

Charter School Petition Evaluation Rubric

INSTRUCTIONS

Evaluators should use this rubric to determine whether a **local** charter school petitioner demonstrates the capacity and readiness to operate a high-quality charter school. This rubric is aligned with the applicable requirements of the Charter Schools Act of 1998, as amended (O.C.G.A §§ 20-2-2060 through 20-2-2071), the requirements applicable to state charter schools as provided by O.C.G.A § 20-2-2084, and the State Board of Education Rules applicable to charter schools.

In addition to the criteria listed, evaluators should use their professional judgment to assess applicant quality and capacity. Evaluations should consider the complete body of evidence provided in the petition, including the written application, capacity interview, requests for additional information, due diligence findings, and other materials pertinent to the evaluation of the charter school applicant. Importantly, evaluators should seek to determine whether the petition **materially satisfies** the expectations outlined in each criterion. This means the petition should demonstrate a clear, coherent, and legally sound plan that aligns with applicable laws and best practices—even if minor omissions or misstatements are present.

Each section of the rubric includes space for evaluators to record their findings. Evaluators should complete both a pre-interview and post-interview rating for each section, along with written responses to the prompts provided. The second rating should be considered a “final” evaluation rating for the section. Additionally, evaluators should complete the Overall Recommendation at the end of the review process. Boxes for written evaluator responses can be expanded to create appropriate space to record findings.

Please note that not all rubric categories or criteria will apply to every petition. **Red headings** indicate criteria that apply **based on the school’s model or operational structure** (e.g., if a school will serve high school grades or partner with an Education Service Provider). Evaluators should complete the rubric based on applicable criteria.

EVALUATION RATINGS

Bulleted criteria define the expectations for how an application and founding team demonstrate that they “Meet the Standard.” Evaluators should rate evidence by applying the following guidance:

Rating	Definition
Meets the Standard <i>Petition is consistent with a high-quality charter school</i>	Evidence is multi-faceted and demonstrates that the application and team members, as a whole, materially satisfy the criteria. If present, deficiencies are minor or technical and do not suggest critical misalignment with applicable laws or best practices.
Approaches the Standard <i>Petition is somewhat consistent with a high-quality charter school</i>	The evidence demonstrates that the application and team members, as a whole (or multiple individuals on the team), meet the criteria in some respects, but are insufficient or incomplete in other respects.



Does Not Meet the Standard <i>Petition is not consistent with a high-quality charter school</i>	The evidence is wholly insufficient or significantly lacking; or opportunity was provided to demonstrate that a given criterion was met, and neither the application nor the founding team provided demonstrative evidence that met the criteria.
---	---

HOLISTIC CRITERIA

In addition to the criteria listed in each section of the rubric, the following qualities should be demonstrated throughout the charter school petition (the application, capacity interview, and any intervening requests for additional information).

- The proposed school's mission, vision, and key design elements of the educational model are consistent through lines 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 capacity 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.



1. MISSION & VISION

Category	Criteria
1.1 <i>Mission & Vision</i>	▪ Vision and mission are clear, student-focused, and compelling. ▪ Performance-based goals and objectives are measurable and aligned with the school's mission and state educational goals.
1.2 <i>Flexibility</i>	▪ Demonstrates understanding of charter flexibility in exchange for accountability. ▪ Explains how academic and organizational innovation will increase student achievement.
Pre-Interview Evaluation	
Area(s) of Strength:	Area(s) of Weakness:
Interview Questions:	
Initial Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard	
Post-Interview Evaluation	
Final Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard	
Rating Rationale:	

2. ACADEMICS

Category		Criteria
2.1	<i>Model & Instructional Strategies</i>	▪ Presents a clear and thorough description of the school's educational model, instructional methods, and innovative practices. ▪ Program features are cohesive and align with the school's mission. ▪ Presents plausible reasoning and evidence to support how the educational program will increase student achievement in the selected community.
2.2	<i>Curriculum</i>	▪ Provides a specific and complete description of curricular choices aligned with the school's academic goals. ▪ Identifies or outlines a plan to select and/or develop curriculum aligned to Georgia Standards. ▪ If the curriculum is developed in-house, the petition provides an appropriate development plan detailing responsible parties, required resources, and a clear timeline with key stages.
2.3	<i>Implementation of Educational Program</i>	▪ Details a comprehensive plan to implement the model and instructional strategies; the implementation plan is consistent with the model. ▪ Proposed budget and staffing model (including teacher recruitment plans and qualifications, PD plans, and compensation structures) support programmatic needs.



		Teacher-to-student ratios are appropriate for the proposed model.
2.4	<i>Monitoring Student Achievement</i>	- Describes how the current baseline standard of achievement will be determined. - Describes how the school will obtain and use student baseline and iterative performance data to drive or tailor instructional improvements. - Assessments are aligned with the Georgia Standards of Excellence.
2.5	<i>Statewide Assessments</i>	Describes how the school will coordinate with the local school system to participate in statewide assessments.
2.6	<i>Gifted and Talented Program</i>	Articulates processes for identifying and serving students identified as gifted and talented.
2.7	<i>High School Program</i>	If the school will serve a high school grade band: - Academic program aligns with GaDOE graduation requirements. - Articulates a plan to pursue accreditation and comply with career readiness obligations.
2.8	<i>Virtual/Hybrid Learning</i>	If the school will offer virtual/hybrid learning: - Presents a viable and sustainable plan for promoting student engagement and ensuring the integrity of student work product and assessments. - Presents evidence that all elements of the school's academic program, including services for English Learners and students with disabilities, can be implemented with fidelity if delivered in a virtual environment. - Presents a comprehensive plan for ensuring reliable and equitable student access to online coursework.
Pre-Interview Evaluation		
Area(s) of Strength:		Area(s) of Weakness:
Interview Questions:		
Initial Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Post-Interview Evaluation		
Final Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Rating Rationale:		

3. COMMUNITY NEED, DEMAND, & ENGAGEMENT

Category		Criteria
3.1	<i>Community Need & Demand</i>	- Provides clear, data-driven evidence of community need and demand for the school's model. - Justifies how the school offers a unique academic option in the proposed attendance zone.



3.2	<i>Community Engagement</i>	▪ Demonstrates substantive and meaningful community involvement in petition development. Community feedback has clearly informed the development of the school's model. ▪ Outlines plans to meaningfully engage the community once operational. ▪ Proposed partnerships with existing schools, educational programs, businesses, or nonprofit organizations are supported by evidence of commitment (LOIs, MOUs, etc.).
3.3	<i>Enrollment</i>	▪ Presents realistic enrollment projections and a growth model supported by evidence of demand. ▪ Recruitment and marketing plans support meeting enrollment targets. ▪ Enrollment policies, including weighted lottery policies and enrollment priorities, comply with Georgia law.
Pre-Interview Evaluation		
Area(s) of Strength:		Area(s) of Weakness:
Interview Questions:		
Initial Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Post-Interview Evaluation		
Final Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Rating Rationale:		

4. GOVERNANCE

Category		Criteria
4.1	<i>School Oversight</i>	▪ School governance is solely vested in the governing board. ▪ The governing board's duties and responsibilities are in the following areas of oversight, as opposed to the day-to-day operations of the school: ○ Approving the budget, managing resource allocation, and generating fundraising revenue; ○ Personnel decisions (primarily school leader selection, evaluation, and termination); ○ Establishing and monitoring the achievement of school improvement goals; and ○ Curriculum and high-level operations (including policies, legal and regulatory compliance). ▪ Describes how the governing board will monitor the school's academic, financial, and operational performance. If the school will work with an Education Service Provider (ESP):



		▪ Presents a comprehensive plan for board oversight of ESP performance. ▪ Demonstrates that the governing board operates independently from its selected ESP to the extent necessary to hold the provider accountable for performance.
4.2	<i>Governing Board Structure</i>	▪ Bylaws are comprehensive, reasonable, legally compliant, and aligned with the application narrative. ▪ The board's structure – including its committees, leadership roles, and meeting schedule – is clearly defined and supports effective governance. ▪ Includes a clear plan for board recruitment and training.
4.3	<i>Governing Board Capacity</i>	▪ Board members demonstrate an understanding of and ability to meet the demands of board membership. ▪ Board members have the necessary skills and experience to govern effectively; there are no critical gaps in board member expertise. ▪ Board members do not present any conflicts of interest.
4.4	<i>Stakeholder Engagement</i>	▪ Demonstrates an understanding of transparency obligations, including Open Meetings requirements. ▪ Indicates a willingness and capacity to appropriately address stakeholder complaints. ▪ Demonstrates commitment to ongoing stakeholder engagement in school governance.
Pre-Interview Evaluation		
Area(s) of Strength:		Area(s) of Weakness:
Interview Questions:		
Initial Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Post-Interview Evaluation		
Final Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Rating Rationale:		

5. OPERATIONS

Category		Criteria
5.1	<i>Employment</i>	▪ Demonstrates understanding of employer obligations under state and federal law (FMLA, FSLA, anti-discrimination law, etc.). ▪ The school's staffing plan, including its organizational structure, supports effective management of school functions.



5.2	<i>Student Discipline</i>	▪ Outlines appropriate plans for progressive student disciplinary measures, supports, and/or programs. ▪ Petition is consistent with O.C.G.A. § 20-2-730 et seq., which limits the use of corporal punishment in the classroom to specified conditions. ▪ Petition is consistent with Ga. Reg. 160-4-7-.10, which defines how schools may discipline students with disabilities.
5.3	<i>Grievances & Complaints</i>	▪ Provides appropriate rules and procedures for addressing grievances and complaints from students, parents, and teachers.
5.4	<i>ESP Partnership</i>	If the school will work with an Education Service Provider (ESP): ▪ Governing board members conducted sufficient due diligence to establish that the ESP has the appropriate financial resources, educational services, and managerial experience to provide contracted services. ▪ The governing board retained independent legal counsel to review and negotiate the proposed ESP agreement. ▪ It is evident that the charter school governing board will maintain decision-making authority in personnel decisions, financial decisions, curriculum and instruction, resource allocation, establishing and monitoring the achievement of school improvement goals, and school operations. ▪ The proposed ESP agreement provides a clear and detailed description of the services to be provided by the ESP. ▪ If applicable, the ESP's educational services align with the school's proposed model. ▪ Proposed fee(s) for services are reasonable, support the school's operational sustainability, and are clearly outlined in the proposed agreement. ▪ In the case of termination of the ESP agreement, the school would be able to sustainably continue school operations.
5.5	<i>Additional Student Services</i>	▪ If the school will not provide transportation, before/after school programming, or a nutrition program, the petition provides a compelling explanation why this will not present a barrier to enrollment.
5.6	<i>Facility</i>	If the school will have a brick & mortar facility: ▪ Presents a comprehensive and practical plan to identify, finance, and renovate a facility. ▪ Proposed facility meets the school's programmatic needs. ▪ Terms of purchase or lease agreements are reasonable and financially sustainable. ▪ Purchase or lease agreement is consistent with the proposed budget. ▪ Presents a viable plan to secure a Certificate of Occupancy, if not yet secured.
Pre-Interview Evaluation		
Area(s) of Strength:		Area(s) of Weakness:
Interview Questions:		
Initial Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Post-Interview Evaluation		



Final Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard

Rating Rationale:

6. SERVICES FOR SPECIAL POPULATIONS

Category		Evaluation Criteria
6.1	<i>Students with Disabilities</i>	▪ Petition comprehensively describes the school's practices and procedures related to: ○ Evaluating and identifying students with disabilities; ○ Developing, reviewing, and revising Individualized Education Programs (IEPs); ○ Integrating special education into the general education program; ○ Ensuring that the school facility meets the requirements of other related laws, including the Americans with Disabilities Act (ADA) and Section 504; ○ Addressing student discipline; ○ Handling programming disputes with parents; ○ Ensuring confidentiality of special education records; ○ Purchasing services from special education vendors or contracting with the local district to provide a continuum of special education services; and ○ Securing technical assistance and training. ▪ Clearly describes how students with disabilities will directly benefit from the school's unique and innovative programming.
6.2	<i>English Learners</i>	▪ Discusses how English Learner (EL) students are identified and assessed, including assessment frequency and parent notification of program placement. ▪ Provides a detailed description of the ESOL instructional program.
Pre-Interview Evaluation		
Area(s) of Strength:		Area(s) of Weakness:
Interview Questions:		
Initial Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Post-Interview Evaluation		
Final Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Rating Rationale:		



7. FINANCE

Category	Evaluation Criteria
7.1 <i>Legal Compliance & Internal Controls</i>	▪ If identified, CFO's credentials comply with SBOE Rule 160-4-9-.05. ▪ Provides evidence of clear and defined internal controls. Details the appropriate segregation of duties. ▪ Policies and procedures particularly ensure the following: ○ Compliance with O.C.G.A. § 20-2-2074, which states that the CFO cannot also serve as CEO or in any other position at the school; and ○ Clear delineation of financial management and oversight duties between the school-level administration and the governing board. ▪ Governing board treasurer has appropriate education and experience to perform financial oversight. Overall, qualifications or experience on the board are sufficient to oversee financial management, fundraising and development, accounting, and internal controls. ▪ Demonstrates an understanding of and an ability to comply with Governmental Accounting Standards Board (GASB) Statements and Interpretations, which constitute Generally Accepted Accounting Principles (GAAP) for financial reporting. ▪ If using a third-party to provide financial services, the governing board demonstrates an understanding of the fee structure to be charged and has the capacity to hold the third-party provider accountable for financial information provided to the school.
7.1 <i>Financial Plan (Budget)</i>	▪ Overall, the budget is viable, complete, and consistent with the school's academic and operational plans. Decisions made in the financial plan are reasonable and supported with evidence when needed. Cash Flow: ▪ Cash flow projections from the 5-year budget match the Year 0-2 cash flow projection. ▪ Presents a positive cash balance for years 1-5 and a surplus or positive cash balance at the end of year 5. Revenue ▪ Addresses how the school will fund planning and start-up operations before receiving funding from state allotments. ▪ Grant/donation/loan or other additional sources of revenue outside of state funds are guaranteed or substantiated by documentation. ▪ Provides a practical and reasonable contingency plan to meet financial obligations in the event of low revenue or unanticipated events. Expenses ▪ Based on appropriate revenue, the budget includes realistic expenses supported by documentation, assumptions, or details that align with the school's academic and operational needs and priorities. ▪ Personnel costs are consistent with the anticipated teacher-to-student ratio. ▪ Personnel salaries and compensation details are reasonable and competitive; the budget includes costs for Teacher Retirement System (TRS) or other retirement plan, as well as costs for benefits. ▪ Itemizations of expenses are reasonable and explained. ▪ Facility costs are less than 15% of total expenses for at least 3 out of 5 budget years. ▪ If applicable, ESP fees are no more than 10% of total revenue. Loans



		- Potential debt agreement(s) detail repayment in clear and reasonable terms. Budget demonstrates responsible debt ratios. - Budget includes repayment of debt service on loans.
7.3	<i>District Relations</i>	Explains how the charter school will utilize the local district for fiscal management or other services and, if so, the level of autonomy the school will have over budgets and expenditures.
Pre-Interview Evaluation		
Area(s) of Strength:		Area(s) of Weakness:
Interview Questions:		
Initial Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Post-Interview Evaluation		
Final Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard		
Rating Rationale:		

8. LOCAL DISTRICT CONSIDERATIONS

Local authorizers may use the space below to outline district priorities and/or goals related to the public interest that are not captured in other sections of the evaluation rubric. Criteria in this section must align with statutory requirements applicable to charter school petition review, as provided in State Board Rule 160-4-9-.05. Add or delete table rows as needed.

Category		Criteria
8.1		
8.2		
8.3		
8.4		
Pre-Interview Evaluation		



Area(s) of Strength:	Area(s) of Weakness:
Interview Questions:	
Initial Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard	
Post-Interview Evaluation	
Final Rating: ☐ Meets the Standard ☐ Approaches the Standard ☐ Does Not Meet the Standard	
Rating Rationale:	



OVERALL EVALUATION

After completing all steps of the review process, including the capacity interview, evaluators should complete the overall evaluation. Consider all evidence pertinent to the sections above, as well as the Holistic Criteria on page 2. Expand the space for the rationale narrative as needed.

Recommendation:

☐ Approval

☐ Denial

Recommendation Rationale: