



*Investment Partner in Renaissance 2010*

2009 New Ventures in Education Seminar Series:  
**Key School Application Components**



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Raza Fund Development

April 16, 2009

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## **The executive summary should provide a tight and compelling vision for your school**

- ▶ A Stand Alone Document
- ▶ Comprehensive but Concise
- ▶ No More than 5 Pages
- ▶ A Vision and a Plan But Not a philosophy
- ▶ Clear About The Compelling Need for the School and Why / How it Will Offer Better Educational Opportunities Than Presently Available
- ▶ Cliff's Notes For The Reviewers

## **Define the targeted student population**

- ▶ If Targeting a Geographical Locale, Determine Likely Composition of Student Population by Gathering Demographic and Student Achievement Data
- ▶ If Geographical Target Area is Unknown, Be Clear About Types of Students the School is Intended to Serve
- ▶ Determine Grade Levels to Be Served and Rationale for Choice

## **Sequencing Planning: targeted student population and grades drive key planning considerations**

- ▶ Academic Goals, the Educational Program, Remediation Needs, School Calendar and Additional Programs and Supports
- ▶ Growth Plan for the School (and Determining Financial Trade Offs)
- ▶ Culture and Values Building; Code of Conduct
- ▶ Student Recruitment and Marketing
- ▶ Staffing Chart
- ▶ Qualifications Sought in Teachers and Other Faculty (Which Should Be Defined in Job Descriptions)
- ▶ Recruiting Strategy (and Targeted Hiring and Starting Dates)
- ▶ Starting Dates for Teachers and Staff and Pre-Opening Staff Training and Development

## **Academic and operational goals should be measurable and reflect high but realistic expectations**

- ▶ SMART – Specific, Measurable, Attainable, Reflect Mission and Time Specific
- ▶ Reflect High Expectations But Be Realistic – Reflect an Understanding of Needs of Likely Students
- ▶ Longer-Term Goals and Back-Planned into Shorter-Term Benchmarks – for Achieving High Academic Achievement and Business / Financial Stability

## **An educational program description should be explicit about the following seven programmatic components**

- ▶ Growing / Rolling Out the School; Rationale for Beginning and Final Grade Levels and Enrollment
- ▶ The Components of the School Model, the Best Practices it Incorporates, Research Base, Evidence that it Will Work for Targeted Population
- ▶ Curriculum, Textbooks, Use of Technology for Instruction, and Assessment (Use of Data)
- ▶ Plans for Remediation and Serving Students with Special Needs
- ▶ School Calendar, Length of School Year and School Day, Instructional Time Devoted to Core Subjects, and Student Supports
- ▶ Promotion and Graduation Requirements
- ▶ Professional Development Plan / Schedule

## **An educational program description should avoid jargon and loose references to academic concepts**

- ▶ Overuse of Educational Jargon
- ▶ Assuming Reviewers are Experts about Various Instructional Programs and Methodologies
- ▶ Describing School Components or Activities That Are Not Reflected in Budgets
- ▶ General References to Differentiating Instruction. When and How Will Instruction Be Differentiated
- ▶ Ask Yourself? When and How Will Instruction Be Differentiated? Does Your School Application Clearly Indicate How You Will Recruit and/or Train Teachers With the Skills Sets to Differentiate Instruction? Is Your Faculty Recruitment Plan Adequate? Do you have to go back and reconsider any aspect of your school plan?

## **The educational program should include descriptions of “A Day in the Life of a Student”**

- ▶ Describing a Day in the Life of a Low Performing, a High Performing, and a Student with Special Learning Needs or Styles Can Enhance Planning and Strengthen an Application.
- ▶ Descriptions of No More Than Two Pages Breathe Life Into an Application

## **Assessment and use of data plans should incorporate a full evaluative system, not just a test schedule**

- ▶ *Formative Evaluations* – to Determine Student Learning Needs and Inform Instruction
- ▶ *Summative Evaluations* – to Measure the Status and Growth of Student Achievement, and to Evaluate Attainment of Academic Benchmarks and Goals
- ▶ A Clear Method for Establishing Performance Baselines and Measuring Longitudinal Progress of Individual Students
- ▶ Specificity on How the School, the Board, and CPS Will Use Data To Measure School Performance and Quality
- ▶ Specificity on who will be involved in data evaluation and action planning and when this will take place
- ▶ Measures and Indicators to Track Achievement of Non-Academic Student and Organizational Goals, Including Board Development, Operations Stability, and Financial Viability

## **Governance and leadership can make or break a school: Be Explicit About:**

- ▶ Governance and Leadership The Roles, Responsibilities, and *Authority* of the Board/LSC and School Leadership
- ▶ The Composition of the Governing Board/LSC, Qualifications and Skills Sets Sought in Potential Board/LSC Members, and the Strategy for Recruiting the Board/LSC
- ▶ A Timetable and Strategy for Transitioning from a Founding Governing Entity to an Established Governing Body
- ▶ Standing, Special, and Advisory Committees

## Governance and Leadership (Continued)

- ▶ Be Explicit About:
  - Design Team Members Responsible for Rolling Out the School and Timetable for Transition to Employed Staff
  - The Qualifications / Experience Sought in School Leadership and the Timetable and Process for Identifying and Hiring the School Leadership / Management Team
  - The School's Organizational Structure and Reporting Relationships
- ▶ Leadership Should Be Identified Early On and Directly Involved in School Implementation and, Ideally, Planning. It is Strongly Recommended that Leadership Be Identified Before First Design Phase Interview
- ▶ By the Interview Date, All Governing Board Members and School Leadership Should Be Able to Fully Articulate the School Application

## **Facilities planning should be based on the programmatic needs of the school**

- ▶ Based on the Size and Programmatic Needs of the Proposed School, the Application Should Contain a Space Usage / Needs Plan For Each Phase of School Growth
- ▶ The Application Should State Explicitly if a CPS or Non-CPS Site is Assumed
- ▶ If a CPS site, Describe:
  - Whether Targeted Facility Can Accommodate Proposed School (If Applicable)
  - Extent of Improvements and Reconfigurations Needed for School (If A Facility is Identified)
  - A Drop-Dead Date for Gaining Access to an Identified or Unidentified CPS Facility
  - A Back-Up Plan, Possibly Including a Delayed School Open if Site is Not Available by Prescribed Date

## **The use of a non-CPS site will require additional planning and resources**

- ▶ Process and Timetable for Identifying and Acquiring a Site in Which to Open and Whether Site is Intended to be Temporary or Permanent
- ▶ Location and/or Evidence of Likely Site Acquisition or Use; and Site Description
- ▶ Plan and Timetable for Identifying, Securing, Developing, and Financing a Site, Including Project Management, Estimated Costs of Acquisition and Construction and Source of Funds
- ▶ A Back Up Plan for Opening in Temporary Space if Site Not Ready on Time

## The financial plan should reflect the school's full academic plan and operational reality

- ▶ Budgets and Projections Should Quantify Every Single Component of School Application. *Check and Double-check Application Narrative and Budgets. School design and financial planning must be closely coordinated; the former should drive the latter.*
- ▶ Budget Assumptions Should be Stated Clearly for CPS-Formatted Start-up, Two-Year Cash Flow, and Five-Year Budgets and Projections. *Error on the Side of Detail and Transparency.*
- ▶ Fundraising May Be Necessary to Support *All* Critical School Costs. *Budgeted Fundraising Must Be Supported by Evidence of Funds Commitments.*
- ▶ Budget to Achieve Annual Surpluses and Include Specified or Restricted Reserve and Contingency Line Items *Treated as Projected Expenses*