



## **STANDARD OPERATING PROCEDURE 3.18**

### **PROCEDURE TITLE: Management Company Change Request Process**

**Department: Compliance Department**

**Proposed by: General Counsel**

**Effective Date: 01/01/2019**

#### **PURPOSE**

The MANAGEMENT COMPANY CHANGE REQUEST PROCESS includes reviewing applications from schools requesting a change in management after the execution of the initial charter. The community school charter allows schools to request changes to the initial management structure of the school and complete the application process. The applications are reviewed for sufficiency and scored to determine if the new management structure is a viable option for the school.

#### **SCOPE**

The MANAGEMENT COMPANY CHANGE REQUEST PROCESS applies to CSS staff responsible for reviewing and scoring of the Community School Request to Change/Add/Remove ESP, EMO or CMO.

#### **PROCEDURE**

When a community school governing authority expresses interest in changing, adding or removing an ESP, EMO or CMO, the procedure below shall be followed:

1. The governing authority or designee should notify a member of the CSS team that a change is being considered.
2. The Legal Department will send the Community School Request to Change/Add/Remove ESP, EMO or CMO application to the school governing authority, or its representative, via email.
3. Upon receipt of the completed application, the Legal Department shall provide the application and the Review Rubric and Evidence Collection Template to all members of the scoring team.



4. Scoring team members shall review the information provided in the application along with the attachments and complete the scoresheet according to the instructions provided on the template.
5. Scoring team members shall submit their completed scoresheets to the Legal Department within five (5) business days of receipt of the application.
6. Once the scoresheets have been collected, the Legal Department shall schedule a calibration and consensus meeting with the scoring team members.
  - a. Community schools scoring 75% or above on the application may be permitted to change management structures.
  - b. If the community school scores below 75%, it may be permitted to submit supplemental information.
    - i. Once supplemental information is received, the scoring team members will be provided five (5) business days to review the information and update the score.
7. General Counsel or designee shall send communication to the community school governing authority with a final decision within fourteen (14) business days of receipt of the application.
8. Each year in June, the Management Team shall review the management company change documentation and make necessary revisions.

### **DOCUMENTATION/VERIFICATION**

The MANAGEMENT COMPANY CHANGE REQUEST PROCESS documents are saved as follows:

*Location of documentation:*

Shared Drive - Management Company Evaluations - SY[Date] - [School Name]

### **DOCUMENT HISTORY**

Orig. Date June 2019

Rev. Date June 2022

Rev. Date June 2023



## **REVIEW AND APPROVAL**

Reviewers of the MANAGEMENT COMPANY CHANGE REQUEST PROCESS are as follows:

Reviewed by: Management Team:

Date: 06/30/2023

Approved by: President David L. Cash, Jr.

Date: 06/30/2023

The effective date is as of the date signed above. Processes are consistently reviewed and revised as necessary throughout the term. MANAGEMENT COMPANY CHANGE REQUEST PROCESS may be implemented as currently written and will be formally evaluated and revised as necessary going forward.