



Checklist for Developing an Academic Plan for Student Success

This checklist provides guidance to support charter school applicants in developing a thorough academic plan to demonstrate how the school's academics will lead to student success. The checklist focuses on nine critical components of the academic plan:

- 1) Establishing the mission and vision for the school
- 2) Determining the key educational philosophies and approaches to education
- 3) Selecting high-quality curricula that supports the school's mission and vision
- 4) Establishing an aligned assessment system and planning for use of data
- 5) Ensuring equity and access to rigorous instruction
- 6) Creating a learning environment for all: hiring, retaining, and developing staff
- 7) Scheduling
- 8) Developing a plan for engaging and communicating with key stakeholders
- 9) Budgeting for academic programming

To complete the checklist:

- 1. For each component, review the tasks listed and the resources provided to support task completion. After completing the task, record any budget implications for implementation of your academic plan. This ongoing data gathering on budget implications will support you in developing the final budget for school launch.
- 2. The tasks for each component are listed in the order they should be completed. Though completion of each of the individual components can be accomplished using a variety of sequences, the components are listed using a sequence for completion that is likely to be efficient.

Establishing the Vision and Mission for the School

The mission and vision statements serve as the guidepost, North Star, or anchor point for your school. Every aspect of your school will need to have the mission and vision clear and alive in it. To establish the vision and mission for the school, you will want to engage key stakeholders in a process to get their buy-in and ideas. Your application will require clear statements of the school's planned vision and mission. In the sections of your application where you state the vision and mission statements, you will make a compelling case for the ways your school will positively impact the students and families who will make up your school community. Years after the founding school leaders are gone, the mission and vision should help future generations determine whether decisions would fall in line or out of scope of the school's purpose.

Questions to Check Task Status	Resources to Support Task Completion	Budget Considerations
 Is your vision statement clearly stated? Is your mission statement clearly stated and aligned with your vision statement? Do you have consensus across your community of stakeholders (e.g., board members, parents, educators) to support the vision and mission as they are stated? 	 https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/vision-mission-statements/main - Guidance for organizations on how to create mission and vision statements. https://www.rickmaurer.com/wp/wp-content/uploads/2011/01/CreatingVision.pdf - Directions on how to craft a vision statement. 	 Pre-launch funds to convene stakeholders to develop the vision and mission statements. Launch funds to develop materials to communicate the vision and mission to prospective board members,
 Have you explained why the students and larger community will benefit from your new school? Do the mission and vision communicate what graduates of your school will know and be able to do? 	 http://www.jeffersonawards.org/wp- content/uploads/2016/10/Mission-Statement- Exercise.pdf - Step-by-step directions for creating a mission statement. 	teachers, students, parents, etc.

Determining the Key Educational Philosophies and Approaches to Education

New schools are frequently initiated to allow for innovations in educational philosophy and approaches to education. For example, schools may be formed to provide students with greater opportunities for personalized learning, use of new technologies in learning, increased real world connections to learning, etc. For each educational philosophy and/or approach, the academic plan requires a narrative that describes in detail the history of the philosophy and/or approach and the research that shows the likelihood of success for schools using this philosophy or approach. The academic plan must explain why any proposed philosophy or approach is needed for the proposed student population to be successful. Most critically, if the academic plan proposes more than a single educational philosophy or approach, the academic plan must make clear how any educational philosophies or approaches work together to create a coherence in educational philosophy and approach to education for the school.

	Questions to Check Task Status		Resources to Support Task Completion		Budget Considerations
•	Is there clear coherence in the proposed	•	https://www.thoughtco.com/teaching-philosophy-	•	What funding will be needed to
	educational philosophy and/or approach for the		<u>examples-2081517</u> - Provides examples of how to develop		provide staff with sufficient
	school?		personal philosophy statements that can inform writing		expertise to enact proposed
•	Does the academic plan demonstrate clearly how		of a school philosophy statement.		philosophies/approaches?
	the proposed educational philosophies or	•	https://ies.ed.gov/ - Provides summaries of critical	•	Are there certifications or
	approaches to education will benefit the		research in education that may be useful in explaining		licenses that require funding to
	students and families of the school?		selected philosophies or approaches.		enact selected philosophies or
•	Are any proposed educational philosophies or	•	https://www.data.gov/ - Government data that may be		approaches?
	approaches to education firmly grounded in		useful in justifying choices in educational philosophies or		
	research?		approaches.		

Selecting High-Quality Written Curriculum

The charter application requires applicants to describe clearly both the process for selecting curriculum and evidence that the curriculum in each content offered will be high quality. Quality written curriculum include several key components, including but not limited to:

- > A clear scope and sequence for standards and learning objectives to be taught throughout the course of study, with horizontal and vertical alignment;
- > Embedded formative assessments to inform instructional decisions; and
- > Unit plans, lesson plans, and teacher and student resources designed to help students meet rigorous expectations, with clarity for teachers on how to scaffold learning for diverse learner populations (including students who are ELLs and have identified special needs) and how to enrich learning for advanced students.

In addition, quality written curriculum show evidence they are:

- ➤ Anchored in research, and promote best practices in the content;
- > Aligned to state standards;
- Culturally responsive;
- > Equitable and accessible to all students (including use of universal design features); and
- Organized to support multiple opportunities for students to learn new content.

Questions to Check Task Status	Resources to Support Task Completion	Budget Considerations
Do all proposed curricula align with your mission,	• <u>www.EdReports.org</u> - A site that provides third-party	What is the per teacher cost for
vision, philosophy, and instructional approach?	reviews of curriculum materials.	written curricular materials?
 Are the connections of mission, vision, 	• <u>www.Lousianabelieves.com</u> - A site that provides third-	What is the per student cost for
philosophy, and instructional approach clear	party reviews of curriculum materials.	written curricular materials?
in the curricula selected?	• <u>www.Cast.org</u> - A site that provides extensive	Do per teacher and per student
Do all proposed curricula include the following key	information on universal design for learning and	costs include digital access to
components?	selection of materials that meet UDL standards.	materials, including delivery of
		assessments?

- A clear scope and sequence for standards and learning objectives to be taught throughout the course of study, with horizontal and vertical alignment;
- Embedded formative assessments to inform instructional decisions;
- Unit plans, lesson plans, and teacher and student resources (including models for use of these materials); and
- Instructional resources and clarity of use to support diverse learner populations (including students who are ELLs and have identified special needs) and how to enrich learning for advanced students.
- Does your academic plan include examples/models, explanations and evidence to show that it is:
 - o Research-based,
 - o Aligned to state standards,
 - o Culturally responsive,
 - Equitable and accessible for all students, and
 - Organized to support multiple opportunities for all students to learn new content?
- If your school will add students in grade levels not planned for instruction currently, will the curricula selected allow for addition of vertically aligned curriculum for those next grade-levels planned? (e.g., if you start in grades K-5, does the curriculum offer grades 6-8?)

- Does the publisher of the written curricular materials include any professional learning supports/onboarding for use of the materials as part of the initial costs of purchase?
- What are replacement copy costs for lost or damaged curricular materials?
- If your school will add gradelevels, do the curricular materials to be purchased allow for near future purchases at a discounted rate?

Establishing an Aligned Assessment System and Planning for Use of Data

All stakeholders have a need for data to make informed decisions. Classroom educators need data to determine next steps in instruction. School and network leaders need data to make decisions on next steps for curriculum, professional learning, and talent management. Parents and students need data to determine goals and opportunities for next steps in a student's academic path. Board members need data to determine strategic plans for sustainability of strong programming for a school. The charter authorizer, state accountability, and federal accountability policies and regulations require that board and school leaders collect and provide data. Since the purposes for data and the end users of data vary, typically multiple assessments are needed to give a fuller picture of student performance. Schools must plan for formative, diagnostic, interim or benchmark, and summative assessments to allow for data collection and analyses. Schools should develop an assessment plan (a list of all of the data needs, which assessments fill which needs for which stakeholders, and norms for analyzing and using the data).

Questions to Check Task Status	Resources to Support Task Completion	Budget Considerations
 What data and assessments do teachers need to determine next steps for instruction (e.g., reteaching or differentiated instruction) and to complete required evaluations of students? What data and assessments do school and network leaders need to make decisions on next steps for curriculum, professional learning, and talent management? What data and reports are needed to inform parents and students and to allow for effective goal setting? What data and assessments do board members need to determine strategic plans for sustainability of the school and for overall governance of the school? 	 https://ccsso.org/taxonomy/term/7 - A site that provides an extensive set of articles and tools to help educational leaders understand systemic assessment design. https://achievethecore.org/ - A site with a variety of 	 What is the total funding available for all assessments combined? What is the per student cost for assessment?

What data and assessments are requisite to	
meet authorizer, state, and federal	
accountability guidelines and regulations?	
How do SMART goals and other strategic	
planning metrics reflect the use of data for	
decision-making?	

Ensuring Equity and Access to Rigorous Instruction

While not all students enter the classroom with the same knowledge and experiences, it is essential that all students meet or exceed state standards by the end of the academic course of study. Educators provide all students with access to core instruction while simultaneously providing interventions and extensions (tiered instruction) as needed. The academic plan must describe how course schedules, multi-tiered systems of support, supplemental resources, etc. will ensure that all students, including those with identified special needs and students for whom English is a second language, will have equitable access to the core curriculum and any needed supports to meet or exceed state standards.

Questions to Check Task Status		Resources to Support Task Completion		Budget Considerations
How does the school schedule design allow	•	https://files.eric.ed.gov/fulltext/ED502201.pdf - This	•	How does the schedule design
multi-tiered systems of support for students?		Maryland State DOE framework for MTSS provides a		impact facilities requirements
For example, when will students participate in		strong foundation in helping people see how the tiers fit		(e.g., how many separate
core, intervention, and extension instruction?		together with identification of students with special		rooms are required to
 Are there sufficient offerings for students with 		needs.		implement the proposed
the variety of identified special needs expected?	•	http://www.florida-		schedule)?
What are these offerings?		rti.org/educatorresources/mtss_book_implcomp_012612	•	How does the schedule design
 Are there sufficient offerings for students for 		<u>.pdf</u> - Florida State DOE provides some great language		impact staffing requirements
whom English is a second language? What are		and clarity on the different tiers of instruction.		(e.g., how many staff members
these offerings?	•	https://www.edutopia.org/practice/improving-learning-		are required to implement the
Have you fully described the relationship		<u>all-students-multi-tiered-approach</u> - An article which		proposed schedule)?
between any core offerings and any		outlines components of putting together a strong MTSS.	•	What is the cost of
interventions and extensions planned? Have you	•	https://backend.edutopia.org/sites/default/files/resource		supplemental materials (both
demonstrated how these distinct offerings are		s/stw-pk-yonge-k-12 rti flowchart draft .pdf - A		technology-based and print)
designed to promote student success while		flowchart sample that shows what a strong systemic		required to support students
simultaneously ensuring all students have		process looks like where MTSS works. The key to making		with identified special needs?
access to rigorous instruction that will lead to all		this work is having very clear decision rules at each "hand	•	What is the cost of
		off" point. (e.g., what specific scores for universal		supplemental materials (both

- students meeting or exceeding state standards by the end of the academic course of study?
- Have you connected the strategies for ensuring all students have access to rigorous instruction with the data you will collect from planned assessments? Does your plan clearly show how data will be used to inform decision-making on entrance and exit criteria for any intervention or extension programming planned?
- Have you made clear how your school will directly address focused work to ensure culturally-responsive academic programming with a diversity, equity, and inclusion lens, including but not limited to eliminating gaps in access to rigorous curricular materials and programming for traditionally underserved students?

- screeners tell one that a student needs a Tier 2 support and what specific scores tell one that the student can be exited from that support? For each support that a district identifies as "an approved Tier 2 support," what are the "non-negotiables" or "what is meant by fidelity?")
- https://www.education.ie/en/Education-Staff/Information/NEPS-Literacy-Resource/neps literacy good practice guide.pdf - A guide to support thinking re: the selection of MTSS for literacy.
- https://ies.ed.gov/ncee/wwc/ A U.S. Department of Education-sponsored site that shares the latest information on which programs show real evidence for changing student outcomes. When selecting programs/materials for intervention, districts should select from those programs that show moderate to strong evidence and should avoid programs that show no or limited evidence.
- https://www.nsgt.org/ An organization website that provides extensive information and guidance on programming options to support gifted and talented students.

technology-based and print) required to support students for whom English is a second language?

Creating a Learning Environment for All: Hiring, Retaining, and Developing Staff

At the heart of the education process is the building and sustaining of relationships. Staff members must be knowledgeable, caring, and dedicated to the students, the school community, and to creating a learning environment. Hiring of strong, qualified staff who believe in your school's mission and vision and then retaining and developing them individually and as a team is a primary means to produce an excellent school experience for all students.

Questions to Check Task Status		Resources to Support Task Completion		Budget Considerations
What staff will be needed to deliver the	•	https://learningforward.org/ - Learning Forward is the	•	What is the total allocation for
academic programming designed for the school?		premier organization devoted to professional		staffing the school in year one?
What are the required and preferred skills and		development of educators and provides an abundance of		In subsequent years? How will
capacities needed for each job/staff member		tools and resources for staff development.		current and future funding
needed?	•	http://www.publiccharters.org/sites/default/files/migrat		allow for this level of staffing?
What is the hiring plan for staffing the school in		ed/wp-content/uploads/2016/11/National-Best-	•	What is the total budget
the initial year? For future years?		<u>Practices Teacher-Recruitment-and-Pipelines.pdf</u> - A		allocated for hiring of staff?
What will encourage high-quality, dynamic		report from the Illinois Network of Charter Schools and	•	What is the total budget
teachers apply for teaching positions at your		the National Alliance for Public Charter Schools that		allocated for professional
school over any other and what will get them to		describes best practices and provides tools for the hiring		development in year 1? In
stay? What design elements in the programming		and retention of teachers.		subsequent years?
for the school will help in the hiring and	•	https://resources.workable.com/tutorial/teacher-job-	•	What percentage of the total
retention of quality staff for each required		<u>boards</u> - Provides a list of teacher recruitment job boards.		school budget is allocated for
position?				staffing?
What professional development will be				
provided to onboard new staff members?				
What is the professional development plan for				
opening the school (including topics for				
development and a high-level timeline)?				

What is the cycle for development of ongoing
professional learning in subsequent years for
the school (beyond year 1)?

Scheduling

The schedule is one of the most important tools in creating a successful learning environment and should reflect your school's mission and vision. The allocation of varying times for activities helps set the teaching and learning priorities. Schedules must allow for sufficient time to deliver selected core curriculum, interventions, extensions, and other academic programs and for all students to eat meals, arrive to and depart from school safely, and to engage in other programming designed to fully educate each child. The schedule must also allow for clarity in staffing needs and facilities use.

	Questions to Check Task Status	Resources to Support Task Completion		Budget Considerations
•	What is the total length of the school day?	• https://www.erstrategies.org/news/three-step-strategies	•	How do staffing budget
•	When will students arrive to school daily?	schedule - A website that provides an array of ideas and		allocations impact scheduling
	When will students depart school daily?	resources to support initial design of an effective school		options? Can the schedule be
•	When will staff arrive to school daily? When will	schedule.		refined to reduce the cost of
	staff depart school daily?	 https://entangledvelocity.com/wp- 		staffing?
•	Triat is the time and cated for means each day.	<u>content/uploads/2019/06/Unlocking-Time-v4-Web.pdf</u> -	•	How does the number of rooms
	When will each group of students eat these	Provides both research and a variety of free tools that can		in proposed facilities impact
	meals?	be useful in making decisions regarding efficient use of		scheduling options? Can the
•	For each core curriculum selected, what is the	time to increase learning opportunities for students via a		schedule be refined to reduce
	total instructional time to be allocated for study	well-designed school schedule.		the cost of facilities?
	daily?			
•	For each intervention, extension, or other			
	programming beyond the core curriculum, what			
	is the time allocated daily?			
•	How can schedules be staggered to allow for			
	maximum efficiencies in staffing and facilities			
	use?			

Developing a Plan for Engaging and Communicating with Key Stakeholders

For a school to launch successfully, a wide range of stakeholders are needed, including but not limited to: staff, family members of the students who will attend the school, school board members, the larger community in which the school will be located, local business people and merchants, and the students themselves. Engaging these various stakeholders in launching and then sustaining the school plus supporting your school's mission and vision is therefore a critical step in the school launch process.

	Questions to Check Task Status		Resources to Support Task Completion		Budget Considerations
•	Who are the critical stakeholders for our school?	•	https://entangledvelocity.com/wp-	•	What is the total allocation for
	Does the academic plan spell out clearly the		content/uploads/2019/06/Unlocking-Time-v4-Web.pdf -		marketing of the school to
	anticipated stakeholder groups, how to engage		Ideas for developing a strong communication plan.		engage and retain all identified
	these stakeholders authentically, and how to	•	https://www2.ed.gov/programs/readingfirst/support/stak		stakeholders?
	retain their engagement in the launch and then		eholderlores.pdf - Resource describing means to engage	•	What funds are needed to pay
	subsequent school years?		stakeholders in education, with a focus on literacy		for stipends, honorarium, or
•	Does the academic plan describe clearly the		programming.		other fees associated with
	communication strategies for sharing key	•	https://www.thoughtexchange.com/wp-		engagement and
	messages with each of the identified and critical		content/uploads/2018/02/five-criteria-for-effective-se-		communication of
	stakeholder groups?		education.pdf - White paper describing key elements for		stakeholders?
	o staff		stakeholder engagement.	•	What funds are needed for
	family members				parent and community
	 school board members 				outreach?
	 business leaders 				
	 community leaders 				
•	Does the academic plan include potential				
	activities that can help support engagement and				
	communication with key stakeholders?				

Budgeting for Academic Programming

For schools to be both approved by the authorizer and to be successful, they must have the financial resources and a well-designed strategic plan for ongoing financial stability. Each aspect of the academic plan contributes to the costs and options for budgeting. In reviewing the budget considerations listed for all other aspects of the academic plan, one can begin to develop an efficient and realistic budget to include in the academic plan. All plans should include both a well-defined budget (with all component costs and funds designed to pay for those costs) as well as a narrative to explain the proposed financials for the school.

	Questions to Check Task Status		Resources to Support Task Completion		Budget Considerations
•	Does the academic plan provide a narrative	•	https://www.renniecenter.org/sites/default/files/2017-	•	Using all of the information
	explanation for all proposed expenditures		01/SmartSchoolBudgeting.pdf An online whitepaper and		gathered, what is the total
	related to academic programming?		toolkit with extensive information on school budgeting		budget required for academics
•	Does the academic plan account for all budget		and links to many additional budgeting resources		in the pre-launch year?
	considerations and rely on known, sustainable	•	https://charterschoolcenter.ed.gov/sites/default/files/file	•	What is the total budget
	external funding? If some aspects of the budget		s/field_publication_attachment/TFP_Revenue_Tool_0.pdf		required for academics for the
	are as yet unclear, what mitigating strategies can		2009 publication from the National Resource Center on		school in year one?
	reduce financial risks for the school?		Charter School Finance and Governance with narrative	•	What is the total budget
•	Does the plan adequately describe how available		and tools to support budget development and monitoring		required for the ongoing
	funding will allow for year one operations of the		for charter schools		operation of academics beyond
	school? If not, what mitigating strategies are				year one? (i.e., what is the rate
	described to reduce financial risks for any				of increase for academic
	proposed funders or investors?				costs?)
•	Does the plan adequately describe how the			•	What are the funding sources
	school will acquire sufficient funds for				to offset costs required for
	sustainable operation of the school beyond the				academics each budget year?
	launch year? If not, what mitigating strategies				

are described to reduce financial risks that would	
cause closure of the school?	