



PHASE II:
NEW CHARTER SCHOOL APPLICATION GUIDE

Office of Educational Opportunity

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Introduction

Background and Mission

The Office of Educational Opportunity (OEO) was created by the Wisconsin Legislature in 2015 as part of the biennial budget Act 55 and amended in 2017 to allow for statewide authorization of charter schools.

The OEO exists to expand access to high-quality, innovative educational opportunities for students across Wisconsin by authorizing and overseeing public charter schools that meet local needs, interests, and demands. It is our goal to improve educational outcomes for students, especially those who are historically underserved and may not have access to high-quality educational options. Accordingly, the OEO seeks to identify strong charter applications that have the potential to instill the Wisconsin Idea by incubating new or innovative educational programs to address specific community needs that are currently not being addressed, supporting programs that have promise of closing opportunity and achievement gaps, and fostering programs that have the potential to disseminate successful practices.

New School Priorities

The OEO aims to expand learning opportunities for students in Wisconsin by receiving and reviewing applications for new, high-quality schools led by teams that have the skill, capacity, and vision to initiate and sustain innovative offerings. Successful applications will present plans that provide all students, including students with disabilities and students identified as English learners, with a quality education that develops the whole child, ensures efficient use of public resources, and demonstrates best practices to close opportunity and achievement gaps.

The OEO will consider charter applications when either or both of the following is true:

- The proposed school (a) offers a new and innovative educational program that is grounded in evidence-based practices; (b) is not currently offered (or not available at a level to meet demand) within the local context which the proposed school will serve, and (c) clearly shows how students' unmet needs will be addressed;
- The local school district within which the proposed school will be located has at least one school that received "Fails to Meet Expectations" ratings on Wisconsin Department of Public Instruction (DPI) Report Cards for at least two consecutive years. Consideration would only be given to proposals which target the specific grade levels of the district school(s) that receive Fails to Meet Expectations ratings; in other words, a proposal to OEO for a high school in a district with an elementary school that receives a Fails to Meet Expectations rating would not be considered unless the first criterion above is met.

In addition, the OEO seeks charter school applications that prioritize the education of at-risk students as outlined in WI §118.40 (3m)

- [The OEO shall] give preference in awarding contracts for the operation of charter schools other than the charter school established under a contract with the director under sub. (2x) (cm) to those schools that serve children at risk, as defined in s. 118.153 (1) (a).¹

¹ Students in grades 5 to 12 who are at risk of not graduating, including those who are dropouts, behind in credits/skills, habitual truants, parents, or adjudicated delinquents.

The OEO and the Universities of Wisconsin consider the following core values to be essential to the development of charter schools authorized by the OEO:

Innovation: The educational program of a proposed charter school and its design elements should be innovative, grounded in research and/or theory, rigorous, engaging, and effective for the anticipated student population.

Incubation and Dissemination: The educational program of a proposed charter school shows substantial promise for being a leading incubator for new or innovative teaching methods, curricula, organizational design, technologies, and other ways to meet students' diverse needs, as well as disseminating these innovative practices to the broader educational community.

Opportunity: The educational program of a proposed charter school is responsive to, and reflects the needs of, communities by providing high quality options for students and their families, particularly underserved populations. The proposed charter school should also reflect the diversity of the community it plans to serve.

Collaboration and Community Engagement: The proposed charter school should be developed *with* and *for* the community it plans to serve, by demonstrating clearly how it gathered and considered input, interest, and collaboration from prospective families, community members, and local community organizations, including student voice when applicable.

Effective Leadership Integrity: The administration and board of directors of the proposed charter school should embody principles of effective leadership, ethical decision making, and demonstrate the ability to solve complex educational issues to achieve both academic and social outcomes for the students, families and communities it serves.

Phase II: New Charter School Application Guide

A Phase II application can only be submitted if the applicant's Phase I prospectus has been approved by the OEO.

The next section describes the process and timeline associated with Phase II applications. It is important to note that applicants proposing schools serving less than 50 students will face a higher level of scrutiny due to the long-term fiscal challenges of operating a very small school, particularly at a high school level. If your proposed school falls into this category, please contact the OEO prior to submitting an application to further discuss the financial viability challenge associated with small size.

Before Submitting Phase II: New Charter School Application, applicants must:

1. Schedule a meeting with the OEO director at cynthia.gonzalez@wisconsin.edu to discuss Phase I: Prospectus feedback and Phase II application process.
2. Provide the OEO with at least three weeks' advance notice of the time, date, and location of community engagement session(s) to be held between September 6, 2026, and January 10, 2027.
3. Become familiar with Wisconsin statutes which govern charter school formation and operation, particularly [118.40 Charter schools](#).
4. Download and carefully review the [OEO Phase II: New Charter School Application materials](#).

Applicants are highly encouraged to:

5. Visit and connect with The Wisconsin Resource Center for Charter Schools (WRCCS) to learn about chartering in Wisconsin: www.wrccs.org.

New Charter School Application Timeline

The table below outlines the timeline for OEO's Phase II: New Charter School Application. As all approved applicants are required to have a planning year, the OEO strategically aligns its application timeline with the Wisconsin Charter School Program (WCSP) grant funding cycle. Synchronizing schedules allows prospective independent charter schools to simultaneously apply for WCSP planning year funding. However, it is important to note that applying to WCSP does not mean a school will receive grant funding, therefore, the school should not be dependent on this grant for opening.

Date	Activity
January 11, 2027	Phase II: New Charter School Application Due
January 15, 2027	Applicants are notified if the Phase II application is complete and will be reviewed by the Application Review Committee.
January 18 - March 2027	Application Review Committee reviews the application.
February - March 2027	Capacity Interview with application team.
April 2027	OEO director shares committee recommendation to the Universities of Wisconsin President for final approval.

No later than May 31, 2027	Applicant notified of the OEO's final decision.
May – June 2027	*If the applicant team receives a 'Conditional Approval', the applicant will submit additional documentation for review during this period.

Completeness Review

After proposals have been submitted to the OEO, they will be reviewed for completeness on (but not prior to) the due date. If submissions are incomplete (i.e., missing responses to required sections, sections left blank, etc.), the submission will be excluded from further review and the applicant will be required to submit a new application the following year. Applicants will be notified of the completeness or incompleteness of their submission as noted in the Prospectus Timeline above. Note that findings of *completion* are not indicative of the submission's *quality*.

Community Engagement in the Charter Application Processes

The primary purpose of charter schools is to offer innovative and previously-unavailable opportunities for families and students. Throughout the application process, assessing community need, demand, and engagement are critical steps in the development and potential approval of a new school application.

- *Need* refers to what's currently missing: families' access (or lack thereof) to quality schools, including new educational opportunities, unique or relevant instructional models, strong student outcomes, and other programmatic aspects that families and communities seek.
- *Demand* refers to the intention or desire of a sufficient number of students and families to attend a new charter school in order to make it financially viable.
- *Engagement* refers to the specific ways in which relevant stakeholders and partners have been included in the design, development, and implementation of a charter school (NACSA, 2025).

These three concepts are inextricably linked: new charter schools cannot identify and demonstrate responsiveness to families' and communities' needs and aspirations, nor identify sufficient demand, without robust and meaningful engagement with families, community organizations, and other local stakeholders, both in the development phase and throughout the life of the school (NACSA, 2025). Demand will ultimately determine the school's viability (NACSA, 2025).

High-quality authorizing practices rely on requiring intentional community engagement to align schools with community needs, build trust, and ensure accountability. The OEO recognizes that centering the community in decision-making fosters transparency, strengthens school performance, and establishes collaboration with key stakeholders – all pillars of the OEO's core values.

The OEO's application process for new schools requires applicants to provide compelling evidence of community **need, demand, and engagement**. Additionally, applicants must demonstrate that their proposed education model aligns with OEO's priorities and core values, and will likely lead to improved student outcomes for all students. The applicant should actively involve families and the broader community from the start of the application process to ensure the proposed school aligns with local needs and priorities.

Phase I: In the prospectus, the applicant will have an opportunity to provide evidence of need, demand and engagement, with a particular focus on need. Need can be demonstrated by providing a description of the target population and currently available and unavailable educational options. By answering; Which

specific need(s) is the proposed school well-positioned to provide to its target population in ways that are not currently available?

The application should clearly state how the proposed school meets community need(s). The following are examples that demonstrate need.

- Academic: available school within the community demonstrate consistently low performance, reflecting a need for high-quality alternatives (backed by data from multiple sources and including subgroup comparisons).
- Programmatic: a need for more or different educational options than currently exist for the community, including grade levels, instructional models, and/or programmatic and support offerings.
- Access/Availability: Data show an insufficient number of seats in existing schools that deliver strong academic outcomes and/or the type of educational programming that the proposed school will offer (e.g., full enrollment, existing waitlists).
- Demographic: Demographic projections and analysis for the identified community and relevant grade levels show a need for more seats.
- Other: Research-based analysis justifying the need for this particular school in this community at this time (NACSA, 2025)

Phase II: Prior to the submission of the Phase II application, applicants must provide the OEO with at least three weeks' advance notice of the time, date, and location of at least one community listening session to be held between September 9, 2026, and January 10, 2027. Applicants must host at least one meeting in the community of the proposed school, which serves as an opportunity for the school leadership team to engage with the community by sharing information about the proposed school and addressing questions and concerns. In addition, the school should use the information learned from community to answer questions in Section II of the Phase II Application. Evidence of demand or potential demand can include, but is not limited to:

- objective market research;
- statements of interest on social media platforms;
- intent-to-enroll forms or similar commitments by families;
- surveys or other measures of local demand;
- subscribers to listservs and/or followers on social media accounts;
- expected conversion rates of commitments to actual enrollment
- attendance sheets from community engagement sessions;
- relationships with potential feeder schools;
- personalized letters of support from parents specifying if they are from a parent/guardian of age-eligible child(ren) and why they would choose this school; or
- waitlist data at nearby schools or those with similar programs (NACSA, 2025).

In line with best practices, the OEO posts the Phase II application and community engagement information on its website, ensuring transparency.

Phase III Pre-Planning Year: Founding teams are expected to continue to have regular and diverse opportunities for soliciting community feedback and participation during the pre-planning year and after the school has opened.

Capacity Interview

Capacity Interviews are a critical step in the review process, allowing reviewers to assess the founding team's capacities both individually and as a cohesive group with complementary skills, experiences, and perspectives. The Application Review Committee and the OEO will conduct a Capacity Interview with key members of the application team (board/founding team), to be scheduled after the Phase II application submission deadline. The purpose of the capacity interview is to assess the founding team's capacity to successfully launch and sustain the proposed school and to provide further verbal clarification or elaborate on responses within the written application.

Challenge Scenario

Overview: In conjunction with the Capacity Interview, the OEO may identify a Challenge Scenario for the founding team to work through as part of the interview. This exercise allows the OEO to delve deeper into areas of concern specific to the application. The Challenge Scenario can focus on the proposed school's educational model, the experience and capacity of the founding team, or their ability to execute the educational model as planned. Framing the core question as a challenge helps simulate a team's deliberation of the core issues they may face in early development or operation, while reviewers observe their discussion and interactions. Following the discussion, team members share feedback on both their approach and deliberations, providing the OEO and reviewers an opportunity to further assess the team's capacities such as Reflective Learning and Effective Decision Making (NACSA, 2024).

Phase II: Application Submission Requirements

Submission of Application

Applicants must send an electronic copy of the Phase II application including all attachments in PDF versions via email to cynthia.gonzalez@wisconsin.edu. Once an application is received, applicants will be notified if the application is incomplete or will be reviewed by the Application Review Committee.

Due Date

The Phase II New Charter School Application must be submitted via email by January 11, 2027, no later than 5:00 p.m. (CST). No late applications will be accepted. Any application submitted after 5:00 p.m. CST on the last day of the application cycle will be rejected.

Page Limit

The Phase II application may not exceed 75 pages in length. Application strength is measured by the quality of content against the Rubric, not by its length. Applicants are encouraged to be thorough, yet concise. Page limits do not apply to required attachments.

Application Format and Organization

- 8 ½" × 11" page orientation
- 0.5-1" margins on all sides
- 11-12-point font (preferred, Open Sans, 9.5 point font)
- Page numbers, date and name of proposed school in footer on each page
- Attachment must be clearly labeled

Data

Tables, graphs, and any other data provided in the application must be clearly presented, explained, and directly relevant to the text. Any pictures or graphs that contain text within the picture may be less than 11-point font.

Appendices: All appendices must be referenced in the text of the prospectus and clearly labeled.

Required Attachments

- Proposed discipline policy
- Organizational Chart
- Management agreement or other comprehensive service agreement (if applicable)
- New board members whose resumes were not included in the Phase I application
- Board by-laws
- Articles of Incorporation
- Facility MOU or other proof of intent to secure a specific facility (if applicable)
- Revenue and expenditure budget for the first five years of operation and planning year (Applicants must use the five-year budget template provided by OEO)

References:

National Association of Charter School Authorizers (2025). *New School Application Guide*.