annual audit of the financial operations</i></li> </ul> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(n) A description of the financial management system for the public charter</p>	<p>The financial management systems are evidenced by documentation of board and staff management responsibilities, fiscal policies, budget development and oversight system,</p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
<p>school, an explanation of how the financial management system will meet the requirements of ORS 338.095 (1) and a plan for having the financial management system in place at the time the school begins operating;</p>	<p>creating and using budgets, balance sheets reflecting assets, expenditures and liabilities, accounting systems, payroll, insurance and benefits, financial reporting, internal controls (staffing policies and procedures), the audit (understanding, conducting and preparing for an audit and using 990s.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Clear description of the financial responsibilities of the charter board as it compares to the staff responsibilities</i></li> <li>• <i>A check and balance system described for budget development and the oversight system during the budget year</i></li> <li>• <i>Board policies describing the internal controls for receiving revenue and paying bills</i></li> <li>• <i>Clear operating standards for financial management with a consistent foundation, institutionalized practice in the event of leadership or staff turnover</i></li> <li>• <i>Processes reflecting annual review of such systems by both the public charter school and sponsor</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b>                                          <input type="checkbox"/> <b>Does Not Meet</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(o) The standards for behavior and the procedures for the discipline, suspension or expulsion of students</p>	<p>Clear description of standards for student behavior and accompanying discipline procedures, which include suspension and expulsion procedures.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Policies for addressing expulsion, suspension and education of expelled or suspended students providing adequate safety of students and staff; provide due process for students; serve the best interest of the school's students; create a positive environment for learning</i></li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>• <i>A description of student standards for behavior</i></li> <li>• <i>A clear plan for developing such policies including a schedule for doing so</i></li> <li>• <i>An explanation of how the proposed school will conduct appeals for students facing expulsion</i></li> <li>• <i>A description of how students will be expelled, for what offenses and which schools they will be expelled from if the expulsion hearing is conducted by the proposed charter</i></li> </ul>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
	<p><i>school</i></p> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(p) The proposed school calendar for the public charter school including length of school day and school year</p>	<p>The school calendar is evidenced by a description or calendaring of school days; the length of the school year and the length of a school day that meet the instructional time requirements in OAR 581-022-1620.</p> <p><b><i>Preferable factors</i></b></p> <ul style="list-style-type: none"> <li>• <i>School day and school calendar are structured in ways that align with the educational program</i></li> </ul> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(q) A description of the proposed staff members and required qualifications of teachers at the public charter school</p>	<p>All proposed staff positions and qualifications are described.</p> <p><b><i>Preferable factors</i></b></p> <ul style="list-style-type: none"> <li>• <i>Explanation of the relationship that will exist between the charter school and its employees</i></li> <li>• <i>Employment policies of the school OR clear plan for timely development of such policies</i></li> <li>• <i>Plans for ensuring all staff meet ESEA Highly Qualified Teachers requirements</i></li> <li>• <i>Staffing plan that clearly describes qualification, roles and responsibilities of each staff member, including school administrator</i></li> <li>• <i>Description of ongoing professional development for staff, aligned to school's mission</i></li> </ul> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(r) The date upon which the public charter school would begin operating</p>	<p>The operational date is evidenced by a clear statement of projected start date.</p> <p><b><i>Preferable factors</i></b></p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
	<ul style="list-style-type: none"> <li>• <i>A description of the process for opening the school on the projected start date</i></li> <li>• <i>A timeline outlining the significant items needed to open the school by the projected date.</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(s) The arrangements for any necessary special education and related services provided pursuant to ORS 338.165 for children with disabilities who may attend the public charter school</p>	<p>The arrangements for special education and related services are evidenced in a comprehensive description which aligns with ORS 338.165.</p> <p><b><i>Preferable factors</i></b></p> <ul style="list-style-type: none"> <li>• <i>Realistic plan to identify and meet the general education learning needs of, resident and non-resident students with disabilities</i></li> <li>• <i>Timeline, lead contact, and intervention process with specific action steps for meeting learning needs of students with suspected special needs</i></li> <li>• <i>Plans for serving special populations align with the overall curriculum, instructional approaches, and the school mission</i></li> <li>• <i>Plan for contracting with resident districts for providing Identification and IEP services for students with suspected or special needs.</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(t) Information on the manner in which community groups may be involved in the planning and development process of the public charter school</p>	<p>Plans to involve the community in the planning and development of the public charter school are described in detail (e.g., identification of key community groups or members the developers will access given the school’s mission and target population, tactics to engage key community constituents, the process of how community input will be sought, etc.).</p> <p><b><i>Preferable factors</i></b></p> <ul style="list-style-type: none"> <li>• <i>Sound outreach plan to inform parent and members of the community about the operations of the school, including providing information about the school to students of all races, languages, and abilities, a timeline for implementation, a lead contact, and specific action steps</i></li> </ul>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
	<ul style="list-style-type: none"> <li><i>Evidence the proposed school is welcomed by the larger community, has formed partnerships with community organizations, and is viewed as an attractive educational alternative that reflects the community's needs and interests</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(u) The term of the charter</p>	<p>The term of the charter is evidenced by a proposed beginning and ending date for the charter contract; proposed term must be a minimum of one year and maximum of five years.</p> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(v) The plan for performance bonding or insuring the public charter school, including buildings and liabilities</p>	<p>The insurance plan is evidenced through a description of the types and levels of insurance coverage the school plans to purchase or a description of the plan to secure performance bonding.</p> <p><b><i>Preferable factors</i></b></p> <ul style="list-style-type: none"> <li><i>Budget reflects insurance costs</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(w) A proposed plan for the placement of public charter school teachers, other school employees and students of the public charter school upon termination or non-renewal of a charter</p>	<p>The plan for placement of staff and students (in the event of non-renewal or termination) is evidenced through a written description of the process to be used; student plans should include collaboration with the local school district.</p> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(x) The manner in which the program review and fiscal audit will be conducted</p>	<p>The plans for annual review of educational program and operations, and municipal fiscal audits will be evidenced in a detailed description of how both will be accomplished</p>

<p><b>Proposal Requirements ORS 338.045 (2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
	<p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>The process and timeline for arranging the annual fiscal audit</i></li> <li>• <i>The process and timeline for a sponsor site visit</i></li> <li>• <i>The manner in which fiscal audit and program review results will be incorporated into school improvement planning</i></li> <li>• <i>The plan and timeline to submit audit and annual program review to ODE</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(y) In the case of an existing school being converted to charter status:</p> <p>(A) The alternative arrangements for students who choose not to attend the public charter school and for teachers and other school employees who choose not to participate in the public charter school; and</p> <p>(B) The relationship that will exist between the public charter school and its employees, including evidence that the terms and conditions of employment have been addressed with affected employees and their recognized representatives, if any.</p>	<p>(A) Alternative arrangements for staff or students who choose not to be in the public charter school is evidenced by a detailed plan that addresses the needs of each group and does not create an adverse impact or violate the rights of an individual.</p> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p> <p>(B) Description of the relationship between the public charter school and its employees, should they choose to remain at the school once converted to charter, with evidence that all employment terms and conditions have been addressed.</p> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Proposal Requirements ORS 338.045 (3)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
<p>(a) Additional information the school district board considers relevant to the formation or operation of the public charter school</p>	<p>Defined by school district board rubrics, evaluation documents, and/or policies.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Defined by school district board rubrics, evaluation documents, and/or policies.</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(b) Each member of a proposed public charter school governing body must provide an acknowledgement of understanding related to the standards of conduct and the liabilities of a director of a nonprofit organization, as those standards and liabilities are described in ORS chapter 65, if the public charter school is organized as required by ORS 338 035 (2)(a)(B) and (C)</p>	<p>List of charter school governing board directors is included with an acknowledgement of understanding signed by each director.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>The acknowledgement of understanding includes details related to the standards of conduct and liabilities.</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>

<p><b>Evaluation Criteria</b> <b>ORS 338.055(2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
<p>(a) The demonstrated, sustainable support for the public charter school by teachers, parents, students and other community members, including comments received at the public hearing held under subsection (1) of this section</p>	<p>Demonstration of sustainable support is evidenced by substantial documentation, e.g., market research, marketing plans, results of community meetings/presentations, community partnerships, and/or survey results, as well as documentation of community testimony provided during the public hearing conducted by the school district.</p> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(b) The demonstrated financial stability of the public charter school, including the demonstrated ability of the school to have a sound financial management system that is in place at the time the school begins operating and that meets the requirements of ORS 338.095 (1);</p>	<p>Demonstration of a fiscal stability is evidenced by documentation of a detailed three-five year budget, balance sheets reflecting assets, expenditures and liabilities, accurate projections of revenues and expenditures based on prevailing costs and other factors that contribute to solvency, as well as GAAP and other sound fiscal management practices.</p> <p><b><i>Preferable factors</i></b></p> <ul style="list-style-type: none"> <li>• <i>Annual reserve, minimal reliance on soft funds</i></li> <li>• <i>Sound financial management policies and strategies including but not limited to cash management, investment practices, financial reporting, segregation of duties, and processes reflecting annual review of such systems.</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b> <span style="margin-left: 200px;"><input type="checkbox"/> <b>Does Not Meet</b></span> </p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(c) The capability of the applicant, in terms of support and planning, to provide comprehensive instructional programs to students pursuant to an approved proposal</p>	<p>Evidence of the applicant’s capacity to support, plan and provide comprehensive instructional programs, including relevant expertise and experience of the applicant, a proposed comprehensive curriculum aligned with state standards and based on research-based instructional practices, adaptable for all achievement levels.</p> <p><b><i>Preferable factors</i></b></p> <ul style="list-style-type: none"> <li>• <i>Effective staffing, professional development</i></li> <li>• <i>Assessment plans that support effective delivery and</i></li> </ul>

<p><b>Evaluation Criteria</b> <b>ORS 338.055(2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
	<p><i>measurement of the instructional program.</i></p> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(d) The capability of the applicant, in terms of support and planning, to specifically provide, pursuant to an approved proposal, comprehensive instructional programs to students identified by the applicant as academically low achieving</p>	<p>Evidence of the applicant’s capability to support, plan, and provide comprehensive instructional programs that will meet the needs of academically low achieving students is evidenced by a plan for identifying low achieving students, specific program planning/ implementation to close anticipated achievement gaps and assessment plans to measure individual progress.</p> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(e) The extent to which the proposal addresses the information required in ORS 338.045</p>	<p>Evidence that the proposal addresses the information required in ORS 338.045 to a satisfactory extent.</p> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale for rating:</u></b></p>
<p>(f) Whether the value of the public charter school is outweighed by any directly identifiable, significant and adverse impact on the quality of the public education of students residing in the school district in which the public charter school will be located</p>	<p>Evidence from the proposal demonstrates the value of the public charter school.</p> <p>Evidence from the school district response demonstrates an explicitly identifiable, significant and adverse impact on the quality of education of students within the district.</p> <p><i>(A “Meets” score signifies there is NO adverse impact)</i></p> <p><input type="checkbox"/> <b>Meets</b>                      <input type="checkbox"/> <b>Does Not Meet</b></p> <p><b><u>Explain rationale of rating:</u></b></p> <p>Value-</p> <p>Adverse Impact-</p>



<p><b>Evaluation Criteria</b> <b>ORS 338.055(2)</b></p>	<p><b>Evidence, Preferable Factors, Rating and Rationale</b></p>
	<p>agencies and organizations, and has evidence of an effective governing board or structure to support the mission of the organization.</p> <p><b>Preferable factors</b></p> <ul style="list-style-type: none"> <li>• <i>Targeted student populations of organization show academic success or sustained growth as measured by valid and reliable assessment tools.</i></li> <li>• <i>Evaluation reports related to the organization, financial, operation, and/or implementation of any education services provided by the applicant show strong performance.</i></li> <li>• <i>The organization does not have debts in default.</i></li> </ul> <p> <input type="checkbox"/> <b>Meets</b>                                          <input type="checkbox"/> <b>Does Not Meet</b> </p> <p><b><u>Explain rationale for rating:</u></b></p>

## Proposal Process Checklist

This chart is intended for use by the Oregon Department of Education staff assigned to coordinate the appeal process. Staff will use this checklist to create a complete timeline of the process used by the district for specific charter school application. A determination will be made whether or not the process used by the district is deemed to meet the requirements in ORS 338 and OAR 581-026.

Process Requirement	Timeline Allowed	Actual Timeline	Description of Actions / Notes	Compliance
Applicant must submit proposal to the local school district board.	<i>May be defined by the local school district board.</i>			
School district board will determine whether the proposal addresses, at least minimally, all of the required components as set out in ORS 338.045(2) and (3). District must notify the applicant as to the completeness of the proposal.	Within 30 business days of the receipt of a proposal.			
If the proposal is deemed to be incomplete, the district must <u>identify specific elements that are not complete</u> and <u>provide a reasonable opportunity to complete the proposal</u> .	<i>Defined by the school district.</i>			

## Proposal Process Checklist

Process Requirement	Timeline Allowed	Actual Timeline	Description of Actions / Notes	Compliance
If an applicant does not provide a proposal that is complete within the reasonable opportunity as provided by district, the district may disapprove the proposal.	<i>Defined by the school district.</i>			
School district board must hold a public hearing on the proposal once the proposal is deemed complete.	Within 60 days after the notification to the applicant of the school district's receipt of a completed proposal or a final order issued remanding the proposal to the school district for consideration.			
School district board must evaluate the proposal in good faith using the criteria in ORS 338.055(2).	Within the period of time that the district receives a completed proposal and the school district board's decision.			
The school district board must either approve or deny the proposal and send written notice of the decision to the applicants.	Within 30 days of the public hearing.			
Written notice of a denial must include reasons and suggestions for remediation.	Within 30 days of the public hearing.			

## Proposal Process Checklist

Process Requirement	Timeline Allowed	Actual Timeline	Description of Actions / Notes	Compliance
Applicant may amend and resubmit the proposal to the school district board.	<i>May be defined by the school district.</i>			
Local school district board must approve or disapproved the resubmitted proposal.	Within 30 days of receipt of the resubmitted proposal.			
The school district board must evaluate the resubmitted proposal in good faith using the criteria in ORS 338.055(2).	Within 60 days of receiving a final order remanding the resubmitted proposal to the school district for reconsideration.			
The school district board must either approve or deny the resubmitted proposal and provide written notice to the applicants.	Within 60 days of receiving a final order remanding the resubmitted proposal to the school district for reconsideration.			
Written notice of a denial must include reasons and suggestions for remediation.	Within 60 days of receiving a final order remanding the resubmitted proposal to the school district for reconsideration.			