



PHASE I
NEW CHARTER SCHOOL
PROSPECTUS APPLICATION
RUBRIC

Office of Educational Opportunity
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Phase I: Prospectus Evaluation Rubric

The Prospectus Evaluation Rubric “Rubric” provides the authorizer and the Application Review Committee with an objective means of determining quality in the charter school proposal. Provides a common language (specific criteria and indicators of quality) for evaluators to draw on throughout the entire application evaluation process. Rubric also provides the application writer with a mechanism for reviewing their work prior to submission.

Opening and maintaining a successful, high-performing charter school depends on having a complete, coherent plan and identifying highly capable individuals to execute it. It is not an endeavor for which strengths in some areas can compensate for material weaknesses in others.

Therefore, to receive a recommendation for approval, the application must maintain a “Meets” rating in **all** sections as determined by consensus of the Application Review Committee. This review model does not use a numeric rating system but relies on each reviewer’s summary judgment on each of the categories.

While it must be realized that there is some element of subjective judgment in evaluating proposals, a proposal can be evaluated on its completeness, responsiveness to criteria, and the integration of innovative ideas into a realistic operation to educate students. Especially important in the chartering process is the effective use of research literature, demonstration of need, demand and engagement, the design and focus of the program's ability to close opportunity and achievement gaps, meeting the priorities and core values of the OEO, and how the proposal integrates organizational structure, budget, and program into an operational whole.

Criteria and indicators of quality are provided for each section of the Prospectus Application.

Rating Characteristics

In general, the following definitions guide evaluator ratings:

Meets: Clear and complete responses to all criteria. Consistently detailed, comprehensive explanations provided, including specific evidence that shows robust preparation. Presents a clear, explicit picture of how the school expects to operate. When applicable, responses connect cohesively to other sections of the prospectus. When applicable, the information/evidence demonstrates a high degree of capacity to implement the proposed program.

Approaches: Responses address most criteria but lack full depth or detail in some areas. The explanation provides adequate information overall but would benefit from additional evidence or specifics in key sections. Some connections between related parts of the prospectus exist but could be strengthened. The information demonstrates basic capacity to implement the proposed program, though certain operational elements may require further development or clarification. Some aspects of school operations are presented in general terms rather than with specific, actionable plans.

Does Not Meet: Unclear and/or incomplete responses to some or all criteria. The response provides partial explanations and lacks meaningful detail or requires additional information in one or more key areas. Responses lack connections to related sections. Responses demonstrate lack of preparation and/or raise substantial concerns about the applicant’s understanding of, or ability to, implement the proposed program/or operate a charter school.

Prospectus Application Evaluator Rubric

PROPOSED SCHOOL NAME:

DATE:

Rating Characteristics

In general, the following definitions guide evaluator ratings:

Meets: Clear, complete, and compelling response to all aspects, demonstrates capacity and potential.

Approaches: Adequate response addressing most criteria, but requires further development in certain areas. Shows basic understanding and capacity.

Does Not Meet: Lacking details, minimal demonstration of understanding or capacity.

OVERALL SECTION RATING

Section I: School Overview	
Section II: Need, Demand & Evidence of Community Involvement	
Section III: Summary of the Educational Program and Staffing	
Section IV: Governance and Organizational Structure	
Section V: Financials	
Section VI: Potential Location of School	
Overall Rating	

Section I: School Overview			
	Does Not Meet	Approaches	Meets
<p>Q1. The response provides a clear, compelling narrative that explains why this specific school is needed for this particular community and why this founding team is positioned to succeed. The response integrates mission/vision, target population/community needs, educational model, and founding team capacity into a coherent rationale.</p> <ul style="list-style-type: none"> • Mission and vision are distinct (mission = purpose/what we do; vision = future impact/what will be) • Makes persuasive case for why school should exist: <ul style="list-style-type: none"> ○ Need is clear: Data/evidence shows gap or unmet need ○ Solution is appropriate: Educational model addresses need ○ Team is capable: Founding team has skills/experience to succeed ○ Reader understands: "This school is needed here, designed appropriately, and likely to succeed with this team" 			
Q2. The response clearly articulates alignment with the OEO core values & new school priorities. See Prospectus Guide for descriptions of each.			
Q3. The response identifies the number of students expected to attend the school each year by grade level and explains the basis for these assumptions. Enrollment projections seem achievable and reasonable based on the assumptions made.			
Q4. For charter management organizations ONLY: response provides a statement outlining the purpose and a brief history of the organization in relation to public education including its experience operating and/or managing charter school(s). Identifies the number of current charter schools managed, their location(s), size, and specific mission/target population. If any were not renewed, or closed for any reason, it provides an explanation.			
Strengths:			
Weaknesses:			
Questions:			
Section Rating:			

Meets: Clear, complete, and compelling response to all aspects, demonstrates capacity and potential.

Approaches: Adequate response addressing most criteria, but requires further development in certain areas. Shows basic understanding and capacity.

Does Not Meet: Lacking details, minimal demonstration of understanding or capacity.

Section II: Need, Demand & Evidence of Community Involvement

	Does Not Meet	Approaches	Meets
Q1. The response clearly describes how founders assessed the need for the school through multiple methods and data sources. The assessment demonstrates that founders conducted systematic research and community engagement to understand families' access (or lack thereof) to quality schools. The response demonstrates founders took a thoughtful, evidence-based approach to determining whether the school is needed, rather than assuming need without research. The assessment provides a credible foundation for school proposal.			
Q2. The response describes how founders have assessed pre-liminary demand for the school and provides assumptions that are being made.			
Q3. The response clearly describes how founders have engaged stakeholders in developing the school and demonstrates that stakeholders have been meaningfully involved in school design. The engagement goes beyond information sharing to include genuine input and collaboration.			
Strengths:			
Weaknesses:			
Questions:			
Section Rating:			

Meets: Clear, complete, and compelling response to all aspects, demonstrates capacity and potential.

Approaches: Adequate response addressing most criteria, but requires further development in certain areas. Shows basic understanding and capacity.

Does Not Meet: Lacking details, minimal demonstration of understanding or capacity.

Section III: Summary of the Educational Program and Staffing

	Does Not Meet	Approaches	Meets
<p>Q1. The response provides a clear, comprehensive overview of the curriculum, instructional design, and guiding educational philosophy, demonstrating how these elements align with the school's mission and are supported by research/evidence. The response differentiates the school from existing options and addresses how the model serves diverse learners.</p> <p>Overall Quality:</p> <ul style="list-style-type: none"> • Educational program is coherent and well-designed • Clear alignment between philosophy, curriculum, instruction, and mission • Strong research/evidence base supporting choices • Meaningful differentiation from existing district options • Thoughtful approach to serving diverse learners, including special education students and ELs • Response demonstrates deep understanding of effective instruction and school design • Reader understands what makes this school unique and how it will serve all students effectively 			
<p>Q2. The response provides a clear, comprehensive strategy for attracting, developing, and retaining staff capable of delivering the educational program with high quality and fidelity. The strategy addresses all three components (attract, develop, retain) and covers school leadership, teachers, and other relevant staff.</p> <p>Overall Quality:</p> <ul style="list-style-type: none"> • All three components (attract, develop, retain) thoroughly addressed • Strategy is comprehensive and realistic • Multiple approaches used in each area (not relying on single strategy) • Clear connection between staffing strategy and educational program fidelity • Plan is feasible given school's budget, timeline, and context • Demonstrates understanding that staff quality is critical to program success • Response shows thoughtful, proactive approach to human capital management 			
Strengths:			
Weaknesses:			
Questions:			
Section Rating:			

Meets: Clear, complete, and compelling response to all aspects, demonstrates capacity and potential.

Approaches: Adequate response addressing most criteria, but requires further development in certain areas. Shows basic understanding and capacity.

Does Not Meet: Lacking details, minimal demonstration of understanding or capacity.

Section IV: Governance and Organizational Structure

	Does Not Meet	Approaches	Meets
<p>Q1. The response provides a clear, concise overview of the school's organizational structure and governance model, showing how the school will be organized and governed.</p> <p>Overall Quality:</p> <ul style="list-style-type: none"> • Overview is brief (not overly detailed) but complete • Governance and organizational structure both addressed • Structure is realistic and functional for proposed school • Clear distinction between board governance role and staff management role • Response demonstrates understanding of effective nonprofit governance and school organizational design 			
<p>Q2. The response provides a clear explanation of how the governance structure ensures effective board composition, manages conflicts of interest, and prepares board members for their roles.</p> <p>Overall Quality:</p> <ul style="list-style-type: none"> • Clear plan for ensuring diverse stakeholder representation and needed expertise on board • Plan to mitigate any potential or perceived conflict of interest and discloses any current potential or perceived conflict of interest that may exist with clear mitigation procedures • Plan for board training and development program covering governance fundamentals, charter school specifics, and healthy board culture • Plan demonstrates understanding of effective nonprofit governance and common pitfalls (conflicts of interest, unclear roles, unhealthy dynamics) • Response shows commitment to strong, ethical, effective governance 			
Strengths:			
Weaknesses:			
Questions:			
Section Rating:			

Meets: Clear, complete, and compelling response to all aspects, demonstrates capacity and potential.

Approaches: Adequate response addressing most criteria, but requires further development in certain areas. Shows basic understanding and capacity.

Does Not Meet: Lacking details, minimal demonstration of understanding or capacity.

Section V: Financials			
	Does Not Meet	Approaches	Meets
Q1. Applicant provides a proposed revenue and expenditure budget for the first five years of operation and planning year, as an attachment . Budget demonstrates alignment to the schools' proposed program model. Budget seems reasonable and demonstrates a strong understanding of charter school finance, demonstrating strong fiscal viability.			
Q2. The response provides a clear explanation of how the school will develop and maintain sufficient financial capacity to succeed. The narrative complements the budget with a strategic context demonstrating financial viability. Overall Quality: <ul style="list-style-type: none"> • School demonstrates and understanding of financial sustainability practices • Risks are acknowledged and addressed (not ignored) • For small schools: Viable plan for operating successfully despite limited revenue • For organization-managed schools: Organization's capacity clearly demonstrated • Response builds confidence in school's financial viability 			
Q3. The applicant provides a detailed and comprehensive description of any existing and anticipated partnerships the school has or will have with community organizations, businesses, or other educational institutions, and the nature, purposes, terms, and scope of services of any such partnerships including any fee-based or in-kind commitments from community organizations or individuals that will enrich student learning opportunities.			
Q4: If applicable, other than those in the founding team, applicants identify the person(s) preparing the full application and describe how any costs associated with developing the full new school application (if any) will be financed.			
Strengths:			
Weaknesses:			
Questions:			
Section Rating:			

Meets: Clear, complete, and compelling response to all aspects, demonstrates capacity and potential.

Approaches: Adequate response addressing most criteria, but requires further development in certain areas. Shows basic understanding and capacity.

Does Not Meet: Lacking details, minimal demonstration of understanding or capacity.

Section VI: Potential Location of School			
	Does Not Meet	Approaches	Meets
Q1. The response describes the proposed geographic location of the school and explicitly noted the rationale for selecting the school location and how it aligns to the educational need, anticipated student population, and the non-academic challenges the school is likely to encounter.			
Q2. The applicant has clearly and reasonably described the steps taken to identify potential school facilities (timeline).			
Strengths:			
Weaknesses:			
Questions:			
Section Rating:			

Meets: Clear, complete, and compelling response to all aspects, demonstrates capacity and potential.

Approaches: Adequate response addressing most criteria, but requires further development in certain areas. Shows basic understanding and capacity.

Does Not Meet: Lacking details, minimal demonstration of understanding or capacity.