



MONTANA
COMMUNITY
CHOICE SCHOOLS

Commission Member Application Review Guidebook

Insert Application Year

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Pre-Application Process

May - December

RFP Posted	Information Sessions	Notice of Intent	Epicenter Access	Pitch Meetings
Application window & directions to submit Application posted	Director hosts open webinars for potential Applicants to gain insight to CCS & the Application process	Applicants submit the NOI template to Director & Commission detailing a general overview of their school model	Applicants gain access to Epicenter to begin drafting their Application	Brief Zoom Meeting for Applicants to pitch their model to Director & Application Review Subcommittee with application process Q&A

Application Process

January - April

Written Applications Review	Public Forums	Applicant Interviews	Deliberation
Written Applications are evaluated according to the Application Criteria by the Application Review Subcommittee & Director Director provides Executive Summaries to Members & the BPE Applications are publicly posted	Applicants host the public, Application Review Subcommittee, & Director for an overview of their proposed school model. Local residents provide public comment.	Applicants answer clarifying questions & challenge scenarios from Application Review Subcommittee and Director.	Application Subcommittee and Director provide a final recommendation report on each Application to Members Applications are deliberated in an open meeting with input from the BPE & public culminating in a final vote by Members

Contracting to Opening

May through Fall of Next Year

Contracting	Building Oversight Model	Year Zero
Contracts offered to approved applicants	Performance Framework & oversight metrics built into Epicenter 1	School founder cohorts meet for training & consulting to fully build out their academic, cultural, operational, & financial models



Application Proposal Review Policy for Community Choice School Applications

May (prior to Application Deadline)

1. Application Launch Date Announced: The Community Choice Schools Application Deadline will be issued and posted by June 1st of each year on the [Board of Public Education's \(Board\) website](#) under the Community Choice Schools tab. The application will be broadly publicized statewide. All information related to the Application Process including the Founder Proposed School Application Guidebook can be found on [bpe.mt.gov](#) under the Community Choice Schools tab. The full Application Proposal comprises three phases; Phase I Written Application, Phase II Public Forum, and Phase III Applicant Interview.

June-December (prior to Application Deadline)

2. On-going General Information Sessions: Potential Applicants will have an opportunity to engage in orientation sessions pertaining to the upcoming Application Cycle. Logistics about General Information Sessions will be posted on [bpe.mt.gov](#) under the Community Choice Schools tab.
3. Notice of Intent: Applicants send the Community Choice Schools Commission (Commission) a Notice of Intent to apply for a new Community Choice School.
4. Written Application Platform Access: Applicants may begin submitting requests to access the written application platform in which they will be able to begin drafting their Application before final submission.
5. Pitch Meetings: Applicants are highly encouraged to sign up for a 30-minute Zoom meeting with the Commission's Application Review Subcommittee to present pitches for student recruitment and philanthropy. Applicants will also have an opportunity to ask clarifying technical questions.

January

6. Phase I Written Applications Due: Applications can be submitted to the Commission on (XX/XX/XX) until 5:00 p.m., Mountain Time. All Applications must be submitted electronically via the Application Platform.
7. Receipt of Written Application: The Commission will notify each Applicant by email within 24 hours of receipt of the Application and provide an outline of the application review timeframe.
8. Public Posting: Each complete Application and Executive Summary will be published on [bpe.mt.gov](#) under the Choice Schools tab along with directions for submitting public comment, allowing the public to read each Application and submit public comment before the Commission takes official action in April. Written public comment will be closed one week prior to Deliberation in order for the Director to compile and distribute comments to Members.
9. Interview Scheduling: The Commission's Application Review Subcommittee will schedule interviews, in-person or by webinar, with each applicant team, including but not limited to: Governing Board, Charter Management Organization, Education Service Provider, proposed school leader, and legal counsel.

This Application Cycle is for Community Choice Schools opening not before (XX/XX/XX—date).

February

10. Written Application Review: The Commission's Application Review Subcommittee will evaluate each Application based on the Community Choice Schools Application Evaluation Criteria, a policy that guides the Commission's decision to approve or deny a Choice School Application.
11. Phase II Public Forum Begins: The Applicant team makes a presentation of their proposed school to the resident community, Director, and Members of the Application Review Subcommittee. The presentation is followed by an opportunity for the public to offer their comments. Public Forums will be held in the community of the proposed school. The purpose of the Forum is to understand community needs, gauge outreach efforts, and the ability to build authentic relationships with families and stakeholders.

March

12. Phase II Public Forums Continue
13. Provide Executive Summaries to the Board of Public Education: Board of Public Education Application Review: Within **45 business days** of (XX/XX/XX—Application Deadline Phase I Written Application), the Commission will send a condensed packet containing an Executive Summary of each application to the Montana Board of Public Education's Charter Committee for presentation at the Board's regularly scheduled March meeting. The Board Charter Committee will have **15 calendar days** from receipt of the Executive Summary to review the information, share it with the full Board, and provide the Commission with written input e.g., questions or concerns to inform the Commission's final communications with the applicants before the Commission convenes for action. These 45 business days may be extended and adjusted with the Board of Public Education if the Commission receives more than three applications.
14. Phase III Applicant Interviews Begin: The Commission's Application Review Subcommittee will conduct an interview with each Applicant Team. The interview allows the Commission to ask targeted questions seeking clarification on content submitted in the Application, probe areas of uncertainty or concern, and to go deeper into the Applicant Team's capacity to possess the academic, organizational, and financial capacity to open and sustain a successful school. This constitutes a complete Application Proposal Review Process.

April

15. Phase III Applicant Interviews Continue
16. Director's Summary to Members: The Commission's Director will provide a Director's Summary of each Application and Interview to Commission Members as well as all written public comment.
17. Application Deliberation: The Commission will convene as soon as possible and no later than **60 business days** of (XX/XX/XX—date of the Application Deadline Phase III Applicant Interview). This timeframe may extend to 120 business days if more than 3 Applications have been received. Each Application will be deliberated individually in an open meeting. The Board's Charter Subcommittee members, the Chair of the Board, or the Board's Executive Director may join the Commission in formal deliberations about each Application, but only Commission Members may vote.
18. Application Approval: Applicants will be notified via phone and in writing of the approval. Approved Applications will advance to the Contracting stage.
19. Application Denial: Denied Applications will be provided with a written explanation as to why the Application was denied, and Applicants may re-apply in any future Application Cycle.

May

20. Contracting: Contracts will be signed within 45 business days of approval, provided the Applicant agrees to the terms of the Commission's proposed contract.

This Application Cycle is for Community Choice Schools opening not before (XX/XX/XX—date).



Proposed School Application Review Subcommittee Responsibilities

Purpose: The purpose of the Application Review Subcommittee is to participate in application reviews and make a recommendation to the Commission to approve or deny any proposed Choice School applications.

Role in the Proposed School Application Process

- November: Review Notice of Intent to Apply
 - Become familiar with the proposed location and model
- December: Participate in Pitch Meetings (or view recordings)
 - Opportunity to meet the founding team, provide feedback on their student recruitment and philanthropy pitches, and answer questions asked by the team about the application process
- February: Review full application
 - Evaluate each application according to the Application Review Criteria, noting questions for the interview
- February/March: Participate in Public Forums in the Local Communities
 - Public Forums provide the Commission with an additional indicator of community interest and applicant preparedness while providing opportunity for public comment.
- February/March: Participate in Interviews
 - Determine the applicant team's capacity to implement the model as proposed, their connection with community need and their ability to problem solve to multiple possible solutions
- March/April: Make a Final Recommendation to Commission
 - The Subcommittee and Director present final recommendations to the Commission at an open meeting.



Pitch Meeting Procedures for Application Review Subcommittee

Policy Related to Conducting Applicant Pitch Meetings

Applicants are encouraged to request a 30-minute Zoom meeting with the Commission's Application Review Subcommittee to practice elevator pitches. Each team will deliver two pitches: 1) to families when recruiting students; and 2) to potential funders. Commission Application Review Subcommittee Members listen to the pitches collecting feedback related to the following: founders demonstrating a compelling model, showcasing the founding team's capacities, and demonstrating their readiness to execute the proposed model.

Logistics

- Dates: First Wednesday in December/TBD
- Duration: 30 minutes
- Scheduling: Director to post link to sign-up on BPE page
- Attendees: Commission Application Review Subcommittee Members, Commission Director, Applicants
- Location: Zoom

Pitch Meeting Schedule

- Introductions (3 mins)
- The Recruitment Pitch (5-10 mins)
 - Commission Members offer feedback and ask clarifying questions
- The Funders Pitch (5-10 mins)
 - Commission Members offer feedback and ask clarifying questions
- Applicant Questions to Commission (5-10 mins)
 - Applicants may ask clarifying questions about the application and contracting processes

Components to Consider when Evaluating the Pitches

- Introduction, Vision, and Mission
 - Relevant expertise of the founding team
 - Brief outline of the school model and development progress
 - Clearly articulated mission and vision
- School Model Overview
 - Overview of key design elements
 - How the model aligns with community priorities
- Community Engagement and Research
 - How the founding team has engaged with the community so far
 - Insights from the community that have shaped the school's model
- Plan of Execution
 - High-level plans for launching the school, including aspirations for board development, hiring, continued community engagement, and facilities acquisition
 - Any partnerships or resources that will support implementation

Resources

- [NACSA Guide to Pitch Meetings](#)
- [NCSI Bold by Choice Episode Three: The Charter Application](#)



Pitch Meeting Notes Template

Pitch Meeting Notes		
Founder(s) & Team Members Present		
School Name		
Location		
Pitch Components	Student Recruitment Pitch	Funder Pitch
Vision & Mission		
Model		
Community Engagement		
Plan of Execution		
Additional Notes		



How to Access and Evaluate Applications in Epicenter

The Director will schedule a training session for Members led by Epicenter staff.

FAQs: <https://support.epicenternow.org/home/application/application-evaluator-faqs/>

Link to training recording:



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Written Application Executive Summary Template

Executive Summary	
School Name	
Founder Name	
Location	
Grades Served	
Mission	
Target Population	
Evidence of Community Support	
Instructional Model	

Proposed Grades and Enrollment		
Contract Year	Grade Level(s)	Enrollment
Year 1		
Year 2		
Year 3		
Year 4		
Year 5		
At Capacity		

Governing Board Members	
# of Members with experience related to:	
	Education
	Legal Compliance
	Real Estate and Facilities
	Financial Management or Accounting
	Fundraising & Development
	Community Engagement

School Leader	
Name	
Experience	
If not yet Identified, the search criteria and timeline	

Academic Program	
Instructional Design	
Type of Learning Environment	
Class Size and Structure	
Curriculum Overview	
Teaching Methods	

Financial Plan				
Financials submitted are adequate		YES		NO
Overview of Financial Plan				
Fundraising Contributions or Grants				

Operations	
Student Recruitment Plans	
Facilities Plan Including Back-up Plan(s)	



Proposed School Application Evaluation Criteria

Per the Montana Community Choice Schools Commission's (Commission's) proposed Community Choice School (School) application process, this rubric will be used to evaluate each received application. Application approval will only be granted to applicants that have demonstrated competence in each element of the published approval criteria and are likely to open and operate a successful Community Choice School.

"Demonstrated competence in each element" refers to the statutory requirement found in ([20-11-111 \(13\)\(a\) MCA](#)). The Commission interprets this requirement to mean that applicants must go beyond general statements of intent or theoretical plans by providing clear, measurable, and evidence-based indications of their ability to effectively address each key component outlined in the application process for establishing a Community Choice School in Montana. This will ensure that only well-prepared and capable organizations and individuals are authorized to operate schools, ultimately prioritizing the success and well-being of students and families.

Applicants should also demonstrate an understanding of the Commission's Performance Framework for Oversight and Evaluation.

Within each application section, please check the **Rating** that best describes the extent to which the Applicant met expectations for opening and operating a quality school.

- **Exceeds:** The response demonstrates a strong understanding of key issues and demonstrates capacity to open and operate a quality charter school. It goes above and beyond expectations with supporting evidence.
- **Meets:** The response demonstrates a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.
- **Partially Meets:** The response meets some of the criteria but lacks meaningful detail or requires additional information in one or more key areas.
- **Does Not Meet:** The response is significantly incomplete; lacks meaningful detail; demonstrates lack of preparation; and/or otherwise raises substantial concerns about the applicant's understanding of and ability to implement an effective plan, including if the applicant does not respond to the required section.

The Overall Section Rating should be used to provide a holistic evaluation of the section, including overall clarity of the plan presented within the section.

*General Disclaimer: Starting and operating a quality Community Choice School requires elements both tangible and intangible on the part of the Applicant and the proposed plan. *The purpose of this rubric is to aid the evaluators in having a rigorous discussion about the applications, in making recommendations to the Commission, and in providing feedback to the Applicants.* The Commission members reserve the right to approve or deny applications regardless of an application's perceived score or an evaluator's recommendation. Additionally, not all rating categories are considered equally, as some merit greater value to the overall likelihood of opening a successful Choice School. **Categories such as projected enrollment, proposed budget, cohesive academic program, and special education preparedness merit greater consideration.**

Evaluation Criteria Table of Contents

Section I:	Executive Summary
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Section VII:	Start-up Plan
Section VIII:	Optional Information
Section IX:	Summary and Recommendation

Section I: Executive Summary

Criteria	Areas of Strength			Areas of Concern				
<ul style="list-style-type: none">● Mission: The proposed school’s mission and vision are clearly articulated and realistic. The mission outlines the proposed school’s purpose, what it does, and for whom.● Target Population: clear description of, and rationale for, the target student population.● Community Support: evidence that there is sufficient need for the proposed school in the identified community. Applicant has provided evidence of community outreach activities that have resulted in support of the proposed school. Evidence can include completed intent to enroll forms, partnerships, business relationships, etc.● Pedagogy: clearly and succinctly described the key design elements and approach to instruction and assessment for the proposed school. The pedagogy described supports the stated mission and vision.● Location: The proposed school’s location is identified.● Grades Served: The proposed grades served meet the needs of the identified community.● Planned Enrollment: The proposed minimum, planned, and maximum enrollment each year for the term of the charter contract is identified and reflects the proposed community. <p>Primary Capacities</p> <ul style="list-style-type: none">● Strategic Focus on Mission● Community Commitment	<ul style="list-style-type: none">●			<ul style="list-style-type: none">●				
	Questions							
	<ul style="list-style-type: none">●							
Rating		Does Not Meet the Standard		Partially Meets the Standard		Meets the Standard		Exceeds the Standard

Section II: Board Governance and School Leadership

Criteria	Areas of Strength		Areas of Concern					
<ul style="list-style-type: none">● Bylaws: at minimum, addresses the board appointment/election process, board member criteria, board size, terms and term limits, board member duties and expectations, board meeting cadence, attendance and quorum requirements, procedures for board meetings and voting, board officers and their roles, board committees, board member removal, and board member succession plans.● Board Members: collective experience and expertise related to education, legal compliance, real estate and facilities, financial management or accounting, fundraising and development, and community engagement; and● Proposed School Leader: experienced school leader of student populations that are similar to those that the proposed community choice school will enroll. OR Applicant details sound and comprehensive process to recruit a qualified school leader, including criteria and timeline that will be used.● Proposed management team: experienced in operating schools (with similar student body makeup), and the applicant demonstrates the effectiveness of the operator in the following areas: academics, operations, and financial oversight. OR Applicant details sound and comprehensive process to recruit a qualified management team, including criteria to be used and a timeline. <p>Primary Capacities</p> <ul style="list-style-type: none">● Strategic Focus on Mission● Community Commitment● Building a Coalition● Team Awareness	<ul style="list-style-type: none">●		<ul style="list-style-type: none">●					
	Questions							
	<ul style="list-style-type: none">●							
Rating		Does Not Meet the Standard		Partially Meets the Standard		Meets the Standard		Exceeds the Standard

Section III: Academic Program and Performance

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Academic Program: states the academic standards and graduation requirements (if applicable), and includes research-based evidence that the program is effective in meeting the needs of the target population and is aligned with stated standards and graduation requirements. For unique or innovative practices, the applicant presents a compelling rationale for effectiveness. • Standardized Assessment: identified to formally measure student achievement and growth and provides rationale for the chosen assessment. • Instructional Design and Curriculum: includes research-based evidence that they are effective in meeting the needs of the target population. The classroom size and structure are thoroughly explained. Teaching methods are explained and supported with research-based evidence. • Learning Environment: student behavior expectations and a plan to teach and reinforce the expectations. The applicant includes discipline policies that align with federal requirements. The discipline policies are appropriate for all students and distinguish and support any policy differences for special education students. The applicant's approach to discipline is in alignment with the school's mission and is culturally responsive to the target student population. • Assessment Plan: details beyond the annual standardized assessment, provides rationale for assessment plan, and clearly explains how it will evaluate student needs and measure the effectiveness of the academic program. • Special Education Program: The applicant demonstrates an understanding of legal requirements and dedicated appropriate 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
	<div>Questions</div> <ul style="list-style-type: none"> • 	

<p>resources to identify students and implement high-quality services and supports for students with disabilities.</p> <ul style="list-style-type: none">● English Language Learners: understanding of legal requirements and dedicated appropriate resources to identify students and implement high-quality services for students who are English Language Learners.● Gifted Program: understanding of legal requirements and dedicated appropriate resources to identify students and implement high-quality services for gifted students.● Academically Challenged Students: understanding of legal requirements and dedicated appropriate resources to implement high-quality services for students who are academically challenged and/or performing below grade level.● Professional Development Plan: for the preoperational year and the first year of operation. The plan articulates how it will support staff and ensure the proposed program is implemented with fidelity.● Co-curricular or Extracurricular Programs: plans to implement such programs, including funding and the proposed delivery of the programs. OR why the proposed choice school has chosen to not offer cocurricular or extracurricular programs. <p>Primary Capacities</p> <ul style="list-style-type: none">● Strategic Focus on Mission● Community Commitment● Reflective Learning● Knowledge, Skills, and Execution								
Rating		Does Not Meet the Standard		Partially Meets the Standard		Meets the Standard		Exceeds the Standard

Section IV: Operations Plan

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Student Recruitment and Enrollment Plan: detailed for the target population. A lottery procedure is described that meets all legal requirements. • Calendar and Daily Schedule: aligns with the proposed school's mission and key design elements. • Organizational Structure and Staffing Plan: aligns with the proposed school's mission and key design elements. The applicant clearly delineates the roles and powers of the board, school administration, advisory bodies, and any additional external organizations. • Staffing Plan: staffing chart for year one and staffing plan for the term of the charter contract demonstrate a priority on implementing the proposed school's identified education program with fidelity. • Recruiting and Development: recruitment and professional development plans are based on evaluated teacher needs, are aligned to the proposed school's mission, and are designed to help teachers meet school goals. • Evaluation: school leadership and staff evaluation plan that aligns with the school's mission and encourages continuous improvement. • Parent Involvement: identified opportunities and expectations for parents to be involved at the school. Applicant makes it clear that all student enrollment is not dependent on parental participation in activities or opportunities. • Contractual Relationships: identify those required for the proposed school to begin and maintain operations with an anticipated timeline for execution of the contracts. The contractual relationships described are free of any actual or 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
	<div>Questions</div> <ul style="list-style-type: none"> • 	

<p>perceived conflicts of interest between the applicant and the contractor.</p> <ul style="list-style-type: none">● Transportation: evidence of consideration of student transportation needs and has developed an adequate policy and recommendations for parents to address those needs. The applicant describes the process for safe drop off and pick-up of students.● Food Service: evidence of consideration of student needs and has developed an adequate plan to address those needs. The applicant has a plan to meet the needs of students who meet free and reduced-price meal eligibility guidelines for both breakfast and lunch.● Facility: thorough understanding of the facility needs for the proposed school and includes back-up and contingency plans should the facility not meet particular deadlines. Plans for construction, including a timeline and anticipated cost. Understanding of legal requirements for school facilities in Montana. <p>Primary Capacities</p> <ul style="list-style-type: none">● Strategic Focus on Mission● Community Commitment● Building a Coalition● Reflective Learning● Creative Problem Solving● Effective Decision Making● Relationship with Success and Failure● Team Awareness● Knowledge, Skills, and Execution								
Rating		Does Not Meet the Standard		Partially Meets the Standard		Meets the Standard		Exceeds the Standard

Section V: Financial Plan

Criteria	Areas of Strength		Areas of Concern					
<ul style="list-style-type: none">● Financial Policies: plan demonstrates the applicant has personnel and/or a management company with governmental accounting experience in place and the plan follows generally acceptable accounting practices. The financial controls described ensure that adequate auditing and reporting procedures are in place.● Insurance: plan is in place to obtain all required coverage from a reputable provider.● Start-up Budget: for years 0 through 5 is based on realistic assumptions for all revenues and expenditures and does not count on uncommitted funds for a balanced budget.● Operational Budget: includes reasonable and adequate costs for all staff, services, supplies, equipment, and technology included in the application and/or essential to the school implementing the proposed model with fidelity.● Cash Flow: start-up and first year projections are based on realistic assumptions.● Fundraising: evidence of fundraising contributions (e.g. letters of commitment from individuals and organizations), if mentioned in the financial plan. <p>Primary Capacities</p> <ul style="list-style-type: none">● Strategic Focus on Mission● Community Commitment● Effective Decision Making● Knowledge, Skills, and Execution	<ul style="list-style-type: none">●		<ul style="list-style-type: none">●					
	Questions							
<ul style="list-style-type: none">●								
Rating		Does Not Meet the Standard		Partially Meets the Standard		Meets the Standard		Exceeds the Standard

Section VI: Special Situations - School Conversion

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Petition of Support: included • Evidence of Past Performance: is true and complete and describes the school's current capacity for growth that is realistic and evidence-based. • Within Third-class District or School: <ul style="list-style-type: none"> • The third-class district has elected to establish a community choice school; • The third-class district has elected to convert a grade or grades to a choice school from an existing school; • The choice school is a tribal choice school; • The choice school is a virtual community choice school; or • The governing board of the choice school has received approval, by a majority vote, of a memorandum of understanding from the third-class school district's board of trustees. <p>Primary Capacities</p> <ul style="list-style-type: none"> • Community Commitment • Building a Coalition • Effective Decision Making • Knowledge, Skills, and Execution 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
	Questions	
	<ul style="list-style-type: none"> • 	
<p>Rating</p>	<p>Does Not Meet the Standard</p>	<p>Meets the Standard</p>

Section VI: Special Situations - Educational Service Providers

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Student Population: demonstrated success with students similar to the targeted population, including academic achievement and successful management of nonacademic school functions. • Contract: proposed duration of the contract with the educational service provider. • Roles and Responsibilities: defined for the governing board, the school staff, and the educational service provider. The roles and responsibilities are appropriate under Montana state law, and will support the proposed school's educational model. • Services and Resources: provided by the educational service provider detailed. The services to be provided are appropriate under Montana state law and will support the proposed school's educational model. • Evaluation of ESP: method and timeline described • Contract: methods that will be used to oversee and enforce the contract with the proposed ESP are detailed. • Renewal and Termination: investment disclosure and conditions for the proposed ESP are described. • Conflicts of Interest: disclosures and explanations of any existing real or potential conflicts of interest between the governing board and the proposed ESP, or any affiliated business entities are included. <p>Primary Capacities</p> <ul style="list-style-type: none"> • Strategic Focus on Mission • Community Commitment • Building a Coalition • Effective Decision Making • Knowledge, Skills, and Execution 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
	<p>Questions</p> <ul style="list-style-type: none"> • 	
<p>Rating</p>	<p>Does Not Meet the Standard</p>	<p>Meets the Standard</p>

Section VI: Special Situations - Virtual School

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Course Credits: description of the proposed school's system and how the proposed system compares with Montana law. • Compliance: description of how the proposed school will monitor and verify full-time student enrollment, student participation in a full course load, credit accrual, and course completion. The plan is complete and demonstrates a thorough understanding of the considerations and requirements in developing and operating a virtual school. • Student Progress and Performance: describes how the proposed school will monitor and verify student progress and performance in each course through regular, proctored assessments and submissions of coursework and parent-teacher conferences. The plan is complete and demonstrates a thorough understanding of the considerations and requirements in developing and operating a virtual school. 	•	•
	Questions	
	•	
Primary Capacities <ul style="list-style-type: none"> • Effective Decision Making • Knowledge, Skills, and Execution 		
Rating	Does Not Meet the Standard	Meets the Standard

Section VI: Special Situations - Out of State Providers

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Past Performance: evidence of past performance of all schools currently in operation across the nation. • Portfolio of Schools Status: The applicant identifies all schools that were closed or charters that were revoked or not renewed for any reason. • Capacity for Growth: current capacity and plans for developing capacity to support the proposed school in Montana. The applicant's plan is well-reasoned and supported by evidence. <p>Primary Capacities</p> <ul style="list-style-type: none"> • Effective Decision Making • Relationship with Success and Failure • Knowledge, Skills, and Execution 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
	Questions	
	<ul style="list-style-type: none"> • 	
Rating	Does Not Meet the Standard	Meets the Standard

Section VII: Start-up Plan

<div>Criteria</div> <ul style="list-style-type: none">The applicant has provided a clear and detailed start-up plan. The plan identifies specific tasks, includes timelines, and identifies responsible individuals for each task. The plan is realistic and lends itself to a successful community choice school opening. <div>Primary Capacities</div> <ul style="list-style-type: none">Effective Decision MakingRelationship with Success and FailureKnowledge, Skills, and Execution	Areas of Strength		Areas of Concern	
	<ul style="list-style-type: none">		<ul style="list-style-type: none">	
	Questions			
	<ul style="list-style-type: none">			
Rating		Does Not Meet the Standard		Meets the Standard

Section VIII: Optional Information

Submitted (indicate by checking box)

- ☐ Pedagogical Approach
 - Description of educational approach/model behind why this curriculum and community
- ☐ Indian Education for All
 - Description of how Indian Education for All is included within the curriculum
- ☐ Governing Board Training
 - description of onboarding and planned training of board members
- ☐ Post Secondary Readiness
 - Description of how the educational approach/model prepare students to meet the standards for acceptance into the Montana University System
- ☐ Student & Staff Wellbeing
 - plan to attend to the mental well-being of the students and overall school community including what resources will be available for families
- ☐ Parent Family & Community Engagement
 - plans for meaningful engagement supportive of the initial and continued development of the school, including detailed plans for keeping parents, families, and the greater community informed and involved in your Choice School
- ☐ Facility
 - Describe a plan and timeline to secure a facility that meets the needs of the proposed learning programs and complies with health, safety, and local code requirements for a school.

Primary Capacities

- Effective Decision Making
- Relationship with Success and Failure
- Knowledge, Skills, and Execution

Areas of Strength

•

Areas of Concern

•

Questions

•

Summary Evaluation and Recommendation

The following universal criteria should be demonstrated throughout a proposed school application.

- The proposed school's mission, vision, and key design elements of the educational model are consistent throughlines in the application; responsive to the community the school seeks to serve; and grounded in sound research, proven practice, and/or other reasons demonstrating likely effectiveness.
- The founding team has the capacities and commitment to successfully launch and operate the proposed school.
- The financial and operational plans and assurances are viable, meet legal requirements, and are aligned throughout the application.

Areas of Strength	Areas of Weakness/Concern
•	•

Overall Rating	Rating Definition
	Exceeds: The response demonstrates a strong understanding of key issues and demonstrates capacity to open and operate a quality charter school. It goes above and beyond expectations with supporting evidence.
	Meets: The response demonstrates a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.
	Partially Meets: The response meets some of the criteria but lacks meaningful detail or requires additional information in one or more key areas.
	Does Not Meet: The response is significantly incomplete; lacks meaningful detail; demonstrates lack of preparation; and/or otherwise raises substantial concerns about the applicant's understanding of and ability to implement an effective plan, including if the applicant does not respond to the required section.



Public Forum Procedures for Members

Policy Related to Public Forum

The Commission's Application Review Subcommittee and Director will attend a Public Forum hosted by the Applicant Team in their local community. The Applicant Team will make a presentation of their proposed school to the resident community followed by an opportunity for public comment. This provides the Commission with an additional indicator of community interest and applicant preparedness.

Logistics

- Dates: TBD/February and March
- Notice to Community: The Applicant Team will be responsible for making notice to the community
- Duration: 60 minutes
- Scheduling: Commission Director will coordinate scheduling with the main contact on the Written Application
- Posting: Meeting agenda, time, location posted on BPE website
- Attendees: Commission Application Subcommittee Members, Commission Director, Applicants, interested members of the local community
- Location: In person in the local community where the school will operate (preferably in the proposed school building if possible)

Public Forum Schedule

- Introductions & Overview (10 mins)
- Presentation of the Proposed School Model (20 mins)
- Public Comment (30 mins)

Commission Debrief Immediately Following the Forum

- Application Subcommittee Members and Director debrief on the following topics for possible follow-up in the Applicant Interview:
 - Applicants understanding of community needs
 - Applicants outreach efforts/participation
 - Applicants ability to build authentic relationships with families and stakeholders



Public Forum Notes Template

Applicant Team					
School Name					
Location					
Applicant Team Members Present					
Notes on Applicants Presentation					
Community Engagement					
# of Community Members Present		# Community Members in Support		# Community Members Opposed	
Notes on Public Comment					
Follow-up Questions for Applicant Interview					



Application Interview Procedures for Members

Policy Related to Conducting Applicant Interviews

The Commission's Application Review Subcommittee and Director will conduct an interview with each Applicant Team. The interview allows the Commission to seek clarification on content submitted in the Application, and the interview is also an opportunity to go deeper into the Applicant Team's capacity, connection with community, and ability to problem solve via challenge scenarios.

Logistics

- Notice to Applicants: Included in Application Directions posted on BPE website
- Dates: TBD/March or April
- Duration: 90 minutes
- Scheduling: Director to schedule with applicant within 3 days of application receipt
- Attendees: Commission Application Subcommittee Members, Commission Director, Applicants
- Location: Helena or TBD

Commission Member Preparations

- Selection of questions: A list of questions and challenge scenarios are provided as a resource, each team member should select questions appropriate to each application to dig deeper into the team's ability to elaborate on their model, capacity to offer multiple layers of solutions to challenges, and their efforts to connect to the community.
- Application Subcommittee Members and the Director will convene on-line one week prior to conducting interviews to discuss questions & scenarios for each applicant as well as general purpose and approach to each interview. Each Member will select questions & send to the director to compile the final list, eliminating duplicants & organizing by topic/area.

Interview Schedule

- Commission Introductions & Overview (10 mins)
- Founding Team Introductions (10 mins)
 - Invite the founding team to BRIEFLY introduce themselves and share their current and potential future role with the proposed school and their personal "why" for founding this school
- Interview Questions and Challenge Scenario (60 mins)
 - Ask probing questions based on the review team's assessment of the written application and other touchpoints to date. Focus questions on the people, model, and execution; assess for preparedness to move to the next stage of start-up.
- Closing (10 mins)
 - Provide an overview of the next steps in the application process. Invite questions related to the process from the founding team.

Commission Debrief Immediately Following the Interview

- Application Subcommittee Members and Director discuss responses including interpretation of the team's ability to elaborate on their model, their capacity to offer multiple layers of solutions to challenges, and their efforts to connect to the community.

Resources

- [NACSA Guide to New School Applications](#)
- [NACSA Capacity Interview Guidelines](#)
- [NACSA Capacities of Founding Teams](#)
- [NCSI Bold by Choice Episode Three: The Charter Application](#)



Application Interview Template

This template is intended to help the Application Review Subcommittee prepare for and conduct an effective interview by distilling the most critical issues and concerns from the application review findings. As there may not be enough time to cover everything the team would like to address, it is important to identify priorities and ensure adequate time to address those priorities in depth. With that in mind, not every section of the application will be addressed in the interview. The focus should be on the sections that may have elicited concern and/or lacked a clear and comprehensive plan.

Within each interview section, please check the Rating that best describes the extent to which the Applicant met expectations for opening and operating a quality school.

- **Exceeds:** The response demonstrates a strong understanding of key issues and demonstrates capacity to open and operate a quality charter school. It goes above and beyond expectations with supporting evidence.
- **Meets:** The response demonstrates a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter school. It addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.
- **Partially Meets:** The response meets some of the criteria but lacks meaningful detail or requires additional information in one or more key areas.
- **Does Not Meet:** The response is significantly incomplete; lacks meaningful detail; demonstrates lack of preparation; and/or otherwise raises substantial concerns about the applicant's understanding of and ability to implement an effective plan, including if the applicant does not respond to the required section.

Executive Summary				
Questions		Response Notes		
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds				
Executive Summary Evaluation Comments				

People	
Community & Coalitions	
Questions	Response Notes
Founding Team	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
People Evaluation Comments	

Model	
Mission, Vision, Purpose	
Questions	Response Notes
Key Design Elements	
Questions	Response Notes
Outcomes	
Questions	Response Notes

Community Needs, Challenges, and Opportunities	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
Model Evaluation Comments	

Execution	
Organizational Systems	
Questions	Response Notes
Plan of Execution	
Questions	Response Notes
Policies and Assurance	
Questions	Response Notes

Financial Plan	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
Execution Evaluation Comments	

Facility Plan	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
Facility Plan Evaluation Comments	

Educational Service Provider	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
Education Service Provider Evaluation Comments	

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Team Challenge Scenario			
Scenario		Response Notes	
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds			
Team Challenge Scenario Evaluation Comments			



MONTANA
COMMUNITY
CHOICE SCHOOLS

Application Final Recommendation

Executive Summary	
School Name	
Founder Name	
Location	
Grades Served	
Mission	
Target Population	
Instructional Model	

Public Forum Summary	
Team's understanding of community need	
Team's ability to build authentic relationships with families and stakeholders	
Outreach efforts/participation	

Interview Summary	
Team's ability to elaborate on their model	
Team's capacity to offer multiple layers of solutions to challenges	
Team's efforts to connect to the community	

Final Recommendation to Commission	
Approve	
Rationale	
Conditions	
Deny	
Rationale	
Feedback	