



START-UP CHARTER SCHOOL DETAILED IMPLEMENTATION PLAN

Application

Charter School Review Panel

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Legal Note §302B-1 "Detailed implementation plan" means the document that details the charter school's purpose, focus, operations, organization, finances, and accountability, and becomes the basis for a performance contract between the panel and the charter school.

I. Foundation of the Charter

A. Founding Group

Briefly describe the founding group for the proposed charter school which has become the Interim Local School Board (ILSB).

Explain the circumstances that brought the founding group together to form this charter school and its connection to the local community. Include resumes of the individuals and names of any organizations or agencies that are partners in planning and establishing the school, along with a description of the role they have played and any resources contributed by them. Note whether any member of the founding group is a proposed board member, school leader, or other "key" staff of the charter school.

Legal Note: §302B-5 Start-up charter schools; establishment.

(b) Any community, group of teachers, group of teachers and administrators, or nonprofit organization may submit a letter of intent to the office to form a charter school, establish an interim local school board as its governing body, and develop a detailed implementation plan pursuant to subsection (d).

§302B-7 Charter school local school boards; powers and duties. (a) All local school boards, with the exception of those of conversion charter schools that are managed and operated by a nonprofit organization pursuant to section 302B-6(e), shall be composed of, at a minimum, one representative from each of the following participant groups: (1) Principals; (2) Instructional staff members selected by the school instructional staff; (3) Support staff selected by the support staff of the school; (4) Parents of students attending the school selected by the parents of the school; (5) Student body representatives selected by the students of the school; and (6) The community at large. (b) No chief executive officer, chief administrative officer, executive director, or otherwise designated head of a school may serve as the chair of the local school board. (c) The local school board shall be the autonomous governing body of its charter school and shall be responsible for the financial and academic viability of the charter school, implementation of the charter, and the independent authority to determine the organization and management of the school, the curriculum, virtual education, and compliance with applicable federal and state laws. The local school board shall have the power to negotiate supplemental collective bargaining agreements with the exclusive representatives of their employees. (d) Local school boards shall be exempt from chapter 103D, but shall develop internal policies and procedures for the procurement of goods, services, and construction, consistent with the goals of public accountability and public procurement practices. Charter schools are encouraged to use the provisions of chapter 103D wherever possible; provided that the use of one or more provisions of chapter 103D shall not constitute a waiver of the exemption from chapter 103D and shall not subject the charter school to any other provision of chapter 103D.

Evaluation Criteria

Reviewers will look for substantial evidence that the founding group:

- Demonstrates the capacity to establish and sustain an excellent school;*
- Will manage public funds effectively and responsibly, or will secure necessary staff expertise for this purpose; and*
- Includes members who possess skill and experience in areas such as education, management, finance, and law, and/or will secure necessary staff expertise in these areas.*
- Established an ILSB consistent with the law.*



B. Mission Statement

The mission statement defines the core purpose and key values of the school and informs the public about the students the school intends to serve. It should be consistent with high academic standards and be meaningful, measurable, and free of jargon. A school's mission statement provides the foundation for the entire charter DIP and for the term of the school's charter. Therefore, the mission statement should be reflected throughout all sections of the Detailed Implementation Plan (DIP).

Reviewers will look for a clear and compelling mission statement that:

- Defines the purpose and values of the school;*
- Informs the public about the students the charter school intends to serve;*
- Is consistent with high academic standards and student success;*
- Is meaningful, measurable, and free of jargon; and*
- Is reflected throughout all sections of the DIP.*



C. Vision Statement

A vision statement should provide readers with an image of the future the applicant group wishes to create. The vision statement should articulate what the school will achieve for the community – students, parents, teachers, board members, and beyond. An effective vision statement aligns with the mission statement and is meaningful, measurable, and free of jargon.

Reviewers will look for a clear and compelling vision statement that:

- Illustrates a compelling image of the school's future;*
- Describes the ways in which the school will positively impact all stakeholders in the school;*
- Aligns with the mission statement; and*
- Is meaningful, measurable, and free of jargon.*



D. Statement of Need

In §302A-101, "charter schools" means public schools holding charters to operate as charter schools under chapter 302B, including start-up and conversion charter schools, that have the flexibility to implement alternative frameworks with regard to curriculum, facilities management, instructional approach, length of the school day, week, or year, and personnel management.

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Charter schools, in general, are to be established to stimulate the development of innovative programs within public education, to encourage performance-based educational programs, and to provide parents and students with greater options in school choice.

When describing the school's statement of need, applicant groups should: speak to the value of your school, based on its own merit; explain the need for this particular school in the community(ies) it will serve and how the community(ies) will benefit from the school; and describe the target student population the school will serve and the unique needs of this population.

Reviewers will look for a statement of need that:

- Provides compelling reasons why the proposed school is needed in the proposed area of service;*
- Describes how the school will have positive impacts on the proposed community(ies) it will serve;*
- Describes the students the charter school intends to serve and the targeted population's unique need;*
- Provides a specific rationale for how this school will enhance or expand the educational options currently available to the targeted student population;*



II. Educational Viability

A. Educational Philosophy

An educational philosophy defines the school's core values about teaching and learning. The educational philosophy should address the diverse needs of the student population. Moreover, it should be founded on an understanding of effective, research-based educational practices, teaching methods, and high standards for student learning.

When describing the school's educational philosophy, applicant groups should:

- ✓ Include in this description a discussion of the instructional methods to be used that support the educational philosophy.
- ✓ Describe how this educational philosophy aligns with the school's mission.
- ✓ Provide research on this educational philosophy and/or approach that demonstrates it will result in high academic achievement for the anticipated student population.

Reviewers will look for an educational philosophy that:

- Describes the instructional methods to be used in support of the educational philosophy;*
- Is integrated into the implementation of the comprehensive educational program;*
- Demonstrates that the philosophy serves the diverse needs of individual students;*
- Aligns with the school's mission;*
- Is founded on an understanding of effective, research-based educational practices, teaching methods, and high standards for student learning; and*
- Shows evidence that this approach will lead to improved student performance.*



B. Curriculum

Charter schools have the freedom to choose and/or develop curriculum models that best reflect the mission and educational philosophy of the school and that best serve the needs of the expected student population. Regardless of whether curriculum is purchased or internally developed, it is important that it aligns with the Hawaii Content and Performance Standards III.

When describing the school's curriculum, applicant groups should:

- ✓ Explain the process used to identify the curriculum that will be used by the school.
- ✓ Provide a description of the curriculum that will be used by the school, which aligns with HCPS III and addresses the benchmarks.
- ✓ Define what components, such as curriculum alignment templates, unit plans, etc., will be created as a part of the curriculum.
- ✓ Explain how English language learners, special education students, and students who enter the school below grade level will be engaged in and benefit from the curriculum.
- ✓ Describe the non-academic goals for students and how progress toward their attainment will be measured.
- ✓ Provide a rich, detailed sample unit plan to demonstrate an understanding of the curriculum model to be used. This must include skills to be taught in a core

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subject area: elementary, k - 6 schools should provide plans for k-3 and 4-6; for subsequent grades, provide one unit plan per grade level group i.e. middle (6-8), high school (9-12).

- ✓ Describe any other features of the school educational program which will aid reviewers in understanding the unique educational offerings of the school.

Reviewers will look for a curriculum plan that:

- Provides compelling reasons why the curriculum was chosen for the school;*
- Provides clear narrative of the curriculum with content and skills that are ambitious yet realistic for each grade or performance level;*
- Is research-based, engaging, and consistent with the mission of the school;*
- Defines curriculum components that will facilitate ongoing improvement and development of the curriculum;*
- Is aligned with the HCPS III;*
- Will be accessible and appropriate for all students at all levels, including English language learners, special education students, and students who enter below grade level; and*
- Includes non-academic goals (e.g. positive attitude toward learning) for students that are consistent with the stated mission, program, and educational philosophy of the school.*



C. School Characteristics

The school calendar, organization of students within the educational program, and the school culture/ethos are just a few of the elements that characterize a school. Your school's characteristics should be consistent with the proposed mission and educational philosophy and program.

When describing the school's characteristics, applicant groups should:

- ✓ Describe the culture or ethos that will be developed in the school and your plans to create and implement this culture/ethos.
- ✓ Provide a copy of the proposed school's calendar for its first year of operation that is compatible with the school's philosophy and provides sufficient time for students to meet HCPS III. Specify: a. the total number of days of instruction for the school year; b. the first and last day of classes; and c. all planned holidays and other days off, as well as planned half days.
- ✓ Provide a copy of the school's proposed weekly schedule, including: a. the total number of hours/minutes of instruction per week; b. the minimum number of hours the school will devote to core academic subjects in each grade, i.e. English language arts, mathematics, science, and social studies; c. the length of the school day (including the approximate start and dismissal times of the school day); and, d. a sample schedule.
- ✓ Provide a list of instructional staff positions for the school. The list should indicate and identify classroom teachers, and any teaching aides or assistants, as well as any specialty teachers. In addition, the list should identify the number of instructional personnel in each classroom, e.g., one teacher, one teaching assistant for each class and a plan for recruiting Highly Qualified Teachers.
- ✓ Describe how the school will prepare teachers, students, and parents for the first day of the school's operation.

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- ✓ Describe the implementation of the educational program in terms of the daily or weekly organization of students and faculty (e.g., multi-grade, tracking, team-teaching, etc.).
- ✓ Summarize, for illustrative purposes, a typical day from the perspective of a student in a grade level of your choice.
- ✓ Summarize, for illustrative purposes, a typical day from the perspective of a teacher of any subject or grade of your choice.
- ✓ Proposed Student Enrollment: Use the following format to submit student enrollment information for each year of the proposed charter term. The student enrollment information must include: a. the grades that the school would serve; b. the number of students to be served in each grade; c. the number of children expected in each class; and d. projected enrolled students for each year for five years.

	Number of Students				
Grades	Year 1	Year 2	Year 3	Year 4	Year 5
K					
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
Total Students					
# Classes per Grade					

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	Number of Students				
Ave. # Students per Class					

Reviewers will look for a description of school characteristics that:

- Provides a clear plan for establishing a school culture and norms consistent with the school's mission and educational program.*
- Include a thoughtful and academically rich school calendar and schedule for students and teachers;*
- Provide a clear plan that prepares teachers, students, and parents for the first day of school;*
- Describes how the school's educational program will be implemented for teachers and students;*
- Illustrates a typical student's day; and*
- Illustrates a typical teacher's day.*



D. Special Student Populations & Student Services

Describe your plan for providing students with disabilities and/or limited English proficiency access to the general education curriculum by implementing programs of special education and sheltered English immersion, and your plan for implementation of a student wellness program. Your response should not merely state the requirements of the laws, but how each program will be implemented at your particular school, given your particular educational program.

When describing the school's plan for special student populations and student services, applicant groups should:

- ✓ Describe how the school will ensure that adequate instructional support is available for all students and teachers, including reading instruction at the elementary level, remedial instruction, services for linguistic minority students, and consultative services for teachers.
- ✓ Describe how the school will identify, assess, and develop Individualized Education Plans (IEPs) for students who require special education.
- ✓ Describe how the school will comply with state and federal special education requirements for serving students with disabilities.
- ✓ Describe how special education services will be delivered within the school's daily schedule, the settings in which these services will be provided, the titles, salaries, and qualifications of the individuals delivering the services, and the methods they will use.
- ✓ Describe the services and supports that will be available through the school to students who are English language learners. Include a description of how services for English language learners will be delivered within the school's daily schedule, the settings in which these services will be provided.
- ✓ Describe your plan to provide a nutrition program at the school. Propose a way in which you plan to administer the free and reduced lunch program.
- ✓ Describe the school's plan for addressing student health needs.

Reviewers will look for:

- Student services that effectively identify, assess and serve special student populations;*
- Knowledge regarding program requirements and effective means of implementation;*
- Proposed staffing levels and program structure that support delivery of high quality services for all students; and*
- Evaluative procedures implemented by the school to ensure that the programs are effectively servicing the needs of the targeted student populations.*
- Statement of provision for student health care even if no health aide is present.*



E. Performance, Promotion, & Graduation Standards

When describing the school's performance, promotion and graduation standards, applicant groups should:

- ✓ Provide an example of performance standards for a grade grouping of your choice to indicate how students will be graded. Performance standards should indicate to teachers, parents, and students the attributes that merit a particular letter grade or rubric score.
- ✓ Describe the proposed school's policies and standards for promoting students to the next grade, achievement level, or grouping level.
- ✓ Provide examples of "exit standards" for the school's grade groupings (e.g. elementary, middle, high school or primary, upper elementary, etc.) in three areas: mathematics, English language arts and one other subject area of your choice. These exit standards should provide reviewers with a clear sense of what students will know and be able to do at the end of the last grade of each school level.

Reviewers will look for:

- Performance, promotion, and graduation standards that are specific, measurable, ambitious, yet attainable;*
- Performance standards for student assessment that are clear and easy to understand, not only for teachers and administrators, but also for parents and students;*
- Clear criteria for student promotion from one level to the next, and for graduation; and*
- Performance, promotion, and graduation standards based on high expectations and aligned with the school's mission, educational program, assessment system, and HCPS III.*



F. Assessment System

Charter schools are results-oriented educational institutions. The proposed DIP must define clear, understandable instructional and school goals. The application must describe how assessment is embedded in the learning process, describing a variety of assessments to measure student achievement (standardized tests, student portfolios, teacher observations, parent surveys, etc.). Set standards for ambitious and attainable

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educational results and explain how standards will drive curriculum decisions. All students are expected to make progress toward proficiency.

When describing the school's assessment system, applicant groups should:

- ✓ Describe how achievement data will be collected, used and reported.
- ✓ Indicate whether, in addition to administering the Hawaii Assessment System tests as required by state law, the school will use additional assessment tools to determine and report student progress.
- ✓ Describe which internal/school-developed instruments will be created in order to measure and report student progress. Explain why these particular assessments were selected for the targeted student population.
- ✓ Describe how assessment and achievement information will be reported. Indicate which audiences will receive this information and how often.
- ✓ Explain how assessment data will be used to plan staff development that will support the goal of improved student learning. Please be specific.

Reviewers will look for an assessment system that:

- Describes a clear process for the collection, use and reporting of data;*
- Includes descriptions and/or examples of assessments that are consistent with the school's mission, program, and high expectations of students, and that are based upon solid research;*
- Facilitates decision-making about necessary adjustments to the educational program and the staff development plan;*
- Describes multiple measures of student outcomes that can be reported to a variety of stakeholders;*
- Demonstrates a working knowledge of assessment that recognizes the need for a thorough, clear, measurable, externally credible, and conceptually sound design for measuring and reporting the performance and progress of the school as a whole and the academic and social development of each student to all relevant stakeholders;*



III. Operational Viability

A. Capacity

Local School Board (LSB) members are public agents authorized by the state and are responsible for governing charter schools. It is important that these individuals possess a wide variety of skills and qualifications that will enable them to found and sustain an excellent school.

When describing the capacity of the founding group and/or proposed ILSB, applicant groups should:

- ✓ Summarize each founder's and/or proposed board member's experience and qualifications briefly and provide evidence that the applicant(s) possess(es) the necessary background in the following areas critical to the charter school's success and/or that the founders have a plan to secure the services of

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- individuals who have the necessary background in these areas: Curriculum, instruction and assessment; Finance, facilities, and business management; and Organization, governance, and administration within the text of the document.
- ✓ Please attach a statement of commitment and resume for each founding group member and specify whether the individual is a proposed board member, proposed school leader, or proposed for any other positions. (Statements of commitment and resumes in the attachments are not counted toward the page limit.)
 - ✓ If the founding group includes the proposed school leader (or any other position at the school), indicate the process used to determine that the individual is the best candidate for the position.
 - ✓ If the applicant group is affiliated with an organization that manages a network of charter schools, provide a statement of the background and capacities of the organization in the above-mentioned areas.
 - ✓ Explain how often the group meets, how the planning and writing process is being executed, and identify who is the primary author of the Detailed Implementation Plan.

Reviewers will look for evidence that an applicant group:

- provides clear and compelling reasons the proposed charter school is being established;*
- has tangible ties to the communities the school will serve;*
- met regularly to plan and write a high quality DIP;*
- has the experience and qualifications necessary to implement the proposal;*
- demonstrates the capacity to found and sustain an excellent school;*
- can manage public funds effectively and responsibly;*
- includes members who possess skills and experience in areas such as education, management, finance, development, and law;*
- has broad and diverse representation from the communities the school will serve; and*
- administers an appropriate process to recruit and/or select a proposed school leader.*



B. School Governance

When describing the governance structure:

- ✓ Present an organizational chart and narrative. Be sure that the chart and narrative clarify the proposed reporting structure to the LSB and the relationship of the Board to the school's leader and administration regarding the governance and management of the school.
- ✓ Briefly describe the recruitment, selection, and development plans for board members.
- ✓ Briefly describe how the LSB will define conflict of interest.
- ✓ Briefly describe a initial policy for matters related to student discipline.

In addition, if your proposed school plans to contract with an education management organization (EMO):

- ✓ Provide an explanation of why the EMO was chosen.

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- ✓ Include a brief summary of the EMO's history, educational philosophy, and past academic and management results.
- ✓ Define the school's LSB relationship with the EMO and how the LSB will provide oversight to the EMO.
In addition, if you are filing the DIP together with a college, university, museum, educational institution or another not-for-profit entity, please provide the information below:
- ✓ Name of the partner organization;
- ✓ Name of the contact person at the partner organization with mailing address, facsimile number, and email address;
- ✓ A description of the nature and purpose of the school's partnerships with the organization; and
- ✓ How the partner organization will be involved in the governance of the school.

Evaluation Criteria – for all applicants

Reviewers will look for a practical governance model that:

- is consistent with the school's mission and program;*
- presents a clear and workable reporting structure to the LSB;*
- encourages an appropriate relationship between the LSB school leader, and administration regarding the governance and management of the school;*
- is consistent with public accountability and the charter school law;*
- clearly delineates the roles and responsibilities of the Board and the school staff;*
- defines conflict of interest and describes an initial policy for disciplining students;*
- establishes viable processes for policy making and ongoing Board development; and*
- establishes a viable process for recruiting and selecting additional board members.*



Additional Evaluation Criteria – for applicants intending to contract with an EMO

Reviewers will look for:

- a compelling reason why the founding group has chosen the proposed EMO;*
- alignment between the EMO's history and educational philosophy and the proposed charter school's mission, vision, and educational philosophy;*
- a clear delineation between the roles and responsibilities of the school's Board and the EMO; and*
- a clear, defined, and appropriate structure for the LSB to provide oversight to the EMO.*

Additional Evaluation Criteria – for applicants filing the DIP together with a college, university, museum, educational institution or another not-for-profit entity.

Reviewers will look for:

- a relationship that enhances, complements, and/or supports the mission and educational philosophy of the proposed charter school.*

C. Enrollment and Recruitment

Charter schools are public schools and are therefore open to all students. This means that a charter school may not discriminate on the basis of race, color, national origin, sex, disability when recruiting or admitting students. Moreover, a charter school may not

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set admissions criteria that are intended to discriminate or that have the effect of discriminating based upon any of these characteristics.

When preparing the enrollment and recruitment section of the DIP:

- ✓ Provide a description of how the founding group has assessed parental demand within the proposed sending region for the proposed school.
- ✓ Describe how the school will publicize its program to a broad cross-section of prospective students throughout the area that the school plans to serve.
- ✓ Describe the proposed application and enrollment process, including a plan for a lottery.

Reviewers will look for:

- a specific rationale for a viable and sustainable size and growth strategy;*
- evidence of a significant demand among parents for the proposed school;*
- a continuing plan for aggressive and broad outreach and recruitment, including to families that may be less informed about options;*
- a student admissions plan that ensures adequate enrollment and full accessibility of the school to all eligible students; and*
- a proposed enrollment process that is open, fair, and in accordance with the charter school statute and regulations.*



D. Management

(1) Management Structure

- ✓ Describe the proposed organizational structure of all administrative positions and teachers.
- ✓ Describe how the school will make key organizational decisions about curriculum and instruction, student achievement, fiscal planning, and operations.

(2) Roles and Responsibilities

- ✓ Describe the roles and responsibilities of the school's leader and other administrative staff.
- ✓ Articulate key role distinctions with regard to student achievement, personnel, financial management, and operations.

(3) Policy Development

- ✓ Please describe one policy that the ILSB has established and the process for developing that policy.

(4) Educational Leadership

- ✓ Describe the proposed process for the development, supervision, coordination, and continual assessment of the educational content and pedagogical approach of the school.

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- ✓ Explain how the operations of the school will be continually aligned to support instructional goals and student achievement.
- ✓ Describe how the principal or instructional leader will use student assessment data to improve instruction to lead to increased student achievement.
- ✓ Explain how student assessment data will be used to plan staff development that will support the goal of improved student achievement.

(5) Human Resources

- ✓ Indicate the number of faculty to be hired. Explain the process of determining job positions, roles, and responsibilities.
- ✓ Describe the school's plan for staff recruitment, advancement, and retention.
- ✓ Describe how the faculty and administrators will be evaluated.
- ✓ Describe plans for teachers, administrators, and other school staff to engage in professional development activities.
- ✓ Describe the qualifications and attributes of an ideal teacher for the proposed school.
- ✓ Describe briefly the teaching program of typical teachers. Indicate how many hours they will be in class and what other school-related responsibilities they will have outside the classroom (lunch duty, dismissal advisory group, after school).
- ✓ Describe anticipated employee rights and management issues and a framework for addressing those issues that protect the rights of employees.

Reviewers will look for a management system that includes:

- a clear reporting structure and solid plan for making key school-level decisions on student achievement, fiscal planning and operations;*
- clearly delineated roles and responsibilities for the school's leader and other administrative staff;*
- professional development opportunities for faculty and administrators;*
- a clear plan for evaluating and revising the curriculum;*
- a well-articulated plan for using student assessment data to improve instruction;*
- a staffing plan, hiring criteria, and evaluation procedures that are clear and aligned with the school's mission; and*
- working conditions that will retain high quality staff.*



E. Facilities

When describing plans for school facilities:

- ✓ Describe the process for identifying viable options for a facility for this school and any sites already identified. Explain why these sites were chosen as possibilities. If a specific facility has not been determined, describe the applicant group's plan for identifying possible locations, choosing one, securing all necessary approvals for use of the facility as a charter school, and securing financing.
- ✓ Describe how you plan to meet all safety and building requirements as required by state and county law for use of the facility as a charter school.
- ✓ If possible, provide a layout and description of the proposed charter school facility. Include the number and size of classrooms, common areas, and recreational space.
- ✓ Describe the financing plans and proposed budget for acquisition (purchase, lease, etc.) of a facility and any necessary renovations to it to meet the school's needs.

Reviewers will look for evidence that there is:

- a process for conducting a facility search and viable options for an adequate school facility in the proposed area of service;*
- plausible plan for obtaining and financing adequate space in time for an orderly opening and operation of the school;*
- a proposed facility that will serve all eligible students and is consistent with charter school statute and regulations; and*
- sound financing options.*



IV Financial Viability

(1) Fiscal Management

- ✓ Explain who will manage the school's finances.
- ✓ Describe the fiscal controls and financial management policies the LSB will employ to remain informed of the school's financial position.
- ✓ Describe how the school will track finances in its daily business operations in order to maintain needed cash flow.
- ✓ Describe the systems and processes by which the school will keep track of financial data and compile information for the annual statement of income and expenditures for the prior fiscal year.
- ✓ Describe how the school will acquire and finance necessary insurance of the types and in the amounts required for an enterprise of similar purpose and circumstance, and provide evidence that the cost and availability of such insurance has been researched by the applicants.
- ✓ Describe the structure for providing business/administrative services (including, at a minimum, personnel transactions, accounting, and payroll) that reflects an understanding of school business practices and expertise needed to carry out administrative services or a reasonable plan and timeline to develop and assemble such practices and expertise. For any contract services planned to serve the school, describe the criteria and procedures for the selection of contractors.
- ✓ Describe the manner in which annual, independent financial audits will be completed following the close of each fiscal year, and the anticipated timeline in which audit exceptions and deficiencies (if any) will be resolved to the satisfaction of the charter authorizer.
- ✓ Describe who will be responsible for contracting and overseeing the independent audit, including a specification that the auditor will have experience in education finance. Outline, as applicable, the process for providing audit reports to the charter authorizer.

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(2) Budget

- ✓ Provide a proposed first-year operational budget, including startup costs, that includes: reasonable estimates of all anticipated revenues and expenditures necessary to operate the school – including special education; and budget notes that clearly describe assumptions or revenue estimates, including, but not limited to the basis for average daily attendance estimates and staffing levels.
- ✓ Provide a complete five year budget for the charter school's first four years of operation with children and its initial planning year(s). Base the projections upon the most accurate estimates available at the time of application consistent with the narrations that describe the assumptions and operations of the proposed school.
- ✓ Provide expenditure estimates that would minimally include:
 - ❖ personnel costs including benefits, wages and salaries, and taxes
 - ❖ building costs including lease expenditures, maintenance, and utilities
 - ❖ curricular and extracurricular expenditures including books and supplies, field trips and technology
 - ❖ governance, advertising and promotion costs
 - ❖ food service and community service expenditures
 - ❖ all other costs including additional insurance, capital purchases and leases, development costs, contracted services and support services including guidance, counseling and health services.
 - ❖ a detailed set of descriptions and costs for all contracted services including, but not limited to, those costs associated with maintenance companies, education service providers, auditors.
- ✓ Include a budget narrative that provides a rationale for items listed in the budget.

Reviewers will look for a:

- fiscal management system that establishes channels of communication; is appropriate, efficient, and follows generally accepted accounting principles; safeguards assets.*
- budget that reflects accurate revenue and expenditure estimates*
- clear understanding of the financial demands of running a school*
- viable plan for attaining the school's objectives with the funds that will be available*
- budget that reflects the unique qualities of the school.*



APPENDIX A: Establishing Start-up Charter Schools

§302B-5 Start-up charter schools; establishment.

- (a) *New start-up charter schools may be established pursuant to this section.*
- (b) *Any community, group of teachers, group of teachers and administrators, or nonprofit organization may submit a letter of intent to the office to form a charter school, establish an interim local school board as its governing body, and develop a detailed implementation plan pursuant to subsection (d).*
- (c) *The start-up charter school application process and schedule shall be determined by the panel, and shall provide for and include the following elements:*
 - (1) *The submission of a letter of intent to operate a start-up charter school;*
 - (2) *The timely transmittal of the application form and completion guidelines to the interim local school board;*
 - (3) *The timely submission to the panel of a completed application;*
 - (4) *The timely review of the application by the panel for completeness, and notification of the interim local school board if the application is complete or, if the application is insufficient, a written statement of the elements of the application that require completion;*
 - (5) *The timely resubmission of the application;*
 - (6) *Upon receipt of a completed application, the convening of the panel by the panel chairperson to begin review of the application;*
 - (7) *The timely notification of the applicant of any revisions the panel requests as necessary for a recommendation of approval;*
 - (8) *Following the submission of an application, issuance of a charter or denial of the application by the panel by majority vote; provided that if the panel does not approve the application and issue a charter, provisions requiring the panel to:*
 - (A) *Clearly identify in writing its reasons for not issuing the charter, which may be used as guidelines for an amended plan; and*
 - (B) *Allow the interim local school board to revise its plan in accordance with the panel's guidelines, and resubmit an amended plan within ten calendar days;*
 - (9) *A provision for a final date on which a decision must be made, upon receipt of an amended plan; and*
 - (10) *A provision that no start-up charter school may begin operation before obtaining panel approval of its charter.*
- (d) *An application to become a start-up charter school shall include a detailed implementation plan that meets the requirements of this subsection and section 302B-9. The plan shall include the following:*
 - (1) *A description of employee rights and management issues and a framework for addressing those issues that protects the rights of employees;*
 - (2) *A plan for identifying, recruiting, and retaining highly-qualified instructional faculty;*
 - (3) *A plan for identifying, recruiting, and selecting students that is not exclusive, elitist, or segregationist;*
 - (4) *The curriculum and instructional framework to be used to achieve student outcomes, including an assessment plan;*
 - (5) *A plan for the assessment of student, administrative support, and teaching personnel performance that:*
 - (A) *Recognizes the interests of the general public;*
 - (B) *Incorporates or exceeds the educational content and performance standards developed by the department for the public school system;*
 - (C) *Includes a system of faculty and staff accountability that holds faculty and staff both individually and collectively accountable for their performance, and that is at least equivalent to the average system of accountability in public schools throughout the State; and*
 - (D) *Provides for program audits and annual financial audits;*
 - (6) *A governance structure for the charter school that incorporates a conflict of interest policy and a plan for periodic training to carry out the duties of local school board members;*
 - (7) *A financial plan based on the most recent fiscal year's per-pupil charter school allocation that demonstrates the ability to meet the financial obligations of one-time, start-up costs and ongoing costs such as monthly payrolls, faculty recruitment, professional development, and facilities costs; and*
 - (8) *A facilities plan. [L 2006, c 298, pt of §2; am L 2007, c 115, §9]*

APPENDIX B: DIP Start-up Charter School Application Timeline

Authority: The powers and duties of the panel shall be to:

- (2) Review, approve, or deny charter applications for new charter schools in accordance with [section] 302B-5 for the issuance of new charters; provided that applicants that are denied a charter may appeal to the board for a final decision pursuant to section 302B-3.5;

§302B-5 (c) The start-up charter school application process and schedule shall be determined by the panel...

Application/Authority	Submit To	Deadline
Stage 1: Submission Letter of intent	CSRP Executive Assistant with Copy to CSAO	Dec. 1st Year 1, Month 1
Stage 2: Development and Approval of the DIP by the ILSB	ILSB	
Stage 3: Submission of DIP	CSRP Executive Assistant with Copy to CSAO	February 15th Year 1, Month 3.5
Stage 4: CSRP Application committee review for completeness and eligibility and notification of the interim Local School Board	ILSB	March 15 Year 1. Month 4.5
Stage 5: Resubmission of DIP if needed	CSRP Executive Assistant with Copy to CSAO	April 1st Year 1, Month 5
Stage 6: Review of Detailed Implementation Plan and Interview of Applicant Group	Panel	June 1st Year 1, Month 7
Stage 7: Return to ILSB for requested revisions	ILSB	June 10th Year 1, Month 7.5
Stage 8: Submission of Revised DIP	CSRP Executive Assistant with Copy to CSAO	July 10th Year 1, Month 8

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Application/Authority	Submit To	Deadline
Stage 9: Review of Revised DIPs	Panel	September 10th Year 1, Month 10
Stage 10: Issue or Deny Charter with written reasons for the decision	ILSB	September 25th Year 1, Month 10
Stage 11: Submission of Revised DIP (10 calendar days)	CSRP Executive Assistant with Copy to CSAO	October 10th Year 1, Month 11
Stage 12: Review of Revised DIPs	Panel	November 15th Year 1, Month 12
Stage 13: Decision and Notification of denial or approval to ILSB	Panel	November 20th Year 1, Month 12
Stage 14: Appeal Process (File within 21 calendar days of receipt of denial)	BOE	Before or on December 11th Year 2, Month 1
Stage 15: BOE Review of Appealed DIP (60 calendar days)	BOE	February 11th Year 2, Month 3
Stage 16: Final Panel Decision	Panel	March 1st Year 2, Month 4

[§302B-3.5] Appeals; charter school applications, revocations, or detailed implementation plan amendments. The board shall have the power to decide appeals from decisions of the panel to deny the approval of a charter school application, revoke a charter school's charter, or deny the approval of an amendment to a charter school's detailed implementation plan. An appeal shall be filed with the board within twenty-one calendar days of the receipt of the notification of denial or revocation. Only a party whose charter school application has been denied, whose charter has been revoked, or whose amendment to a detailed implementation plan has been denied may initiate an appeal under this section for cause. The board shall review an appeal and issue a final decision within sixty calendar days of the filing of the appeal. The board may adopt applicable rules and procedures pursuant to chapter 91 for implementing the appeals process. [L 2007, c 115, §2]

APPENDIX C: Guidelines

NEW START-UP DIP APPLICANTS

Stage 1: Submission of Letter of Intent

Letter of intent will be accepted beginning on December 1, 2008. The letter should be submitted to the CSRPH Executive Assistant and the Charter School Administrative Office. The letter of intent can be submitted either via regular or electronic mail return receipt requested.

CSRPH Executive Assistant – csrph.hi@gmail.com

CSAO
1111 Bishop Street, Suite 516
Honolulu, Hawaii 96813

Legal Note HRS Section 302B-5 (b) any community, group of teachers and administrators, or nonprofit organization may submit a letter of intent to the CSAO office to form a charter school, establish an interim local school board as its governing body, and develop a detailed implementation plan pursuant to subsection (d).

Legal Note HRS Section 302B-5 (c)(1) requires a submission of a letter to operate a start-up charter school.

Stage 2: Development and Approval of the DIP by the Interim Local School Board

All parties that have submitted a letter of intent by the deadline of December 1st will then receive a Detailed Implementation Plan (DIP) application and guidelines. These documents can also be found online at the CSRPH website (<http://www.csrphi.org/home.htm>).

Stage 3: Submission of DIP to the Panel via CSRPH Executive Assistant and CSAO

Guidelines for Submission of a Detailed Implementation Plan

- Detailed Implementation Plans (DIP) may be a maximum of sixty (60) pages including ALL appendices. “Pages” are defined as 8.5” x 11.0” with one inch margins on all four sides. Print is to be no less than 12 point.
- We recommend that abbreviated resumes and concise summaries be used where ever possible.
- Applicants are encouraged to avoid overly broad or general statements concerning “quality education” and “nurturing environments” unless these terms are clearly defined and connected to the rest of the Plan.
- DIP should include your completed DIP Cover Sheet and Assurances.

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- DIP should include a one-line footer with the full name of the proposed charter school and a page number on every page.
- The Review Panel requires fourteen (14) paper copies of the Detailed Implementation Plan and one electronic copy in pdf or doc format to be mailed to the CSRP Executive Assistant at csrp.hi@gmail.com.
- Submission is considered to have taken place when one fully signed paper copy is delivered to the Chairperson of the Panel at the CSAO address.
- DIPs received on or before 4:00 pm on February 15, 2009 will be given priority status. Plans received all or in part after 4:00 pm on February 16, 2009 may be reviewed if charters remain available.
- The receipt of all DIPs will be confirmed by mail sent to the interim local school board chair.
- DIPs that are received within the timeframes specified for the acceptance of new applications will move to the next stage in the application review and decision process.

Legal Note HRS Section 302B-5 (d) An application to become a start-up charter school shall include a detailed implementation plan that meets the requirements of this subsection and section 302B-9. The plan shall include the following:

- 1) *A description of employee rights and management issues and a framework for addressing those issues that protects the rights of employees;*
- 2) *A plan for identifying, recruiting, and retaining highly-qualified instructional faculty;*
- 3) *A plan for identifying, recruiting, and selecting students that is not exclusive, elitist or segregationist;*
- 4) *The curriculum and instructional framework to be used to achieve student outcomes, including an assessment plan*
- 5) *A plan for the assessment of student, administrative support, and teaching personnel performance that:*
 - a. *Recognizes the interests of the general public*
 - b. *Incorporates or exceeds the educational content and performance standards developed by the department for the public school system;*
 - c. *Includes a system of faculty and staff accountability that holds faculty and staff both individually and collectively accountable for their performance, and that is at least equivalent to the average system of accountability in public schools throughout the state; and*
 - d. *Provides for program audits and annual financial audits.*
- 6) *A governance structure for the charter school that incorporates a conflict of interest policy and a plan for periodic training to carry out the duties of the local school board members;*
- 7) *A financial plan based on the most recent fiscal year's per-pupil charter school allocation that demonstrates the ability to meet the financial obligations of one-time, start-up costs and ongoing costs such as monthly payrolls, faculty recruitment, professional development, and facilities costs; and*
- 8) *A facilities plan.*

Note: The review and decision process will take place annually dependent upon the number of available charters. Interim local school board chairs will be notified by mail of Panel action on pending DIPs.

Stage 4: CSRP Application committee review for completeness and eligibility and notification of the interim Local School Board

Each application will be reviewed by at least two panel members from the Application committee of the CSRP for the determination of completeness and eligibility.

Recommendation to review DIP or return to applicant for completion and/or eligibility check is made to the full panel.

The Panel will notify interim ILSB concerning completeness and eligibility or elements that require completion by March 15, 2009.

If a DIP is incomplete or found to be ineligible, a written notification will be sent to the ILSB Chair through the mail with return receipt requested (RRR). A written statement of the elements of the application that require completion will be provided in the notification.

DIPs that meet the requirements and are therefore determined to be complete will move on to the next stage of the application review process.

Legal Note: HRS Section 302B-5 (c) (4) requires a timely review of the application by the panel for completeness, and notification of the ILSB if the application is complete or, if the application is insufficient, a written statement of the elements of the application that require completion.

Stage 5: Resubmission of the DIP

If the Detailed Implementation Plan was in need of completion, corrections will be made by the submitting party and resubmitted to the CSRP Executive Assistant and the CSAO by April 1, 2009.

Legal Note: HRS Section 302B-5 (c) (5) the timely resubmission of the application.

Stage 6: Review of Detailed Implementation Plan and Interview of Applicant Group

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There will be 8-12 members involved in the deliberation and decision process. These members will remain consistent throughout the process.

Each member will:

- Participate in the orientation and training of the use of the Scoring Rubric and/or other tools to be used;
- Review all of the DIPs independently against the Scoring Rubric, record scores for each category and a total score for each DIP, and provide specific comments;
- Bring a copy of the individual scores to the meeting at which the deliberations will occur;
- Share the individual scores and participate in the discussion to arrive at consensus scores for each DIP.

The Chairperson will be responsible to:

- Ensure that each member has received training on the Scoring Rubric and/or other tools to be used;
- Convene the panel members for deliberation;
- Facilitate the deliberations which results in consensus scores for each DIP; and
- Communicate the official results to the CSAO, interim local school board chairs and the BOE.

Conflict of Interest: The panel shall fully review all DIPs received on a timely basis in a fair and objective manner. In cases of potential or actual conflicts of interest, the panel member is expected to reveal the potential or actual conflict and remove him/herself from a decision-making authority with respect to any conflict situation involving the DIPs.

The panel members participating in the deliberation and decision process shall have knowledge in one or more of the following areas related to the DIPs;

- Curriculum and instruction
- Business and fiscal management
- School governance, organization and management
- Operation of a charter school
- Family and community participation
- Assessment and accountability

Other non-voting consultants may be involved in the discussions to provide additional guidance to the panel members as necessary.

Scoring Considerations: The scoring shall consist of four categories weighted as indicated:

1. Foundation of the Charter (20%)
2. Educational Viability (30%)
3. Operational Viability (30%)
4. Financial Viability (20%)

START-UP CHARTER SCHOOL DETAILED IMPLEMENTATION PLAN
Application

The panel shall use the criteria published in START-UP CHARTER SCHOOL DETAILED IMPLEMENTATION PLAN.

Scoring Procedures: Each DIP will be reviewed by individual CSR members independently before convening as a panel.

An acceptable score for each category:

- Foundation of the Charter 16 of 20 points
- Educational Viability 24 of 30 points
- Operational Viability 24 of 30 points
- Financial Viability 16 of 20 points
- Total 80 of 100 points

Although a DIP might earn 80 or more points overall but fails to receive the minimum number of points in one or more of the categories, the DIP does not meet the minimum standards.

Once individual scores are completed, the panel members will convene to deliberate by sharing individual scores for each category and the total score for each DIP.

The panel will review applications in order of receipt. All applications will be reviewed before any decisions are made.

The deliberations will result in a consensus score for each of the categories and a total score for each DIP. The deliberations will also result in one of three outcomes for each applicant:

1. The approval of a charter
2. The denial of a charter, or
3. The request for amendments to be made.

If the number of DIPs exceeds the number of charters allowable, the panel will prioritize the applicants by the total score earned with the highest score as the first priority, the second highest score as the second, and so forth. The awarding of a charter will be provided in order of priority until the number of allowable charters is exhausted.

Approval will be granted to an application that:

- Holds exceptional promise;
- Receives high reviewer ratings (80% or better) in all categories;
- Fully meets the requirements;
- Is ready immediately to gear up to offer instructional services; and
- Earned a total score of at least 80 (out of 100) with no less than 80% in any category.

The CSR Executive Assistant will schedule interviews with the full panel to run concurrently with DIP review. Each DIP applicant will be asked to address the four categories in the DIP and answer questions posed by panel members. Interviews will occur in a consistent manner with the order that DIPs were received.

START-UP CHARTER SCHOOL DETAILED IMPLEMENTATION PLAN
Application

Review of Detailed Implementation Plans and Interviews will take place by June 1, 2009.

Legal Note; HRS 302B-5 (c)(6) Upon receipt of a completed application, the convening of the panel by the panel chairperson to begin review of the application.

Stage 7: Return to ILSB for requested revisions

If the panel does not approve the application and issue a charter, the panel will clearly identify in writing its reasons for not issuing the charter, which may be used as guidelines for an amended plan. The ILSB will be notified in writing by July 10, 2009.

Legal Note: HRS 302B-5 (c)(7) The timely notification of the applicant of any revisions the panel requests as necessary for a recommendation of approval.

Stage 8: Submission of Revised DIP

The applicant party should submit the revised DIP to the CSRP Executive Assistant and the CSAO by July 10, 2009.

Stage 9: Review of revised DIP

The panel will follow the steps described in Stage 6 with the *exception of the interview process*. Revised DIPs will be reviewed by the full panel by September 10, 2009.

Stage 10: Issue or deny charter with written reasons for the decision

The panel will notify the ILSB of approval or denial with written reasons for the decision by September 25, 2009.

Legal Note: HRS 302B-5 (c)(8) Following the submission of an application; issuance of a charter or denial of the application by the panel by majority vote; provided that if the panel does not approve the application and issue a charter, provisions requiring the panel to: (A) clearly identify in writing its reasons for not issuing the charter, which may be used as guidelines for an amended plan

See Stage 7

Stage 11: Submission of Revised DIP

Revised DIPs should be received by the CSRP Executive Assistant and the CSAO by October 10, 2009.

Stage 12: Review of Second Revision of DIP

The panel will follow the steps described in Stage 6 with *the exception of the interview process*. Revised DIPs will be reviewed by the panel by November 15, 2009.

Stage 13: Decision and Notification of denial/approval to ILSB

Final decisions concerning granting of charters will be made by the full panel by November 20, 2009.

The Chair of the ILSB for all DIPs will be notified in writing of their approval or denial of a charter.

Stage 14: Appeal Process

Should the applicant desire to complete the appeal process, the applicant must begin the process by December 11, 2009. The panel will forward all information to the Board of Education.

The Panel Chair will provide for the Board of Education the 'entire file' which contains the required documents:

- The grounds for the decision by the Panel; and
- Any written correspondence, documents, or reports considered by the Panel in the decision.

Legal Note: HRS 302B-3.5 The board shall have the power to decide appeals from decision of the panel to deny the approval of a charter school application, revoke a charter school's charter, or deny the approval of an amendment to a charter school's detailed implementation plan. An appeal shall be filed with the board within twenty-one calendar days of the receipt of the notification of denial. Only a party whose charter school application has been denied, whose charter has been revoked, or whose amendment to a detailed implementation plan has been denied may initiate an appeal under this section for cause. The board shall review an appeal and issue a final decision within sixty calendar days of the filing of the appeal. The board may adopt applicable rules and procedures pursuant to chapter 91 for implementing the appeals process.

Stage 15: BOE Review of Appealed DIP

The Board of Education will have sixty calendar days to review the appeal. Appeals will be reviewed by February 11, 2010.

*Legal Note: HRS 302B-3.5 ******

Stage 16: Final Panel Decision

START-UP CHARTER SCHOOL DETAILED IMPLEMENTATION PLAN
Application

No charters will be issued until the appeals process has been completed. All final decisions will be made in writing to each applicant's ILSB by March 1, 2010.

Legal Note: HRS 302B-5 (c)(9) – A provision for a final date on which a decision must be made, upon receipt of an amended plan.

