



**OFFICE of
EDUCATION INNOVATION**

Charter School Application

For new and existing operators seeking to start or replicate
a Mayor-Sponsored Charter School

Spring 2026

Office of the Mayor
2501 City-County Building
200 East Washington Street
Indianapolis, Indiana 46204
Telephone: 317.327.3601

Introduction

Charter schools are secular, tuition-free public schools that are freed from many of the regulations governing traditional schools. In exchange for controlling their own curricula, staffing, organization, and budgets, charter schools must meet the highest performance standards. The Office of Education Innovation serves more than 19,000 students in 45 charter schools across Center Township and Marion County.

The application process designed by the Mayor's Office and aligned with best practice from the National Association of Charter School Authorizing is intended to review proposed charter schools closely. The Mayor's Office will only grant charters to those applicants who seek to establish effective and equitable education programs with the highest standards for academics, finances, and governance. For existing operators looking to replicate their model in a different location or for a different grade configuration, the Mayor's Office will only grant charters to those applicants who have proven their success in academics, operations, and management in a current Indianapolis-based charter school and demonstrate demand for the model elsewhere.

The Mayor and City-County Council have appointed the Indianapolis Charter School Board. The Indianapolis Charter School Board has the ultimate decision-making authority when granting charters through the Mayor's Office. More information about [public hearings](#) and the [Indianapolis Charter School Board](#) can be found on our website.

The Mayor's Office of Education Innovation has gone to great lengths to create an open and transparent application review process based on the explicit criteria set forth in this application packet. However, other factors may also influence final chartering decisions. These factors may include recent dynamics of school openings and closings within the landscape, the composition of the applicant pool relative to charters already granted, and the diversity of the pool relative to such attributes as school size, geographic location, and educational approach.

Applicants who should use this application are those who are applying to open a new charter school or a private school applying to convert to a charter. Current Mayor-sponsored charter schools applying to replicate their school(s) should complete this application and ensure they include the sections marked for replication. Applicants who are seeking an Innovation agreement with Indianapolis Public Schools should complete this application and ensure they include the section marked for Innovation agreement. Existing charter schools under other Indiana authorizers who would like to transfer to the Mayor's Office should use the Transfer Application on OEI's [website](#).

Required questionnaires, templates and forms can be found in this document and the Charter Achievement Portal, which you will gain access to after submitting a letter of intent. Finally, for your reference, internet links to the state charter school statute and other helpful resources are attached. If you need assistance, please contact the Senior Governance Analyst, Brielle Petty, at 317-327-7458 or at brielle.petty2@indy.gov.

Application Overview

Applicants who are new or existing operators seeking a new charter from the Mayor of Indianapolis **must**:

- Submit a **Letter of Intent** using [this form](#). *Applicants may submit their Letter of Intent at any time prior to the deadline to be considered for the current round. Instructions included with linked form.*
- Submit an **Eligibility Determination form** (*new operators or non-mayor-sponsored charter school operators only*) using [this form](#). Instructions are provided.
- Submit a **Prospectus**
- Submit a **Request for Clarification**, if applicable
- Participate in an **interview** with OEI staff and external evaluators
- Participate in a **public meeting** of the Indianapolis Charter School Board
- Receive an **invitation** to submit a Full Application. *This determination will be based on a detailed review of the proposed school.*
- Submit a **Full Application**
- Participate in a public meeting of the Indianapolis Charter School Board and receive a **vote of approval** from a majority of members of the Indianapolis Charter School Board.

Applicants who operate existing mayor-sponsored schools seeking to replicate a current model **must**:

- Submit a **Letter of Intent** using [this form](#). *Applicants may submit their Letter of Intent at any time prior to the deadline to be considered for the current round.*
- Submit a **Replication Application, Budget Template, and Replication Workbook** through the online Charter Achievement Portal.
- Submit a **Request for Clarification**, if applicable.
- Participate in an **interview** with OEI staff.
- Participate in a **public meeting** of the Indianapolis Charter School Board and receive a **vote of approval** from a majority of members of the Indianapolis Charter School Board.

The Mayor's Office has discretion over the replication process, *including whether participation in a prospectus round is required*. This determination will be based on a review of the proposed school. Additionally, OEI will conduct due diligence on the applicant's existing schools. Pursuant to IC 20-23-3-4 (d), the Mayor's Office will look for evidence of the existing school's success and the applicant's capacity to replicate the school model.

The Mayor's Office reserves the right to reject or seek additional information on prospectuses or full proposals that do not follow the above procedure and/or lack any material sections or documents listed in the explanations below.

Spring 2026 Cycle Dates and Deadlines

- **Nov. 12, 2025:** Spring 2026 Application Posted
- **Dec. 12, 2025:** [Letter of Intent and Eligibility Determination forms](#) due to OEI by noon
- **Jan. 2, 2026:** Orientation sessions complete
- **Feb. 23, 2026:** Prospectus or Replication Application due to OEI by noon
- **March 23, 2026:** OEI sends Initial Feedback Memo and Request for Clarification to Applicant, if applicable
- **March 30, 2026:** Request for Clarification responses due to OEI by noon
- **April 6 - April 17, 2026:** Capacity Interviews will be held. OEI will reach out to schedule specific two-hour interviews once proposals are submitted.
- **April 28, 2026:** Indianapolis Charter School Board Prospectus/Replication Application Hearing
- **May 18, 2026:** Full Application due to OEI by noon
- **June 23, 2026:** Indianapolis Charter School Board Full Application Hearing

All document submissions will occur through the Charter Achievement Portal (CAP). Once the letter of intent is submitted, OEI will be in touch about how to access the CAP for the rest of the application process.

Notice of Disclosure

All information submitted as part of the application shall be subject to the Indiana Access to Public Records Act (IC 5-14-3)(the "Public Records Act") and subject to disclosure to the public there under, including disclosure to the media. In the event that it is the applicant's position that certain information submitted as part of the application falls within an exception to disclosure under the Public Records Act, the applicant must, at least five (5) business days prior to submitting any application materials, consult with the City of Indianapolis Public Access Counselor. The City of Indianapolis Public Access Counselor may, if requested by the applicant, issue a written advisory opinion in response to such request. If the City of Indianapolis Public Access Counselor issues an opinion supporting the applicant's position, then any such information contained in the application that is considered non-disclosable must be clearly identified in the application as confidential. The application must further be accompanied by (a) a written statement specifying the particular exception or exceptions to disclosure under the Public Records Act applicable to the information sought to be exempted from disclosure, and (b) the written opinion from the City of Indianapolis Public Access Counselor that supports the applicant's position that the information is exempt from disclosure under the Public Records Act.

The applicant acknowledges that if the foregoing procedure is not followed, and a proposal is submitted, all information shall be subject to disclosure to the public unless the City determines that it must withhold from disclosure certain information in the proposal pursuant to the Public Records Act. Each applicant, by the submission of a proposal, acknowledges its understanding that all proposal materials are subject to disclosure under the Public Records Act and may be subject to review and copying by the public. Each applicant and its representatives, employees, and agents acknowledge and agree that the Mayor's Office, the Mayor's Charter Schools Advisory Board and any official, agent, employee or representative of the City of Indianapolis shall not be held liable or legally responsible in any way for any such disclosure pursuant to the Public Records Act, and such parties hereby waive any rights to redress or claims of actions pursuant to any such disclosure.

Application Process and Components

Step 1: Applicant submits Letter of Intent and Eligibility Determination form

The Letter of Intent (LOI) provides formal notice to the Office of Education Innovation regarding an applicant's intentions to submit a Prospectus and Full Application to open a school in Fall 2027 or thereafter.

All applicants who intend to submit a Prospectus and Full Application during the Spring 2026 charter application cycle must submit a Letter of Intent by 12 p.m., Dec. 12, 2025, to be eligible to submit a Prospectus.

The Applicant Eligibility Determination is a review process required for all applicants who are new operators or non-mayor-sponsored charter school operators seeking to submit a Prospectus and Full Application. Any organization or individual may become eligible to submit a charter application by meeting specific eligibility requirements as detailed in Indiana Code Title 20. Education. To demonstrate the charter applicant has met all requirements to submit a Prospectus and Full Application, the eligibility determination forms must be submitted by 12 p.m., Dec. 12, 2025, as PDFs in an email to the Senior Governance Analyst, Brielle Petty at brielle.petty2@indy.gov.

After submitting the Letter of Intent and after OEI determines applicant eligibility, OEI will be in touch about next steps to access and complete the Prospectus through the Charter Achievement Portal (CAP). At this point, OEI will also schedule a brief meeting with the applicant to review the application process and address any logistical or procedural questions.

Step 2: Applicant submits a Prospectus or Replication Application

The Prospectus is a preliminary application that provides an overview of the proposed new charter school. It provides the applicant the opportunity to share the programmatic features of the school and how it will address the needs of the students in which it seeks to serve. The prospectus is due by the deadline listed above to the Charter Achievement Portal (CAP).

The Office of Education Innovation staff will perform a preliminary screening to identify prospectuses that are complete and in compliance with Indiana state law. If a prospectus is not complete, is not in compliance with Indiana law or the guidelines set forth herein, or otherwise determined not to be in the best interest of the City of Indianapolis, the Mayor's Office reserves the right to reject that prospectus. In the case of a rejected prospectus, the Mayor's Office will provide the applicant with a written reason for the rejection.

The prospectus will be reviewed and evaluated by the Mayor, OEI staff, the Indianapolis Charter School Board, and external reviewers, as needed. In the event that the prospectus is approved, an invitation will be extended to the applicant to submit a full charter application.

The replication application (a proposal from an organizer to establish a charter school per IC 20-24-1-8) provides a comprehensive description of the school from an academic, operational, and fiscal perspective as well as a review of prior school performance and the organizer's capacity to replicate. The applicant is required to demonstrate proficiency to a series of questions throughout the application template. Responses are expected to clearly articulate an understanding regarding the functions needed to fulfill the responsibility of planning, opening and operating a public charter school.

The replication application must be submitted to CAP and received by the Office of Education Innovation by the above deadline. Applications will be reviewed by the Office of Education Innovation and Indianapolis Charter School Board.

Step 3: Initial Feedback Memo and Request for Clarification sent to Applicant

After a committee of internal and external reviewers read the prospectus or replication application, OEI will create an initial feedback memo and issue a request for clarification to the applicant. The purpose of the initial memo is to provide applicants with feedback on their Prospectus or Replication Application submission. The request for clarification, embedded in the feedback memo, is provided to applicants for the purpose of communicating any questions or clarifications that the OEI team requires regarding the submission prior to the capacity interview. Applicants have the opportunity to respond to the request in writing. All requests for clarification will be sent to applicants by the deadline listed above. Applicants will have about a week to respond.

Step 4: Capacity Interviews

Following the submission of the request for clarification, the Office of Education Innovation and external reviewers will conduct a capacity interview with the prospectus applicant team, in which we will ask extended and clarifying questions to learn more about the assembled team's ability to respond to likely challenges and understand the decision-making process of the board.

Applicants that reach this part of the process will be provided proper notice of the capacity interview time, date, and location by a member of the OEI team. Due to the importance of this component of the process, we require that the board chair, school leader, board treasurer, and CFO (if applicable) are present at the interview at a minimum. Capacity interviews are approximately two-hours.

Consultants, advisors, back-office service providers or ESP representatives shall not be present for the interview, as the purpose of the capacity interview is to determine the capacity of the applicant team. Consultants, advisors, back-office service providers and ESP representatives are considered vendors, and as a result must be managed by the board and/or school leadership. When assembling the individuals to attend the capacity interview, it is important to include individuals that can collectively and individually speak in detail about the academic, organizational, and financial plans of the proposed school. It is important that there is a shared voice amongst the applicant team, and no single person is responding to all questions.

The interview will serve as a discussion and Q&A session on the strengths and weaknesses of the prospectus. Applicants should be prepared to speak in detail about their plans, including those regarding academic model, budgets, board rosters, need and demand for the proposed school, as well as its potential location. The interview might also include questions about how schools and boards would handle specific scenarios or problems that could arise in their first year of operation, or similar performance tasks.

Interviews will take place during the week listed above, though OEI staff will reach out about four to six weeks prior to schedule the specific two-hour window. Interviews will be held at the City-County Building.

Step 5: Indianapolis Charter School Board Meeting

The Indianapolis Charter School Board will hold a public hearing where the applicant and OEI staff present the prospectus to the board. Applicants will have 10 minutes to make their presentation. All members of the applicant team may be present during the public hearing, but there may be up to three presenters per applicant team. The presentation should provide at minimum, an overview of the proposed school, desired location, proposed grade levels, and a high-level overview of the instructional model. The presentation may be in the form of a PowerPoint, but it is not required. All presentations must be submitted ahead of time to the OEI team.

Then, the board conducts a Q&A and accepts public comment – both in-person at the hearing, and in the weeks prior, using our [online form](#).

More information about [public hearings](#) and the [Indianapolis Charter School Board](#) can be found on our website.

Unless OEI determines a prospectus round is needed, applicants seeking replication will participate in one hearing of the Indianapolis Charter School Board, which could be held during the typical Prospectus or Full Application time, to be determined by OEI. At that hearing, the Indianapolis Charter School Board will make final chartering decisions.

Step 6: Recommendation to Mayor

After careful review and feedback from the Indianapolis Charter School Board, the Director of OEI will present recommendations to the mayor regarding the prospectus applicants. The mayor will then make a final decision as to whether the applicant should be invited to submit a full application.

Step 7: Selected applicants submit a Full Application

The full application (a proposal from an organizer to establish a charter school per IC 20-24-1-8) provides a comprehensive description of the school from an academic, operational, and fiscal perspective. The applicant is required to demonstrate proficiency to a series of questions throughout the application template. Responses are expected to clearly articulate an understanding regarding the functions needed to fulfill the responsibility of planning, opening and operating a public charter school.

The Full Application must be submitted to CAP and received by the Office of Education Innovation by the above deadline. Full Applications will be reviewed by the Office of Education Innovation and Indianapolis Charter School Board.

Step 8: Indianapolis Charter School Board Meeting and Final Recommendation

The Indianapolis Charter School Board will hold a second public hearing to make final chartering decisions, fulfilling responsibilities under IC 20-24-2.3-4. The applicant and OEI staff present the full application to the board. Applicants will have 10 minutes to make their presentation. All members of the applicant team may be present during the public hearing, but there may be up to three presenters per applicant team. The presentation should provide at minimum, an overview of the proposed school, desired location, proposed grade levels, and a high-level overview of the instructional model. The presentation may be in the form of a PowerPoint, but it is not required. All presentations must be submitted ahead of time to the OEI team.

Then, the board conducts a Q&A and accepts public comment – both in-person at the hearing, and in the weeks prior using our [online form](#). Pursuant to IC 20-24-3-9, OEI will notify all applicants of acceptance or denial, and decisions on proposals will abide by the required 75-day response window.

The final recommendation from the team will be provided to the applicant once the Indianapolis Charter School Board has voted on each application submission.

Please note that OEI reserves the right to determine when applicants who have received charter approval may begin the pre-opening process. This could differ from the applicant's proposed opening date and be influenced by such factors as available facilities, restart placement decisions, and other recent dynamics in the charter landscape that reduce the likelihood a school would launch successfully. OEI will communicate with applicants to determine pre-opening timing in the months following a charter approval.

More information about [public hearings](#) and the [Indianapolis Charter School Board](#) can be found on our website.

Instructions for the Letter of Intent

Purpose

The Letter of Intent (LOI) provides formal notice to the Office of Education Innovation regarding an applicant's intentions to submit a Prospectus and Full Application to open a school in Fall 2027 or thereafter.

Process

All applicants who intend to submit a Prospectus and Full Application during the Spring 2026 charter application cycle must submit a Letter of Intent through the [online form submission](#) by 12 p.m., Dec. 12, 2025, to be eligible to submit a Prospectus. Applications from applicants who do not submit a letter of intent by 12 p.m., Dec. 12, 2025, will not be accepted.

Guidance

The information below is provided to support applicants in successfully completing the Letter of Intent.

The Office of Education Innovation accepts applications from five types of applicants, which must be indicated on the LOI:

- A **new design applicant** is proposing a school model independent from a third-party manager or existing regional or national charter network for a new school that has not previously existed. This could be proposed by a new or existing operator.
- An **existing design applicant** is one that is proposing to (a) convert a private school to a charter school, or (b) contract with an Educational Service Provider that will provide the academic program. The Mayor's Office will conduct due diligence on the design's existing schools. The Mayor's Office will look for evidence of the existing school's success and the applicant's capacity to replicate the school model or to convert from a private school to a charter school. A plan to implement a specific program, such as a widely used curriculum for a particular subject area, does not categorize an applicant as an existing design applicant. In addition, the applicant must show that individuals or organizations that have operated similar schools will be deeply involved in the creation of the proposed school. This could be proposed by a new or existing operator.
- A **replication applicant** is an existing operator in the mayor's portfolio that is looking to replicate an existing school, but in a different location or for another grade configuration.
- A **transfer applicant** is an existing operator with a charter school under another Indiana authorizer who would like to transfer that school to the Mayor's Office.
- A **restart applicant** is one seeking an Innovation Restart agreement with Indianapolis Public Schools. If an applicant is planning to pursue another type of Innovation Network Partnership, that should be disclosed as well.

Legal Name of Organization Applying for the Charter:

In order to apply to become a charter school authorized in Indiana, an applicant shall meet the requirements of an "organizer" as detailed in Indiana Code Title 20. Education § 20-24-1-7, which are as follows:

- The organizer must be a nonprofit corporation that is incorporated or registered in Indiana;
- The organizer must be recognized by the Internal Revenue Service to be tax exempt and maintains such tax-exempt status; *(This may be pending during the application process but must be final prior to the first day of student instruction unless express written permission is granted by the Director of Charter Schools.)*
- The organizer must have an independent board whose members have been elected or selected under the organizer's application and that has entered into a contract under this article to operate a charter school.

Education Service Provider:

"Education service provider" means a for-profit education management organization, nonprofit charter management organization, school design provider, or any other partner entity with which a charter school intends to contract for educational design, implementation, or comprehensive management as stated in Indiana Code Title 20. Education § 20-24-1-6.1

Proposed School Location:

If you have an exact building address of your proposed school location, be sure to include this in the LOI. If you do not have an exact building address, provide a narrative description of the location where you seek to locate. Be sure to include neighborhoods, community names, and any other information that allows us to better understand your plan.

Target Student Population:

Describe the anticipated student population you seek to serve through the approval of the proposed school. Explain how the intended student population is representative of the demographics of the location. Provide rationale for seeking to serve this specified student population and community.

Brief Description of Kind of School to Be Chartered:

Provide a clear and concise overview of the proposed school model, highlighting the key design elements of the school model critical to its success in serving the intended student population.

Mission Statement:

The mission is a statement of the fundamental purpose of the school that describe why it exists and whom it intends to serve in 1-2 concise, clear sentences.

Instructions for the Applicant Eligibility Determination

Purpose

The Applicant Eligibility Determination is a review process required for all applicants who are new operators or non-mayor-sponsored charter school operators seeking to submit a Prospectus and Full Application. Any organization or individual may become eligible to submit a charter application by meeting specific eligibility requirements as detailed in Indiana Code Title 20. Education. To demonstrate the charter applicant has met all requirements to submit a Prospectus and Full Application, the eligibility determination form must be submitted by 12 p.m., Dec. 12, 2025.

Process

All applicants who intend to submit a Prospectus and Full Application during the Spring 2025 Charter Application cycle must submit eligibility determination forms as PDFs in an email to the Senior Governance Analyst, Brielle Petty at brielle.petty2@indy.gov by 12 p.m., Dec. 12, 2025. Applications from applicants who do not submit the forms by the deadline will not be accepted.

Guidance

The information below is provided to support applicants in successfully completing the eligibility determination forms.

In order to apply to become a charter school authorized in Indiana, an applicant shall meet the requirements of an “organizer” as detailed in Indiana Code Title 20. Education § 20-24-1-7, which are as follows:

- The organizer must be a nonprofit corporation that is incorporated or registered in Indiana;
- The organizer must be recognized by the Internal Revenue Service to be tax exempt and maintains such tax-exempt status; (*This may be pending during the application process but must be final prior to the first day of student instruction unless express written permission is granted by the Director of Charter Schools.*)
- The organizer must have an independent board whose members have been elected or selected under the organizer's application and that has entered into a contract under this article to operate a charter school.

If an applicant intends to contract with an education service provider for substantial educational services, management services, or both educational services and management services, the request for proposals shall require the applicants to provide the following per Indiana Code Title 20. Education §20-24-3-2.5:

- Evidence of the education service provider's success in serving student populations similar to the targeted populations, including demonstrated academic achievement as well as successful management of nonacademic school functions, if applicable.
- A term sheet setting forth:
 - the proposed duration of the service contract;
 - the roles and responsibilities of the organizer, the school staff, and the education service provider;
 - the performance evaluation measures and timelines;
 - the compensation structure, including clear identification of all fees to be paid to the education service provider;
 - the methods of contract oversight and enforcement;
 - the investment disclosure;
 - that the school and the authorizer are entitled to any data directly related to the operation or management of the school, such as financial data, enrollment data, demographic data, performance data, and student data, in the possession of the education service provider, but may not include any proprietary, intellectual property, or similarly protected data of the education service provider; and

- the conditions for renewal and termination of the contract.
- A disclosure statement to explain any existing or potential conflicts of interest between the organizer and the proposed education service provider or any affiliated business entities.
- Assurance that the organizer will be structurally independent of the education service provider and shall set and approve school policies. The assurance must also provide that the terms of the service contract must be reached by the organizer and the education service provider through arm's length negotiations in which the organizer must be represented by legal counsel. The legal counsel may not also represent the education service provider.

A charter school shall be established for one or more of the following purposes, as stated in Indiana Code Title 20. Education §20-24-2-1:

- Serve the different learning styles and needs of public school students.
- Offer public school students appropriate and innovative choices.
- Provide varied opportunities for professional educators.
- Allow public schools freedom and flexibility in exchange for exceptional levels of accountability.
- Provide parents, students, community members, and local entities with an expanded opportunity for involvement in the public school system.

A charter school is prohibited to discriminate on the basis of the following, as detailed in Indiana Code Title 20. Education §20-24-2-2:

- Disability
- Race
- Color
- Gender
- National origin
- Religion
- Ancestry

Charter Applicant Eligibility Determination Form

This form is for new operators and non-mayor-sponsored charter school operators only. Please review the statements below and indicate whether each is “Yes/True,” and will hold true if the application is approved. If the answer to any item is “No/False,” please submit a statement of explanation.

Assurance	Yes/True	No/False
1. The applicant is a nonprofit corporation that is incorporated or registered in Indiana;		
2. The applicant has been recognized by the Internal Revenue Service to be tax exempt and maintains such tax exempt status, or is in the process of doing so;		
3. The applicant has an independent board whose members have been elected or selected under the organizer's application and that has entered into a contract under this article to operate a charter school.		
4. The applicant is not a for-profit entity.		
5. If the applicant chooses to contract with an Education Service Provider, it will comply with all required submissions of OEI.		
6. The charter school seeks establishment in order to serve one or more of the purposes of a charter school outlined in Indiana Code Title 20. Education §20-24-2-1.		
7. The charter school will not discriminate on the basis of disability, race, color, gender, national origin, religion, ancestry, or any other characteristic.		
8. There are no liens, litigation history and/or sanctions from any local, state, and/or federal regulatory agency against the nonprofit corporation.		

Certification

I certify that I have the authority to submit this documentation and that all information contained herein is complete and accurate. I recognize that any misrepresentation could result in disqualification from the application process or revocation afterward.

Signature of Founding Board Chair

Date

Instructions

All applicants are required to submit the prospectus and/or full application to the Charter Achievement Portal (CAP) **no later than 12 p.m. by the stated deadline**. The Mayor's Office reserves the right to reject or seek additional information on incomplete submissions or those that do not follow the proper procedure or formatting.

Contents

Your submission **must** contain the following items in the order below. Please upload to CAP as a single PDF document, including attachments. Excel spreadsheets will be uploaded as a separate item:

- Charter Application Information sheet
- **Prospectus only:** Eligibility Determination Form, if applicable
- **Full Application only:** Technical Requirements Checklist, per criteria for charter school proposals outlined in IC 20-24-3-4
- Narrative responses
- Need Analysis Chart, using the provided template (include within the narrative structure)
- Community Partnerships Chart, using the provided template (include within the narrative structure)
- Attachment 1: Organizational Chart for the school and its network, if applicable; this should show structure in Year 1 and subsequent years, if different.
- Attachment 2: List the members of the school's proposed leadership team and governing board, including their roles with the school, their current job and employer, and full resumes with contact information, two professional references, and assurance of background checks for all individuals listed. Background checks must comply with current Indiana Code.
- Attachment 3: Articles of Incorporation
- Attachment 4: IRS 501c3 application or proof of nonprofit and tax-exempt status
- **Full Application only:** Attachment 5: Board of Directors by-laws (include for replications only if changed from earlier version)
- Attachment 6: Statements of Economic Interest for every board member, using the provided template OR the template provided by the State of Indiana
- Attachment 7: Five-Year Budget, Staffing Plan and First-Year Cash Flow Analysis, using the provided template (Excel spreadsheets)
- Attachment 8: the Replication Workbook using the provided template (Excel spreadsheet), if applicable
- Attachment 9: Education Service Provider and/or Conversion School questionnaires, if applicable
- **Optional** Attachment 10: Letters of support from **relevant** community partners

The application is not to exceed 75 pages. Attachments listed above do not count toward the limit. Due to the volume of information required, no other attachments will be accepted with your submission.

Format and Submission

Documents **must be submitted as PDFs** unless a different file type, such as an Excel Spreadsheet, is specifically requested above. The following format must be followed for each submission:

- All PDF documents should be formatted with a white background, measuring 8.5" x 11";
- All pages should be numbered, with one-inch margins on all sides and no font smaller than 10-point
- All attachments should be labeled in the upper-right side of the header: "Attachment X";
- Paragraph formatting may not be more compact than standard single space.

The narrative and other documents listed in the instructions should be completed and uploaded as a **single PDF document** in CAP. Once finalized, all items should be "submitted for the prospectus" or "submitted for full application" in CAP, which indicates to OEI that they are ready for review.

Charter Application Information Sheet

After the cover or title page, this should be the next page of the prospectus or full application. Responses may be the same or similar to what was included for the Letter of Intent.

Name of Proposed Charter School:

Name of affiliated charter network, if applicable:

Proposed School Address (if known) or neighborhood:

School District in which Proposed School would be located:

Legal Name of Group Applying for the Charter (Name of nonprofit organizer):

Applicant's Designated Representative:

Address:

City:

State:

Zip code:

Daytime telephone:

E-mail address:

The proposed school will open in the fall of school year:

May not be sooner than Fall 2027 for a new operator.

Proposed Grade Levels & Total Student Enrollment

For each year, please indicate both target enrollment (TE) and maximum enrollment (Cap), which will be used as charter capacity for the purposes of the school's first year with Enroll Indy if approved. You may be asked to submit minimum viable enrollment by grade level or total later in the process.

Grade	Year 1		Year 2		Year 3		Year 4		Year 5		Year 6		Year 7	
	Enrollment TE	Cap	Enrollment TE	Cap	Enrollment TE	Cap	Enrollment TE	Cap	Enrollment TE	Cap	Enrollment TE	Cap	Enrollment TE	Cap
K														
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
Adult														
Total														

Is this a single-gender or co-educational school?

If single-gender, please indicate who will be served by school:

Indicate "Girls" or "Boys"

Are you planning to work with a third-party management organization as defined in Indiana Code §20-24-3-2.5 to manage the educational program and operations of the school but not hold the charter directly?

Indicate "Yes" or "No"

If so, please indicate the name of management organization:

Have you submitted this application to other authorizer(s)?

Indicate "Yes" or "No"

If so, please list the authorizer(s) and the date(s) of submission:

Do you plan to submit this application to another authorizer before the Mayor's Office makes a final determination on your application?

Indicate "Yes" or "No"

If so, please indicate the name of the authorizer:

Have you submitted any other applications to an authorizer in the previous five (5) years?

Indicate "Yes" or "No"

If so, please indicate the name of *the authorizer, the date, and the name of the school* on the application.

Are you a charter school currently operating in Indianapolis that is seeking to transfer authorizers?

Indicate "Yes" or "No"

If so, please name the authorizer currently overseeing the school:

Are you looking to replicate an existing charter school? If so, please name the existing school(s) and authorizer(s).

Only applicable to replication application. New operators put "N/A."

Are you intending to pursue an Innovation Network Restart Application with Indianapolis Public Schools?

Indicate "Yes" or "No"

Are you intending to pursue [another type](#) of Innovation Network Partnership with Indianapolis Public Schools?

Indicate "Yes" or "No" and the type of partnership as identified in the linked page above.

Application Narrative

The narrative should show a clear understanding of the [Mayor's Performance Framework](#) and how the school intends to meet those standards. Strong submissions will be concise, impactful, and free of typos and other errors. The narrative should be limited to the topics included in the outline below. Responses should be structured in the same format as the outline using the provided section headings, though answers need not be bulleted.

Several sections of the narrative are marked as “part of the full application only.” Do not include these in your prospectus submission. If invited to submit a full application, or if submitting a replication application, complete all narrative sections. This is an opportunity to revise information from the prospectus round as needed, whether to reflect updates, changes in model, answers to questions posed by the Indianapolis Charter School Board or OEI staff, etc. All full proposals must comply with the criteria for charter school proposals outlined in IC 20-24-3-4.

Pursuant to IC 20-24-3-4.5, the narrative outline is based on “Standards for Quality” that are aligned to nationally recognized authorizing principles, including the National Association of Charter School Authorizing’s [Charter School Application](#) and [Core Application Evaluation Criteria](#). For previous application examples, please refer to the Past Charter Application [page](#) on our website.

School Overview

Mission and Vision

- Explain the mission of your proposed charter school in one or two clear, concise sentences. Your mission statement should articulate what the school intends to do and whom it intends to serve.
- Explain the vision of your school in one or two clear, concise sentences. The vision should outline how the school will operate and what it will achieve in the long term.
- Avoid jargon and technical terminology — parents and members of the community who wish to know more about the school should be able to read the mission and visions statements and get a clear sense of the foundation of the school and its purpose.

Education Need and Anticipated Student Population

- Where will the school be located and who is the target student population?
- Why does the community, neighborhood, and/or target student population you identified in the prior question need the school you are proposing? Please justify the need in detail and include performance and key demographic indicators of surrounding schools in your answer. Data referenced should be as locally relevant as possible. **If replicating, include information about the performance of current schools in your rationale.**
- Complete the Need Analysis Chart below for all schools (traditional and charter) within a 3-mile radius of your proposed location. Only use schools that include your proposed grade levels. The chart below serves as a template – you may need to add more rows depending on your proposed location. If you do not know your specific location, complete the chart for all proposed neighborhoods.

School Name	2024-25 Enrollment	Race/Ethnicity Subgroups (%s)	FRL population (%)	SPED & ELL (%)	2023-24 Suspension & Expulsion Rates (%)	2023-24 ILEARN/SAT Combined Proficiency Rate (%)
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- Describe non-academic challenges the school is likely to encounter.
- Describe the evidence that demonstrates how the school model will be successful in furthering student learning for the targeted student population. Describe what the school would do more effectively than the schools that are now serving that population.
- Strong answers will reflect a nuanced understanding of recent school openings and closings, as well as populations shifts and dynamics of existing nearby schools and districts.

Enrollment and Demand

- How many students will be enrolled each year in each grade level? Enrollment targets must be defined by grade level for all seven years of the charter term, as well as total enrollment per year. **You may copy the projected enrollment table from the Charter Application Information Sheet in this section.**
- Explain **in detail** your rationale for selecting this particular school size and provide specific evidence that the demand for your school is sufficient to sustain projected enrollment in year one and beyond. This should include neighboring school enrollment, trends from similar schools that have opened in recent years, average district and/or charter enrollment, census track data with the number of school age children in the proposed neighborhood, and other relevant and supporting data.

- Describe the recruitment process and explain how the school and its program will be publicized and marketed throughout the community. This should include both in-person and digital efforts and be specifically related to the community in which the school intends to locate.
- Explain exactly what the school’s enrollment process will be, including an acknowledgement that participation in [Enroll Indy](#) is required upon approval of a charter. Schools must acknowledge that they, per OEI’s policy, have a responsibility to “backfill,” or continue to enroll students where capacity allows after the conclusion of a Count Day. The section should demonstrate a strong understanding of Enroll Indy’s processes and requirements.
- Pursuant to IC 20-24-3-4 (b), please acknowledge that you will comply with any applicable desegregation orders. Currently, there are none in effect for Marion County, so a concise acknowledgement of this requirement will suffice for this area.
- Include admissions policy and criteria, subject to IC 20-24-5.

Community Engagement and Partnerships

- Describe the relationships you have established to generate community engagement in and support for the proposed school and how you have assessed demand and/or solicited support for the school.
- Describe the role to date of any parents and community members involved in developing the proposed school. Describe how you will engage parents and community members from the time that the school is approved through opening.
- Discuss the community resources that will be available to students and parents. Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Specify 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. Complete the Community Partnerships template below.
- Describe the steps you have already taken to develop partnerships and build relationships, including people and organizations with whom you have already met, and your plans to further develop additional partnerships and relationships. Be as specific as possible.
- Please ensure you highlight areas where partnerships align with the proposed geographic location of the school.

Name of Organization	Representative from Organization	Address, phone number and email address	Specific products or services to be provided to the school	Will this partnership include a formal agreement? (i.e. contract, MOU)	Is a letter of support included in the application?
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Replication and Capacity for Growth

For existing operators seeking replication only – new applicants do not complete.

- Complete the Replication Workbook (Excel Spreadsheet)
- If the school you are proposing to replicate is not a mayor-sponsored charter school, provide links to where OEI may find accountability reports from prior years or include these reports at the end of your prospectus PDF submission.
- What are current short- and long-term plans for replication and growth?
- What resources does your group have to replicate the school for which you are currently applying? What additional resources do you foresee needing to reach your long-term replication goals?
- Explain, in detail, what makes the current school successful and explain the processes that have been put in place that will recreate the success in replicated schools. Strong responses should include an overview of school systems and processes, including how the school will intentionally share best practices among the campuses.
- Have any charters previously been revoked by any other authorizer? If so, please explain.
- Have any charters been rejected for renewal? If so, please explain.
- Do any of the schools have any issues related to legal compliance? If so, please explain.
- Do any of the schools have any issues (legal or otherwise) related to accessibility? For example, with open enrollment processes or individuals with special needs.

Innovation Agreement

For operators intending to pursue an Innovation Network Application with Indianapolis Public Schools only.

- Why is your team pursuing an Innovation Network Application? If you are coming from outside Indianapolis, what brought you here?
- Please explain, in detail, your team's qualifications and any prior experience that demonstrates a successful track record. Please include the names of previous schools and their location, if referenced, as well as prior authorizers/sponsors for those schools.
- Please explain, in detail, your team's qualifications and any prior experience that demonstrates a successful track record with school restart or turnaround, if pursuing a restart application. Please include the names of previous schools and their location, if referenced, as well as prior authorizers/sponsors for those schools.
- Describe where you are in the Innovation Application process with Indianapolis Public Schools.
- If your Innovation Application proposes using an IPS facility, what community engagement have you pursued so far in your proposed location, or what engagement are you planning to ensure you can build relationships with the existing school community?
- If pursuing a restart application, describe your plans for staffing and what criteria you plan to use to determine whether to retain existing staff.
- If pursuing a restart application, what are your plans if a restart placement is not available or if your restart application with IPS is not approved?

Educational Program Design

Schools' innovative approach, mission, or target audience might require them to provide unique services or take advantage of more unusual methods to serve their students and communities. This could be in the area of curriculum, instruction, assessment, student work or responsibilities, extra-curricular programs, use of technology, and more. Although new strategies can be considered innovative simply because they are novel, it is important to remember that education is high stakes. If there is research, data, or evidence to promote a relatively new or highly debated model or method, it is essential applicants provide it.

Curriculum and Instruction

*Do not provide a copy of the Indiana state standards or requirements for a Core 40 Diploma in place of curriculum details. Where needed, please [link](#) to curriculum samples, lesson plans, or other curricular materials; **do not include them as attachments to this application.***

- Describe the educational model of the proposed school. Include in this description a discussion of the instructional methods to be used. Include a brief summary of the research that demonstrates that this approach will work with your anticipated student population.
- Describe the basic learning environment, including class size and structure.
- Provide the school calendar (including the number of days the school will be in session) and the daily hours of operation. Describe the way the school day will be organized for instruction, student support and intervention, independent study, teacher planning and professional development, enrichment and extra- or co-curricular activities, if any. Provide a sample daily and weekly schedule for a student at the school.
- Provide the name of and a description of the curriculum that will be used by the school for each grade and subject in your school. Please also explain what research or evidence shows that the curriculum is high-quality and aligns with the school's mission. Provide evidence that the curriculum is aligned with Indiana state standards, such as a link to a curriculum map and/or pacing guide.
- Provide a detailed timeline for the selection, development, and implementation of the curriculum. How will school leadership work with teachers to internalize the curriculum? How will that be progress be monitored? If your school model requires teachers to take a unique approach to planning lessons, please explain the approach and how it aligns to your mission.
- If the curriculum will be developed by the school or a group of teachers or staff, please detail who on staff will be responsible for the development, what the development process will be, and where in the process you are currently.
- Explain how the curriculum can be adapted for students learning English as a new language, students with special needs, and students who enter the school above or below grade level. Describe any additional supports the school will use in conjunction with the curriculum to serve those student groups.

Performance Management

- Describe how student baselines and progress will be determined, measured and reported. As a starting point, charter schools in Indiana are subject to mandatory assessment and testing requirements applicable to all Indiana public schools. In addition to state summative assessments, please also include the names of formative and interim assessments you are planning to use, why you chose them, and the projected testing schedule.
- Explain how teachers and school leaders will analyze student data and use it to drive instruction. Please include how data will be collected, how it will be communicated to teachers, and how frequently staff will meet to discuss results.
- Describe the school's policies and standards for promoting students to the next grade or grouping level and what factors would cause a student to be retained. Include how these decisions will be communicated to parents or caregivers.

- For high school students, explain how the school will meet the requirements of the state’s graduation pathways. Describe what pathways will be available for students, the timeline for choosing a pathway, and the supports involved in the process.
- For high school students, explain what systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements.

Special Student Populations

Schools are responsible for hiring licensed and endorsed special educators pursuant to law. School personnel shall participate in developing Individualized Education Programs (IEPs); identify and refer students for assessment of special education needs; maintain records; and cooperate in the delivery of special education instruction and services, as appropriate.

- Describe the overall plan to serve students with special needs, including but not limited to students with Individualized Education Programs or Section 504 plans; English Language Learners; students identified as intellectually gifted; and students at risk of academic failure or dropping out. Identify the special populations and at-risk groups that the school expects to serve, whether through data related to a specifically targeted school or neighborhood or more generalized analysis of the population to be served. Discuss how the course scope and sequence, daily schedule, staffing plans, and support strategies and resources will meet or be adjusted for the diverse needs of students.
- Explain more specifically how you will identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible. Specify the programs, strategies, and supports you will provide, including the following:
 - Methods for identifying students with special education needs (and avoiding misidentification);
 - Specific instructional programs, practices, and strategies the school will employ to provide a continuum of services; ensure students’ access to the general education curriculum; and ensure academic success for students with special education needs;
 - Plans for monitoring and evaluating the progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student’s goals as set forth in the Individualized Education Program (IEP); d. Plans for promoting graduation for students with special education needs (high school only); and e. Plans to have qualified staffing adequate for the anticipated special needs population.
- Describe the language diversity present in the anticipated student population. Explain how the school will meet the needs of English Language Learner (ELL) students, including the following:
 - Methods for identifying ELL students (and avoiding misidentification);
 - Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students;
 - Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services;
 - Means for providing qualified staffing for ELL students.
- Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports you will provide for these students.
- Explain how the school will identify and meet the needs of intellectually gifted students, including the following:
 - Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities;
 - Plans for monitoring and evaluating the progress and success of intellectually gifted students; and c. Means for providing qualified staffing for intellectually gifted students.

School Culture and Discipline

- Describe the culture of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.
- Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for enculturating students who enter the school mid-year. Specifically include information for how the school will accomplish this for students with special needs, including those receiving special education services and multilingual learners.
- Explain your methods of establishing cultural competency of teachers, administrators, staff, parents and students, including the identification of all racial, ethnic, language-minority, cultural, exceptional learning and socioeconomic groups represented in the school's student population.
- Explain your school discipline plan, including assurances it will be graduated, how it will be publicized within your school and with families, and how parents will be notified when issues arise. Include consequences for offenses and how they will be carried out, as well as explicitly if and when suspension or expulsion would be considered. School discipline plans must adhere to IC 20-24-5.5.
- Explain how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings. Include procedures for due process when a student is suspended or expelled as a result of a code of conduct violation, including a description of the appeal process that the school will employ for students facing expulsion and a plan for providing services to students who are expelled or out of school for more than 10 days.

Supplemental Programming and Support for Learning

This section is completed as part of the Full Application only.

- Describe the extra- or co-curricular activities or programming the school will offer; how often they will occur; and how they will be funded, including programs like summer school.
- Describe the programs or strategies to address student mental, emotional, and social development and health.
- If applicable, describe any other student-focused activities and programs that are integral to the educational and student-development plans.
- Describe how you will engage parents in the life of the school. Explain the plan for building family-school partnerships that strengthen support for learning and encourage parental involvement. Describe any commitments or volunteer activities the school will seek from, offer to, or require of parents.
- Describe how parental satisfaction will be gauged and the process for gathering parental satisfaction results.

Leadership and Governance

Educational Program Capacity

- Identify the key members of the school's leadership team. Identify only individuals who will play a substantial and ongoing role in school development, governance and/or management, and will thus share responsibility for the school's educational success. These may include current or proposed school leadership or management, and any essential partners who will play an important ongoing role in the school's development and operation.
- Describe the team's individual and collective qualifications for implementing the school design successfully, including capacity in areas such as:
 - School leadership, administration, and governance;
 - Curriculum, instruction, and assessment;
 - Performance management; and
 - Parent and community engagement.
- Describe the group's ties to and/or knowledge of the target community.
- Identify any organizations, agencies, or consultants that are partners in planning and establishing the school, along with a brief description of their current and planned role and any resources they have contributed or plan to contribute to the school's development.
- Identify the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record. Provide specific evidence that demonstrates capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in. Also provide, as Attachment 2, the qualifications and resume for this individual. Discuss the evidence of the leader's ability to effectively serve the anticipated population.
- If no candidate has been identified, provide a summary of the job description or qualifications, and discuss the timeline, criteria, and recruiting and selection process for hiring the school leader.
- Describe the responsibilities and qualifications of the school's leadership/management team beyond the principal/head of school. If known, identify the individuals who will fill these positions and provide, as Attachment 13, the qualifications, resumes, and professional biographies for these individuals. If these positions are not yet filled, explain the timeline, criteria, and process for recruitment and hiring.
- Explain who will work on a full-time or nearly full-time basis following assignment of a location to lead development of the school and the plan to compensate these individuals.

Board Governance

At the prospectus point, your board should be mostly finalized and there should be no glaring gaps in critical skillsets (law, finance, academics). Information on board members will not be considered complete unless resumes and statements of economic interest are provided for each member.

- List all current and identified board members and their intended roles.
- Provide a summary of the organizational structure of the school and roles and responsibilities of the board in relation to the school's leader(s), and educational service provider, if applicable. Discuss the role distinctions as they relate to curriculum, personnel decisions, budget allocation, and vendor selection.
- Describe the track record of the board members in serving the target student population. What evidence demonstrates they will be more effective than counterparts at existing schools serving that population?
- Explain the procedure by which board members have been and will be selected. How often will the board meet? Discuss the plans for any committee structure.

- Briefly detail your plan for recruiting board members that meets the goal for diversity in skillset and demographics. How will the board expand and develop over time? How and on what timeline will new members be recruited and added, and how will vacancies be filled?
- Describe the process by which the governing board will develop policies and make decisions, as well as its plan for overall board development and training.
- Provide a description of how the board evaluates the school leader and itself, as well as its goal-setting process.
- Describe the board's procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.
- **For Replication:** If there will be a network-level board, identify any board development requirements relative to the organization's proposed growth and governance needs.

Compliance and Governing Documents

*Please include copies of the following organizational documents, **uploaded with your application as part of a single merged PDF document:***

- School Organizational chart. The organization charts should clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the governing board, staff, any related bodies (such as advisory bodies or parent/ teacher councils), and any external organizations that will play a role in managing the school. The organization charts should also document clear lines of authority and reporting within the school.
- Articles of incorporation, including board by-laws
- Evidence that the applicant has been determined by the Internal Revenue Service to be operating under not-for-profit status or evidence that the applicant has applied for said status. A Form 1023 is acceptable for this section.
- For each school leader/administrator and governing board member, a signed statement of economic interest form (attached) in compliance with IC 20-24-3-4 (c).
- For each school leader/administrator and governing board member, a current resume detailing qualifications and experiences. Resumes should include, at a minimum, education, employment, and professional and community activities, and two references who are not related to the individual. Resumes do not need to include personal addresses or contact information.
- Board members and School Leaders of Mayor-sponsored charter schools must also have background checks in order to maintain compliance with the terms of the charter agreement. New board members and administrators must have background checks conducted at least fourteen days prior to approval or hire. Please upload a background check policy that is in compliance with IC 20-26-2-1.5.
- If the board is contracting with an educational service provider, please complete and submit the **Educational Service Provider questionnaire**. If the school is a conversion charter school, please complete and submit the **Conversion Charter School questionnaire**.

Operations Plan and Capacity

Facility

OEI understands schools pursuing an Innovation partnership may not have all the required details for this section. In that case, please be as detailed as possible about proposed location and facility needs. Applications that do not address facility plans or needs will be considered incomplete.

- Pursuant to IC 20-24-3-4 (b), please describe the school's intended physical plant, including location, address (if known), whether the facility is new or part of an existing building, square footage, acreage, and other features, such as layout, number of classrooms, etc. Charter school facilities must comply with applicable state, local and authorizer health and safety requirements. In addition, charter school applicants must be prepared to follow applicable city planning review procedures.
- Provide a detailed breakdown of any anticipated construction or renovation costs (these should be discussed in the text and reflected in your budget).
- Describe the process for identifying and securing a facility, including any brokers or consultants you are employing to navigate the real estate market, plans for renovations, timelines, financing, etc. If you currently hold a facility or have an MOU or other proof of intent to secure a specific facility, please provide proof of the commitment as Attachment 7.
- If the charter school or its applicants or partners would own or lease its facility, provide a description of the ownership or lease arrangement of the facility, including any potential conflicts of interest and arrangements by which such conflicts will be managed or avoided. Include name of bank or lender, rate, term, and status (loan approved, in negotiations, assumed).

Staffing, Hiring, and Evaluation

- Provide a comprehensive staffing plan as part of Attachment 7.
- Please describe your staffing model, outlining the number of teachers and staff that will be hired (including special education and English Language Learner staff). Explain methods for selection, retention, and compensation of employees.
- What are your plans for staff professional development? How often will PD occur and who is responsible for coordinating and creating it? What partners might you work with?
- How are teachers and administrators going to be evaluated?
- Explain how the school intends to handle unsatisfactory leadership or teacher performance, as well as leadership/teacher changes and turnover.
- Describe the arrangement for providing teachers and other staff with health insurance, retirement benefits, liability insurance, and other benefits.
- Describe your staff background check process, ensuring accordance with current Indiana code.
- **REPLICATION ONLY:** Please provide rationale and evidence that shows your current school/network has the human capacity capital to replicate successfully. What staffing structures need to change? Will there be changes at any existing schools?

Ongoing Operations and Capacity

OEI understands schools pursuing an Innovation partnership may not have all the required details for this section. In that case, please be as detailed as possible about proposed location and transportation needs. Applications that do not address transportation plans or needs will be considered incomplete.

- If you plan on providing transportation to students, include a detailed description of the transportation plan. While it is understood that you may be unable to provide an exact transportation plan without knowledge of your actual student population, please be as specific as possible. At minimum, you must acknowledge, per Indiana charter law, whether you plan to provide it. The transportation plan also must

include provisions for students protected under the McKinney Vento Act and an acknowledgement of the school's responsibility to provide these services.

- If you do not plan on providing transportation, explain how the school will still be accessible to all of the intended student population.
- Describe the applicant team's individual and collective qualifications for implementing the Operations Plan successfully, including capacity in areas such as the following:
 - Staffing;
 - Professional development;
 - Performance management;
 - General operations; and
 - Facilities management.
- Describe the organization's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

These questions are completed as part of the full application only.

- Provide a clear and detailed timeline for getting the school into operation, from receipt of the charter to the opening of the school.
- In addition to the timeline, provide a detailed startup plan that includes staffing as well as the resources you will use to support the startup activities.

Financial Plan and Capacity

Financial Plan

Remember that it is prudent to be conservative in your assumptions for the amount of funding you expect to receive per-student. All budget analyses should assume a July 1-June 30 fiscal year. **Budget assumptions should be highly detailed, realistic, and based on enrollment trends within the landscape.** You **must** use the budget and first-year cash flow analysis templates provided.

Per section 3.7 of the charter school contract, the budget **must** show evidence that the charter school agrees to establish an escrow account of no less than \$30,000 to pay for legal, wind down of operations, and audit expenses that would be associated with a dissolution should it occur. The charter school may provide for the full amount in its first-year budget or provide for a minimum of \$10,000 per year for the first three of its charter term.

In the budget, you should only include those grants or in-kind donations which have already been **firmly committed**.

In the budget workbook template:

- Provide the school's estimated costs and revenues from the school's pre-operational start-up phase through the fifth year of operation, including assumptions behind revenue and expenditure projections. In addition, provide a cash flow analysis for the first fiscal year of operation. **Applicants are required to use the Excel five-year budget and cash flow analysis template.**
- Budgets **must include** line items for IDEA and English-Language Learner funding. You may expand on these contingency plans in the narrative for this section.
- Please explain the rationale for each line item within the budget. (For example, details regarding average staff salary, costs for materials and supplies, rent and/or construction costs, technology, etc. should be explained thoroughly.) Provide assumptions for both revenue and expenditures and the basis for those assumptions.
- Be prepared to budget at 75, 50, and 25 percent of your proposed total enrollment. If OEI determines enrollment projections to be out of line with recent dynamics, budgets at these intervals will be requested during the Request for Clarification phase.

In the application narrative:

- Describe the systems, policies and processes the school will use for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements.
- Describe the roles and responsibilities of the school's administration and governing board for school finances and distinguish between each.
- Describe any services to be contracted, such as business services, payroll, and auditing services, including the anticipated costs and criteria for selecting such services.
- Provide a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income (e.g., grants, donations, fundraising).
- Detail your contingency plans should you experience a budget shortfall, low student enrollment or other operational difficulties or crisis circumstances. Are there any expenditures that are essential to the model that cannot be cut under any circumstances? Include your minimum viable enrollment in this explanation.
- A letter of commitment from funders must be included in the attachments for any fundraising revenue.
- If you are planning to pursue certain grants or donations but have not yet received a commitment for these contributions, do not include them in your budget – instead, provide a description of these

potential contributions here (including the source, estimated amount of contribution, and expected date of receipt if known).

- Please include any additional details necessary for understanding your strategic budgeting priorities.
- **REPLICATION ONLY:** Do you anticipate any of your fiscal policies and procedures changing once you replicate? If so, how?
- **REPLICATION ONLY:** Explain plans for supporting additional costs or debt associated with this launch and how network/other school resources may be leveraged. When do you project the proposed school will become sustainable?

Financial Management Capacity

- Describe the applicant team’s individual and collective qualifications for implementing the Financial Plan successfully, including capacity in areas such as the following:
 - Financial management;
 - Fundraising and development; and
 - Accounting and internal controls.
- Describe the financial policies and procedures the school will maintain in order to comply with the [State Board of Accounts](#).
- Describe the fiscal controls and financial management policies the school will employ to track finances in its daily business operations.
- If the school plans to contract with an outside provider, detail who the provider is and what services will be contracted.

Risk Management

This section is completed as part of the Full Application only.

- Provide a description of the risk management philosophy and approach to minimizing liability of the charter school, its governing board members, and employees.
- Schools receiving a charter from the Mayor of Indianapolis will be required to indemnify the City of Indianapolis, the Mayor's Charter Schools Advisory Board, related entities and, their respective officers, employees and agents.
- In addition, please provide evidence from an insurer of the school’s ability to obtain liability insurance coverage in the amounts set forth below; however, an applicant may provide a written justification if it is unable to obtain, or believes it unnecessary to obtain, insurance coverage in the following recommended amounts:
 - Commercial General Liability: \$1,000,000 per occurrence; \$2,000,000 aggregate
NOTE: SUCH COMPREHENSIVE GENERAL LIABILITY INSURANCE MUST EXPRESSLY COVER CORPORAL PUNISHMENT LIABILITY AND ATHLETIC PARTICIPATION MEDICAL COVERAGE.
 - Directors' and Officers' Liability/ Educators' Legal Liability/ Employment Practices Liability: \$1,000,000 per occurrence; \$3,000,000 aggregate
 - Sexual Abuse Liability: \$1,000,000
NOTE: SEXUAL ABUSE LIABILITY MUST BE A SEPARATE POLICY OR A SEPARATE COVERAGE PART WITH LIMITS INDEPENDENT OF OTHER COVERAGE PARTS IN THE GENERAL LIABILITY POLICY.
 - Automobile Liability: \$1,000,000 combined single limit
 - Umbrella (Excess Liability): \$3,000,000 per occurrence; \$3,000,000 aggregate
 - NOTE THAT THE UMBRELLA POLICY MUST INCLUDE: COMMERCIAL GENERAL LIABILITY, DIRECTORS' AND OFFICERS' LIABILITY/EDUCATORS' LEGAL LIABILITY/EMPLOYMENT PRACTICES LIABILITY, AUTOMOBILE LIABILITY AND SEXUAL ABUSE LIABILITY.
 - Workers Compensation Liability: As required by Indiana law
- Provide an estimate from an insurance agent/broker for the insurance coverage (with a minimum A-BEST rating) identified above (or such other coverage amounts as the charter school would be able to obtain).

- For schools that plan to serve large populations of students with exceptional needs, has liability for malpractice and due process been assessed and addressed in the budget and risk management plan?
- Risk management plans should also include an understanding of IDOE safety plan requirements. Provide the school plan for safety and security for students, the facility, and property. Explain the types of security personnel, technology, equipment, and policies that the school will employ.

Full Application Technical Requirements Checklist

This sheet, pursuant to IC 20-24-3-4, must be submitted at the same time as the full application (optional for the prospectus – some items may not yet be able to be completed). Please type the information requested.

Information required by Indiana law	Page Number where included
Identification of organizer	
Organizer's structure and governance plan	
Name of proposed school	
Purpose and mission of school	
School's governance structure	
Management structure	
School's educational and mission goals	
Curriculum and instruction methods	
Methods of pupil assessment	
School calendar	
Admissions policy and criteria, subject to IC 20-24-5	
Age or grade range of students to be enrolled	
Plan for compliance with any applicable desegregation order	
Personnel plan, including methods for selection, retention and compensation of employees	
Arrangements for providing teachers and other staff with health insurance, retirement benefits, liability insurance, and other benefits	
Description of staff responsibilities	
Budget and financial plans	
Description of the physical plant	
Transportation plan	
Discipline program, subject to IC 20-24-5.5	
Date when charter school is expected to begin operations	
Date when charter school is expected to have students attending the school	
Any other applications submitted to an authorizer in the previous five years	
References to manner in which authorizer must conduct annual audit of academic, finance, and governance operations (Mayor's Performance Framework)	
Statement of economic interest forms that contain the same information specified under IC 3-8-9-8 for each board member of the proposed school	
*For charter school proposals from applicant currently operating one or more charter schools in any state or nation, evidence of past performance and current capacity for growth.	
*For proposals concerning an existing charter school overseen by a different authorizer than the authorizer to which the organizer is submitting the proposal, the proposal must include written acknowledgement of the proposal from the current authorizer.	

Education Service Provider (ESP) Questionnaire

Please note this questionnaire, in compliance with IC 20-24-3-2.5, is to be filled out by any applicant contracting with an Education Management Organization (EMO), Charter Management Organization (CMO), or any other education service provider.

Portfolio

- List all of the schools in the network, the number of years they have been in operation, and the number of students served by those schools.
- Provide names and contact information for all other authorizers that oversee schools within the network.
- Describe the ESP's growth plan. Explain how the organization will maintain fiscal responsibility and provide quality services during the period of growth.

Academic Performance

Provide the following academic information for each school managed by the organization.

- Pass rates or equivalent for the state's mandated assessments in English Language Arts and mathematics;
- Performance of students on statewide assessments compared to students in nearby traditional public schools;
- Graduation rates for every year the school has had graduates;
- Post-graduation degree attainment, if available;
- Any additional evidence showing that schools are serving student populations similar to the target population.

Leadership

- Please explain the leadership structure of the organization and include an organizational chart.
- Has there been any turnover in leadership within the organization? If so, please describe.
- Provide a list of the board of directors of the ESP and their length of service.
- Explain any turnover on the board that was not due to term limits.
- How often does the ESP assess itself and gauge the satisfaction of its clients?

Services

- What services does the ESP provide?
- Include as an attachment a copy of the proposed management agreement. The agreement should include, but not be limited to:
 - Specific measures and timelines that the school's board will use to hold the ESP accountable;
 - Consequences for not meeting those standards;
 - Terms for contract termination or renewal;
 - Differentiation of what is owned by the school and what is owned by the management organization; and
 - A disclosure statement to explain any existing or potential conflicts of interest between the organizer and the proposed education service provider or any affiliated business entities.

Finances

Provide the following financial information and/or documents for the management organization.

- The most recent federal tax return;
- The ESP's annual budget;
- Projected five-year budget;

- Detailed list of all debts the ESP has;
- The last three years of complete financial audits;
- The investment disclosure;
- Compensation structure, including fees paid to the ESP by schools and services received for that fee; and
- Names of schools with which contracts have been terminated.

Term Sheet

Provide a term sheet setting forth the following:

- The proposed duration of the service contract;
- The roles and responsibilities of the organizer, the school staff, and the education service provider;
- The methods of contract oversight and enforcement.
- That the school and the authorizer are entitled to any data directly related to the operation or management of the school, such as financial data, enrollment data, demographic data, performance data, and student data, in the possession of the education service provider, but may not include any proprietary, intellectual property or similarly protected data of the education service provider.

Assurances

Please provide assurance that the organizer will be structurally independent of the education service provider and shall set and approve school policies.

- The assurance must also provide that the terms of the service contract must be reached by the organizer and the education service provider through arm's length negotiations in which the organizer must be represented by legal counsel; and
- The legal counsel may not also represent the education service provider.

Conversion School Questionnaire

Please note this questionnaire must be filled out if the applicant is a current private school converting to a charter school.

Current School

Provide the following information for the current private school.

- The number of years the school has been in operation; and
- The number of students served by the school in all of the years of operation.

Academic Performance

Provide the following academic information for the school (if applicable).

- Pass rates or equivalent for the state's mandated assessments in English Language Arts and mathematics;
- Performance of students on statewide assessments compared to students in nearby public schools;
- Graduation rates for every year the school has had graduates;
- Post-graduation degree attainment, if available.

Leadership

- Please explain the leadership structure of the school, and include an organizational chart.
- Has there been any turnover in leadership within the organization? If so, please describe.
- Provide a list of the board of directors of the school and their length of service.
- Explain any turnover on the board that was not due to term limits.

Finances

Provide the following financial information and/or documents for the school.

- The most recent federal tax return;
- The school's annual budget;
- Detailed list of all debts the school holds; and
- The last three years of complete financial audits.

Assurances

This form must be signed by a duly authorized representative of the applicant and submitted with the full proposal. A proposal will be considered incomplete if it is not accompanied by the assurances form signed by an authorized individual.

As the authorized representative of the applicant, I hereby certify that the information submitted in this application for a charter for [insert name of school] to be located at [insert location] is true to the best of my knowledge and belief; and further I understand that, if awarded a charter, the school:

1. Will not charge tuition, fees, or other mandatory payments for attendance at the charter school, or for participation in its programs except for a preschool program or latch-key program per IC 20-5.5-8-2.
2. Will enroll any eligible student who submits a timely application, unless the school receives a greater number of applications than there are spaces for students, in which case each timely applicant will be given equal chance of admission per IC 20-5.5-5-4.
3. Will provide the number of students enrolled in the charter school, the name of each student, and the school district in which each student resides to the Indiana Department of Education by the data established thereby per IC 20-5.5-7-3.
4. Will submit an annual report to the Indiana Department of Education in the form required thereby per IC 20-5.5-9-1.
5. Will submit attendance records, student performance data, financial information, any information necessary to comply with state and federal government requirements, and any other information specified in the charter to the Mayor's Office, IC 20-20-8-3 and relevant sections of IC 20-24.
6. Will participate in the Indiana State Teachers' Retirement Fund in accordance with IC 21-6.1 and the Public Employees Retirement Fund in accordance with IC 5-10.3, IC 20-5.5-6-7, and/or another comparable and appropriate pension or retirement fund approved by the Mayor's Office.
7. Will maintain separate accountings of all funds received and disbursed by the school per IC 20-5.5-7-1.
8. Will ensure 90 percent of individuals who teach hold a license to teach in a public school in Indiana per IC 20-6.13 or are in the process of obtaining a license to teach in a public school in Indiana under the transition to teaching program set forth in IC 20-6.1-3.11 and IC 20-24-6-5.
9. Will permit certified employees at the charter school the opportunity to organize and bargain collectively under IC 20-7.5 and IC 20-5.5-6-3.
10. Will operate with the organizer serving in the capacity of fiscal agent for the charter school and in compliance with generally accepted government accounting principles.
11. Will at all times maintain all necessary and appropriate insurance coverage.
12. Will indemnify and hold harmless the City of Indianapolis (including without limitation, the Mayor's Office), the State of Indiana, all school corporations providing funds to the charter school, and their officers, directors, agents, and employees, and any successors and assigns from any and all liability, cause of action, or other injury or damage in any way relating to the charter school or its operation.
13. Will follow all federal and state laws and constitutional provisions that prohibit discrimination on the basis of the following: disability, race, color, gender, national origin, religion, and ancestry per IC 20-5.5-2-2.
14. Will adhere to all provisions of federal law relating to students with disabilities, including the IDEA, section 504 of the Rehabilitation Act of 1974, and Title II of the Americans with Disabilities Act of 1990, that are applicable to it.
15. Will be non-religious in its programs, admissions policies, governance, employment practices and all other operations, and its curriculum will be completely secular.
16. Will adhere to all provisions of federal law relating to students who are limited English proficient (LEP), including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974, that are applicable to it.

17. Will follow any and all other federal, state, and local laws and regulations that pertain to the applicant or the operation of the charter school including Indiana Charter Schools Law as described in all relevant sections of IC 20-24.
18. Will ensure that a student's records, and, if applicable, a student's individualized education program as defined at 20 U.S.C. 1401(14) of the *Individuals with Disabilities Education Act*, will follow the student, in accordance with applicable federal and state law.
19. Will ensure the school has a background check policy that complies with IC 20-26-2-1.5.
20. Will understand that the Office of Education Innovation (OEI) may revoke the charter if OEI deems that the recipient is not fulfilling the academic, fiscal, and/or governance responsibilities outlined in the charter.

Authorized Representative's Signature and Printed Name

Date

Statement of Economic Interest

This statement of economic interest form, in adherence with IC 20-24-3-4(c) and IC 3-8-9-8, must be completed for every board member and school leader/administrator of the proposed charter school. The information in the statement should reflect the preceding calendar year before the date of submission. Insert “not applicable” where appropriate. Add lines for multiple employers, professional practices, corporations, etc., as needed.

I, **[Name of board member]**, the undersigned, certify the following:

1. The role I am seeking is _____.
2. The name of my spouse was _____.
3. The name of my employer and the nature of its business was
_____.
4. The name of the employer of my spouse and the nature of its business was
_____.
5. If I owned a sole proprietorship, the name of the sole proprietorship and the nature of its business was
_____.
6. If I operated a professional practice, the name of the professional practice and the nature of its business was
_____.
7. If I was a member of a partnership, the name of the partnership and the nature of its business was
_____.
8. If my spouse was a member of a partnership, the name of the partnership and the nature of its business was
_____.
9. If I was a member of a limited liability company, the name of the LLC and the nature of its business was
_____.
10. If my spouse was a member of a limited liability company, the name of the LLC and the nature of its business was
_____.
11. If I was an officer or a director of a corporation (other than a church), the name of the corporation and the nature of its business was _____.
12. If my spouse was an officer or a director of a corporation (other than a church), the name of the corporation and then nature of its business was _____.

I, the undersigned, affirm that the information in this Statement of Economic Interests is true and complete.

Signature and Printed Name

Date