

## Detailed Business Plan Submission Criteria

Rater: \_\_\_\_\_ Date: \_\_\_\_\_

Each detailed business plan will be evaluated based on the inclusion of all elements required within each individual section. Special attention should be paid to the **bolded** words within each section.

Section	Detailed Business Plan	Y	N	N/A
<b>I.</b>	<b>Organizational Chart – An organizational chart is included that illustrates the structure of the organization by showing the different levels of management.</b>			
	○ The <b>organizational chart</b> uses <b>graphics</b> to identify <b>key positions</b> in the organization and <b>reflects on the operation and flow of communication</b> from the <b>corporate level to school operations</b> .			
	○ The <b>narrative explains the organizational chart</b> and <b>clearly describes the reporting structure</b> for each level of the corporation. For key personnel, the narrative includes <b>position titles</b> , rather than names, and <b>specific responsibilities</b> .			
<b>II.</b>	<b>Sustainability</b>			
<b>A.</b>	<b>Organization’s Fiscal Viability</b>			
Part I	○ <b>The budget plan</b> is for the <b>next three years of operation</b> . <b>The budget plan accounts for any major changes in or anticipated by the organization and identified in the business plan</b> . The budget plan <b>includes completed budget templates</b> (Attachments B and C) for <b>anticipated revenue and expenditures</b> for the next three years. If necessary, the budget plan reflects costs associated with implementing the performance management plan and is aligned to budget expenditures identified in the performance management plan submitted.			

Section	Detailed Business Plan	Y	N	N/A
Part 2	<ul style="list-style-type: none"> <li>○ A <b>narrative clearly describes the structures and systems</b> in place in the organization to ensure fiscal viability. The following information is included:               <ul style="list-style-type: none"> <li>● <b>Accounting procedures</b></li> <li>● <b>Process used in fiscal decision-making</b></li> <li>● <b>Site-level personnel with fiscal authority</b></li> <li>● <b>The organization’s fiscal viability related to fundraising</b></li> <li>● <b>Philanthropic support from the community</b></li> </ul> </li> </ul>			
<b>B.</b>	<b>Strength and Stability of the Governing Body</b>			
Part 1	<ul style="list-style-type: none"> <li>○ The <b>list of current governing body members identifies their area of expertise</b> (e.g., financial, legal, education, etc.) <b>or role filled</b> (e.g., parent, teacher, business member, etc.).</li> </ul>			
Part 2	<ul style="list-style-type: none"> <li>○ <b>Narrative describes governing body member recruitment/selection and development.</b> The <b>training/orientation process</b> that is provided to all school governing body members is included in the description.</li> </ul>			
Part 3	<ul style="list-style-type: none"> <li>○ <b>Narrative clearly outlines the governance structure and organization of the school’s governing body.</b> The narrative includes a <b>description of the role, responsibilities, and mandated obligations</b>, including Open Meeting Law and policy decisions, of the school’s governing body. The narrative also describes the <b>structures and systems in place for decision-making</b> at the governing body level.</li> </ul>			
Part 4	<ul style="list-style-type: none"> <li>○ Complete description of the role of the <b>governing body in monitoring the school’s academic performance</b> is provided.</li> </ul>			
<b>C.</b>	<b>Strength and Stability of the Charter Holder</b>			
Part 1	<ul style="list-style-type: none"> <li>○ A complete <b>list of current officers, directors, managers or partners</b> of the corporation is presented.</li> </ul>			
Part 2	<ul style="list-style-type: none"> <li>○ <b>Description of the role and responsibilities of the charter holder</b> includes a <b>narrative that clearly outlines the function of the charter holder</b> and indicates if the <b>charter holder is the same as the school’s governing body.</b></li> </ul>			
Part 3	<ul style="list-style-type: none"> <li>○ Complete description of the role of the <b>charter holder in monitoring the school’s academic performance</b> is provided.</li> </ul>			
<b>III.</b>	<b>Succession Plan</b>			
<b>A.</b>	<ul style="list-style-type: none"> <li>○ <b>Succession plan</b> for the <b>charter holder describes the replacement of officers, members, partners, or board</b> in the event of retirement, resignation, or other circumstances.</li> </ul>			

Section	Detailed Business Plan	Y	N	N/A
B.	<ul style="list-style-type: none"> <li>○ <b>Succession plan</b> for the <b>school’s instructional leadership team</b> includes:               <ul style="list-style-type: none"> <li>• Development of a clear career course at the school (e.g., teacher to master teacher to assistant principal, etc.)</li> <li>• Creation or refinement of incentive plans (e.g., merit pay, flex hours, etc.)</li> <li>• Ongoing professional development</li> <li>• High standards for hiring qualified personnel</li> <li>• Appropriate resources to bring in new personnel</li> </ul> </li> </ul>			
IV.	<b>Facilities Plan</b>			
	○ A detailed description of the <b>facilities plan, by site</b> , includes any <b>plans for expansion</b> .			
V.	<b>TOTAL (I, II, III and IV)</b>	<b>Y</b>	<b>N</b>	<b>N/A</b>
	<b>14 Possible “Yes” Items</b>			