



REPLICATOR APPLICATION

2027 – 2028 SCHOOL YEAR



REPLICATOR APPLICATION

2027 - 2028

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INSTRUCTIONS

Please review these instructions, the enclosed timeline, and the attachment list before beginning this application. For more detailed instructions on completing this application, you may view the application webinar on the Charter School Specialists website or by clicking here: <https://charterschoolspec.com/sponsorship/applications/>

The application consists of questions in twelve (12) sections, to allow for an evaluation of the capacity of the applicant to operate a charter school.

- 1) The first step is to complete the *Notice of Intent to Apply*. This form can be found on the Charter School Specialists website under the applications section: <https://charterschoolspec.com/sponsorship/applications/> Alternatively, interested individuals may contact Charter School Specialists directly to request a copy of the Notice of Intent to Apply.
- 2) Upon submitting the Notice of Intent to Apply, the applicant may receive a Pre-Application Milestone Acknowledgement Form and Business Plan Template. After reviewing the Notice of Intent to Apply, the Pre-Application Milestone Acknowledgement Form and the Business Plan Template, if applicable, Charter School Specialists will provide the school with the next steps. Once all of the steps have been completed, the applicant will receive a **school specific** application, with unique links for uploading documents.
- 3) Next, complete all application questions and provide all required attachments to the application. All questions in each applicable section must be answered and all required attachments in those applicable sections must be provided for an application to be considered complete.

APPLICATION REQUIREMENTS

- Please see the “Scoring Rubric” of each section, for specific criteria required for scoring on each question.
- In preparing responses to the application, please keep in mind answers to the specific requests carry significance beyond determining whether the applicant will be granted a contract. The answers will determine the specific terms of the contract and will establish parameters for the operation of the school.
- Applicants should be aware that the school will be held accountable for commitments made in the application, and the applicant should evaluate all responses to make sure the proposed plans are reasonable, feasible, and attainable.
- Do not send unsolicited amendments following submission. If an item has been overlooked, please contact Jason Kee at jkee@charterschoolspec.com to determine the ability to submit additional documentation. *There will be a period available to submit supplemental information after the interview.*
- St. Aloysius and Charter School Specialists are looking for quality and clarity in the responses, not just volumes of information.



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- Completion of the application does not guarantee a contract for a community school.
- Also note that receiving a score of 75% on the application does not guarantee a contract for a community school, only that the application is eligible to be recommended for approval.
- Schools may now be in any school district and not only in challenged school districts. If the school is in a school district with lower free and reduced lunch rate or draws a high percentage of students with a lower free and reduced lunch rate, it may reduce the amount of state funds received.

ATTACHMENT REQUIREMENTS

- All attachments are required to be in **PDF format and titled with the Attachment Number**, unless otherwise indicated.
- For questions that request a narrative response, an attachment may be provided, or the text may be copied and pasted from a document into the text box.
- Some questions allow for an optional attachment in addition to answering the question or in lieu of answering the question.

APPLICATION SUBMISSION

- 1) The completed application and all the attachments should be submitted using the unique links that have been provided to the applicant. The final submission should include:
 - The PDF application with all the applicable sections complete.
 - The application should be saved as "School Name - New Application" (i.e., ABC School - New Application).
 - All required attachments should be saved as "Attachment Number – Name of Attachment" (i.e., Attachment 2 – Development Team Resumes).
 - Any optional attachments should be saved according to the Attachment Number and Name.
- 2) The checklist provided should be completed to reflect that all the required attachments have been included. Please note, this list is not exhaustive as there are additional optional attachments that may be included as well.

OUR COMMITMENT

Charter School Specialists will be a high performing sponsor that employs a team of qualified customer service oriented professionals dedicated to increasing access to high-performing schools by expanding educational opportunities, improving school performance and ultimately lifting student achievement.

At St. Aloysius, we believe that every child deserves to receive a good education, no matter what challenges they may be facing. As part of our mission, we strive to be a leader in furthering education for all children



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throughout our community and statewide. Part of the way we fulfill this mission is by being a proud Charter School Sponsor for the state Ohio.

TIMELINE

1) Application Process:

- The Deadline to submit this application is **September 2, 2026**.
- All submitted applications and attachments will be reviewed and scored in accordance with the scoring rubric.

2) Interview Process:

- After the evaluation of the applications, Charter School Specialists (CSS) will conduct an interview with each applicant that scored high enough on the initial round of evaluation.
- Interviews will take place beginning on October 19, 2026.
- All the personnel that will be responsible for executing the plan for the school that are listed in the application, will be required to attend the interview.
- During the interview, CSS will discuss the application and may allow an applicant to supplement the application or attachments that did not receive a perfect score.
- The deadline to submit supplemental documents is one week after the interview.
- CSS will review the supplemental documents and then make recommendations of approval to the St. Aloysius' Board.
- Only applicants that score 75% of eligible points qualify for recommendation of approval.
- Approvals are granted based on a review of points received, high need district, and consistency with the St. Aloysius and CSS mission, vision, strategic plan and sponsorship priorities.
- Notice of approval or denial will be sent to applicants by November 30, 2026.

CHECKLIST OF ITEMS REQUIRED

☐	Resumes of all Governing Authority Members
☐	Organizational Chart and Job Descriptions/Resumes if applicable
☐	Compliance Assessments, if applicable
☐	Education Plan
☐	Record of Success in Academics, if applicable
☐	Community Support
☐	Operational Budget
☐	Three-Year Forecast
☐	Board Approved Financials, if applicable



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SECTION 1 - GENERAL INFORMATION

Scoring Rubric: Section 1 is not scored as part of the scoring rubric.

Primary Contact:

Click here to enter text.

Organization:

Click here to enter text.

Phone:

Click here to enter text.

Email:

Click here to enter text.

Name of Proposed School(s)	Local School District for Proposed School	Proposed Address of School	Proposed Grades to Be Served
<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>
<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>
<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>
<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>
<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>	<i>Click or tap here to enter text.</i>

Is the intent of the school to open an additional facility/location (satellite/annex) under this same charter within the next 2 years?	☐ Yes ☐ No
If yes was selected for the above question, please describe the timeline for addition of the facilities.	<i>Click or tap here to enter text.</i>
Has the applicant previously submitted or is currently submitting this school to any other sponsor for approval.	☐ Yes ☐ No

Attorney for School(s):	<i>Click or tap here to enter text.</i>
Address:	<i>Click or tap here to enter text.</i>
Phone:	<i>Click or tap here to enter text.</i>



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Email Address:	<i>Click or tap here to enter text.</i>
Number of Schools Representing	<i>Click or tap here to enter text.</i>
Years of experience with Ohio Charter Schools	<i>Click or tap here to enter text.</i>

Fiscal Officer:	<i>Click or tap here to enter text.</i>
Address:	<i>Click or tap here to enter text.</i>
Phone:	<i>Click or tap here to enter text.</i>
Email Address:	<i>Click or tap here to enter text.</i>
Number of Schools Representing:	<i>Click or tap here to enter text.</i>
Years of Experience with Ohio Charter Schools	<i>Click or tap here to enter text.</i>

Will there be a Management Company?	☐ Yes ☐ No
If yes, please complete the following:	

Organization Name: *Click or tap here to enter text.*

Contact Person: *Click or tap here to enter text.*

Phone: *Click or tap here to enter text.*

Email Address: *Click or tap here to enter text.*

Management Organization EIN: *Click or tap here to enter text.*

Management Organization IRN: *Click or tap here to enter text.*

**If a location has not been determined at the time of this application, please indicate the city or township where the market research was conducted.*



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SECTION 2 – GOVERNING AND MANAGEMENT STRUCTURES

The Governing and Management Structure play a critical role in starting a school. Team members should have a varied range of expertise.

2a – GOVERNING AUTHORITY MEMBERS

Scoring Rubric: To receive a “Meets” on the question under this section:

- There are at least three (3) Governing Authority members listed
- There must be a resume for each Governing Authority member
- All resumes must have current contact information (email address, mailing address, phone number)
- All members are located (home or work) within 50 miles of the proposed school location

List all the members of the Governing Authority, provide an email address for each member and provide a resume for each member with current contact information including email address, mailing address, and phone number.

Name:

Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.

Email Address:

Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.
Click here to enter text.

Upload as a single PDF document titled: “[Attachment 2a – Governing Authority Resumes](#)”

2b - GOVERNING AUTHORITY STRUCTURE

Scoring Rubric: To receive a “Meets” on this question the Governing Authority Structure statement or bylaws must contain:

- The minimum number of members
- How and when meetings are held
- The length of Governing Authority member terms
- Conditions for removal of a Governing Authority member
- Information on Governing Authority member recruitment
- Specific to Ohio community schools

Describe the Governing Authority structure, including the number of members, how/when meetings will be held, terms for members, conditions for removal of a Governing Authority member, and recruitment of new



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members, etc. (This information is typically contained in the bylaws). This structure must be aligned with Ohio requirements for community schools. A draft of the bylaws may be uploaded as a response.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: “[Attachment 2b – Governing Authority Structure](#)”

2c – ORGANIZATIONAL STRUCTURE

***Scoring Rubric:** To receive a “Meets” on this question, the applicant’s organizational chart will be uploaded, a job description or resume for each of the day-to-day operational roles will be uploaded, and the organizational structure will identify specific individuals or roles who will be responsible for the day-to-day operations of the school in each of the following categories:*

- School leader/Principal
- Testing and Assessments
- Human Resources
- Training and Professional Development
- Building Maintenance and related services
- Marketing/Enrollment
- Purchasing/Technology
- Sponsor Compliance
- Finance
- Education Management Information Systems
- Federal Programs.

If the Management Organization has schools currently sponsored by St. Aloysius, then the Organizational Chart and Job Descriptions/Resumes attachment does not need to be provided. Please select N/A below.

☐ N/A; Organizational Chart is not needed. Sponsor has on file.

Upload as a single PDF document titled: “[Attachment 2c – Organizational Structure and Job Descriptions/Resumes](#)”

2d – BUSINESS AND GROWTH PLAN

***Scoring Rubric:** To receive a “Meets” on this question, a formal statement of attainable business goals has been provided along with the plans for reaching the business goals. The business goals should contain information on the academic, financial stability and operational goals of the company. The answer must also include information on the expected growth (satellites/new schools) and the metrics that the school will use to determine if it is meeting the expected growth targets. Business goals should be SMART.*



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Provide the following:

- 1) A formal statement of the management company's business goals,
- 2) The reasons the business goals are attainable,
- 3) The plans for reaching the business goals which contains information on the academic, financial stability and operational position of the organization over multiple years,
- 4) A statement about the expected growth and the metrics used to determine if the growth is met.
- 5) Business plan goals that follow the SMART method of measurement.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: "[Attachment 2d – Business and Growth Plan](#)"

2e – COMPLIANCE ASSESSMENTS

Scoring Rubric: To receive a "Meets" on this question, all site visits from the previous school year for schools not currently sponsored by St. Aloysius were uploaded and there are no non-compliant items for any school operated by the management organization or school leader. If N/A is selected below, the Compliance Assessment from eight (8) randomly selected schools will be gathered, and the reviewers will score this section based upon the prior Compliance Assessments for those schools.

As part of the application, the compliance site visit reports from the previous school year will be collected and reviewed for all schools managed by the replicator. CSS staff will collect compliance site visit reports for schools currently sponsored by St. Aloysius. Upload copies of all reports of site visits conducted by another sponsor from the previous school year if the applicant has less than eight (8) schools sponsored by St. Aloysius.

If the applicant is a Management Organization and has more than eight (8) schools sponsored by St. Aloysius, then the applicant will not need to provide the Compliance site visit reports for any schools. Please select N/A below.

☐ N/A; The applicant is a Management Organization that has more than eight (8) schools sponsored by St. Aloysius.

Click or tap here to enter text.

Upload as a single PDF document titled: "[Attachment 2e – Compliance Assessments](#)"



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PROBATION/SUSPENSION

Scoring Rubric: This question is not scored on the rubric.

Have any of the schools managed by the replicator been on probation and/or received an intent to suspend notice.

☐ Yes ☐ No

If “Yes” to the above question, provide copies of all probation or intent to suspend notices and school responses as a PDF attachment. Please provide a brief explanation as to the circumstances that led to probation or notice of intent to suspend.

Click or tap here to enter text.

Upload as a single PDF document titled: “[*Attachment – Probation or Suspension Notice*](#)”



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SECTION 3 – EDUCATION PLAN

Scoring Rubric: The following question is not scored on the scoring rubric.

Describe your school and what you think will make it unique.

Click or tap here to enter text.

3a – MISSION, VISION, AND PHILOSOPHY

Scoring Rubric: To receive a “Meets” on this question, there must be a mission statement with intent and purpose, a vision statement with anticipated operation, function, and success of the school over time, and there must be a philosophy which describes values and beliefs by which the school will operate.

Identify the school’s mission statement, which includes intent and purpose. Identify the school’s vision statement including anticipated operation, function, and success over time. Identify the school’s philosophy which describes the values and beliefs by which the school will operate. If you do not have an existing document to attach, please use the textbox provided below.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: “[Attachment 3a – Mission, Vision & Philosophy](#)”

3b – EDUCATION PLAN

Scoring Rubric: To receive a “Meets” on this question, the applicant has provided specific standards for all core content; specific standards for all non-core content (i.e. physical education, music, art, technology); and contains information on social-emotional learning as well as having information on the four learning domains.

Please identify the school that is being replicated and why this school was chosen to be replicated. If there are multiple schools being replicated for different locations, please assign one of the schools that are being replicated to each location contained in this Application and identify why the designated school was chosen for each location. Please review the List of Community Schools which may be Replicated under Criteria Two per the Ohio Department of Education when identifying the school that is being replicated.

If the school that is being replicated is not sponsored by St. Aloysius, please attach the Education Plan of the school(s) being replicated as a PDF.

Click or tap here to enter text.

Upload as a single PDF document titled: “[Attachment 3b – Education Plan](#)”



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3c – RECRUITMENT

Scoring Rubric: To receive a “Meets” on the questions under this section, the applicant has provided the following:

- *A plan for the recruitment of teachers*
- *The plan will have specific details as to the process of receiving applications, interviewing, and offering positions*

Describe how you plan to recruit quality teachers. If you do not have an existing document to attach, please use the textbox provided below.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: “[Attachment 3c – Recruitment](#)”

3d – HIRING PROCESS

Scoring Rubric: To receive a “Meets” on the questions under this section, the applicant has provided a plan that specifically describes the steps that will be taken to ensure that teachers and faculty that are offered positions have values that align with the school’s core principles.

Provide a plan for the school to hire faculty and staff with values that align to the school’s core principles (mission/vision/philosophy). If you do not have an existing document to attach, please use the textbox provided below.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: “[Attachment 3d – Hiring Process](#)”

3e – RECORD OF SUCCESS IN ACADEMICS

Scoring Rubric: To receive a “Meets” on the questions under this section, the applicant has provided a list of each school that are not currently sponsored by St. Aloysius, including the 5 criteria listed below and all of the applicant’s managed schools are fair or better in performance.

Provide a list of each school that is not currently sponsored by St. Aloysius ever affiliated with the management organization, or its individuals, or school leaders (for self-managed schools), that include the following: 1) Names of school(s); 2) Dates of affiliation with the school(s); 3) Number of students served by year; 4) for the years affiliated with the school: 4a) the School’s overall grade; 4b) the School’s Progress Grade; and 4c) the School’s Performance Index Score; 5) A summary for the school(s) describing challenges encountered and/or successes achieved in the school(s)’ academic performance.



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Note: if any schools are located outside of Ohio, provide similar or equivalent measures for Item 4 for that state. If any of this information is not available, please explain in the attachment and provide supplemental information. The reviewers will review gathered academic information for all of the Management Organization's schools currently sponsored by St. Aloysius.

Click or tap here to enter text.

Upload as a single PDF document titled: "[*Attachment 3e – Record of Academic Success*](#)"



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SECTION 4 – OPERATIONS

4a – SCHOOL MODEL AND COMMUNITY ANALYSIS

Scoring Rubric: To receive a “Meets” on the questions under this section, the applicant has provided the following:

- A description of the current educational offerings
- Explain how the school model will meet the needs of the community
- A list of all schools within a two (2) mile radius
- An analysis of the community

Provide the following:

- a) A description of the current educational options or offerings available in the community and how the school model will serve the unique needs/characteristics of the community that the school’s students will be drawn from.
- b) List of all schools (traditional and community) within a two (2) mile radius that offer the same grades that this school is offering.
- c) Provide an analysis of the community in the following areas:
 - Real Estate Market (rental property, insurance rates, property taxes)
 - Availability of transportation (such as bus lines)
 - Enrollment fluctuation in surrounding schools
 - Job growth
 - Number and age range of students in the surrounding areas of the proposed school
 - Crime rates.

If you do not have an existing document to attach, please use the textbox provided below.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: “[Attachment 4a – School Model and Community Analysis](#)”

4b – COMMUNITY SUPPORT

- *Scoring Rubric:* To receive a “Meets” on this question, provide data showing the community support for the school and letters of support or surveys dated within one (1) year of the application from individuals or organizations within the community.

Provide data showing the community support for the school and letters of support or surveys from local residents indicating a need/desire for this type of community school. Any letters of support or surveys must be dated within one (1) year of the application date and specifically support this school in this location. In the



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alternative, the applicant can provide letters of support from community organizations that specifically support this school for partial credit on this question.

Upload as a single PDF document titled: "[Attachment 4b – Community Support](#)"

4c – RECRUITMENT, MARKETING PLANS, AND STUDENT ENROLLMENT

Scoring Rubric: To receive a "Meets" on this question, the description should contain each of the four (4) criteria noted below, and the evidence provided must reflect a realistic and attainable plan to recruit students and maintain enrollment. This should align with the enrollment projections below.

Provide the following:

- a) A description of the school's current recruitment and marketing plans.
- b) A description of the plans to maintain student enrollment.
- c) Explain the plan to counter attrition at all grade levels.
- d) A description of future marketing strategies.

(Examples of evidence of Recruitment and Marketing Plans are copies of promotional or recruitment materials including media plans, marketing plans, open house schedules, etc.)

If you do not have an existing document to attach, please use the textbox provided below.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: "[Attachment 4c – Recruitment and Marketing Plans](#)"

4d – EXPERIENCE WITH STUDENT DEMOGRAPHICS OF THE PROPOSED COMMUNITY

Scoring Rubric: To receive a "Meets" on this question, a formal statement is provided showing that there is adequate and relevant experience with student demographics that are similar to the demographics of the community for the proposed location.

Describe and provide data evidencing experience with student demographics that align with the community of the proposed school location. If you do not have an existing document to attach, please use the textbox provided below.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: "[Attachment 4d - Experience with Student Demographics](#)"



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4e - ENROLLMENT PROJECTIONS

Scoring Rubric: To receive a “Meets” on this question, the applicant will provide a minimum enrollment of one hundred (100) students first year. If the applicant does not include at least one hundred (100) students within the school’s first year of operation, a separate narrative should be provided to explain for partial credit.

Enter projected enrollment in the spaces below. Enter N/A for grades not served. Please note that Ohio law requires a total of at least twenty-five (25) students be fully enrolled to open. These projections will be considered in conjunction with the Governance and Management, Operations, Academics and Financial portions of the application.

Grade	Year 1	Year 2	Year 3	Year 4
Kindergarten	0	0	0	0
1 st Grade	0	0	0	0
2 nd Grade	0	0	0	0
3 rd Grade	0	0	0	0
4 th Grade	0	0	0	0
5 th Grade	0	0	0	0
6 th Grade	0	0	0	0
7 th Grade	0	0	0	0
8 th Grade	0	0	0	0
9 th Grade	0	0	0	0
10 th Grade	0	0	0	0
11 th Grade	0	0	0	0
12 th Grade	0	0	0	0
Total # of Students	0	0	0	0



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4f – SITE SPECIFICS

Scoring Rubric: To receive a “Meets” on this question, the applicant will either provide the information for the facility and the facility will meet the needs of the students or the applicant will provide a list of potential properties and the potential properties being reviewed will meet the needs of the students.

The physical location of the school is important, and the facility must not only be set up to meet the educational needs of the students but must also comply with state and federal restrictions to provide a safe learning environment. Review the descriptions below and determine which best fits the current status of the school's facilities. Please only answer the questions in the corresponding section that has been selected.

☐ **THE SITE FOR THE FACILITY HAS BEEN SECURED:** The physical location of the building or buildings has been determined and either a lease agreement has been signed or a lease agreement is currently under negotiation regarding the physical location of the building.

If so please complete the following:

1) Address of the Facility:

Click here to enter text.

2) Site plan of the facility including square footage, number of classrooms, size of classrooms, common areas, recreational space:

Click here to enter text.

3) Any other occupants or uses of the facility:

Click here to enter text.

4) How the facility meets the needs of the targeted students:

Click here to enter text.

☐ **THE SITE FOR THE FACILITY HAS NOT BEEN SECURED:** The applicant has not selected the physical location of the facility.

If checked, please complete the following.

Provide the following: 1) A description of the efforts to secure a school facility and prepare it for use by the intended opening date of the school, 2) Identify the parties responsible for securing the facility, and 3) For those identified as being responsible for securing the facility, their experience in locating potential school properties; or 2) a list and description of all potential properties that are under review, including information regarding 1) The address of each potential property under review, 2) The cost of each potential property, 3) The square footage of each potential property, 4) The number and size of classrooms of each potential property, 5) The



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common areas of each potential property, 6) The recreational space for each potential property, and 7) The renovation budget and timeline that will be needed to make each potential property useable as a school facility.

Click or tap here to enter text.

**If a location has not been determined at the time of this application, please indicate the city or township that the market research was conducted for in the Local School District and Proposed Address of the School rows.*

OWNERSHIP/CONFLICT OF INTEREST

LEASE HAS BEEN EXECUTED:

☐ Letter is required because of relationship between landlord and operator

☐ Attached letter from Independent Real Estate Professional

☐ Letter is NOT required because there is no relationship between landlord and operator

LEASE HAS NOT BEEN EXECUTED:

☐ Letter is required because of anticipated relationship between landlord and operator

☐ Attached letter from Independent Real Estate Professional

☐ Letter is NOT required because there will not be any relationship between landlord and operator

If a development team member signs the lease, explain how potential conflicts will be resolved if that person becomes a school employee or governing authority member.

Click or tap here to enter text.

If applicable, upload as a single PDF document titled: "[Attachment– Letter from Real Estate Professional](#)"

4g- STUDENT SAFETY AT LOCATION

Scoring Rubric: To receive a "Meets" on this question, the applicant will describe a review of all business types within a ¼ mile radius of the location or the proposed location and describe any concerns for student safety.



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Please examine the location, list all business types within a $\frac{1}{4}$ mile radius of the location, and describe or identify all of the potential concerns for student safety based upon the location of the school. Examples of potential concerns for student safety could be high traffic at student crossings; dangerous businesses in the area; sex offender shelters; or drug and alcohol rehabilitation facilities. If you do not have an existing document to attach, please use the textbox provided below.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: “[*Attachment 4g – Student Safety at Location*](#)”



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SECTION 5 – FINANCES

5a – OPERATIONAL BUDGET

Scoring Rubric: To receive a “Meets” on this question, a budget should be provided, be complete, align with the enrollment projections in the application, and realistically reflect enrollment, revenue, and expenditures of the school.

Provide the school’s first year budget with monthly detail showing expected cash flow assets and liabilities. The information in the budget should align with the enrollment projections listed in the application. Should the anticipated enrollment be lower in free and reduced lunch, please consider the impact of not receiving the maximum DPIA funds in making the projections.

Upload as a single PDF document titled: “[*Attachment 5a – Operational Budget*](#)”

5b – THREE-YEAR FORECAST

Scoring Rubric: To receive a “Meets” on this question, the school’s three-year forecast should be provided, be on the Ohio Department of Education and Workforce’s School Financial Forecast Template, be complete, and realistically reflect the assets, liabilities, anticipated enrollment, anticipated revenue, and anticipated expenditures of the school.

Upload as a single PDF document titled: “[*Attachment 5b – Three-Year Forecast*](#)”

5c – CONTRIBUTION OF FUNDS/INITIAL FUNDING OF SCHOOL

Scoring Rubric: To receive a “Meets” on this question, a description of a plan has been provided that demonstrates an ability to fund the school during the interim period until the foundation funding payments have begun. The school must indicate the sources of all funding, the amount of funding from each source, and how the funding will be deposited into the school’s account. If the applicant fails to adequately explain the sources and amounts of funding, the application may be disqualified from consideration.

In Ohio, new community schools do not receive foundation funding payments from the state until October. Foundation funding payments are the payments received from the state based upon student enrollment. Foundation funding payments are the payments received from the state based upon student enrollment. Describe the governing authority’s plan for funding the school’s operations until the first foundation funding payment is received in October. If you do not have an existing document to attach, please use the textbox provided below. Some examples of the funding may be from a line of credit, signed letters of commitment with the amount of funding, letters from lending institutions with a guaranteed approval amount, or a guarantee from



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a management organization that are acceptable to the sponsor. If the applicant will be using a line of credit, the line of credit should be provided along with information regarding the amount of the line of credit, any limitations or barriers to withdrawing, and the maximum withdrawal amounts

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: “[Attachment 5c –Initial Funding](#)”

5d – FINANCIAL STABILITY

Scoring Rubric: To receive a “Meets” on this question, a description of a plan has been provided that demonstrates an understanding of maintaining financial stability.

Describe the governing authority’s plan to maintain the school’s short- and long-term financial stability and viability, including the plan for potential reductions in expenditures relative to fluctuating enrollment. If you do not have an existing document to attach, please use the textbox provided below.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: “[Attachment 5d – Financial Stability](#)”

5e – RECORD OF SUCCESS IN FINANCIAL AND BUSINESS EXPERIENCE

Scoring Rubric: To receive a “Meets” on this question, there must be clear evidence that shows the management organization or school leader has a record of success in the financial and business aspects of starting and operating schools.

Please provide data evidencing the management organization’s or school leader’s (for self-managed schools) financial and business experience related to starting and operating a school. This information should include the following 4 items for each school listed: 1) Audits of affiliated schools; 2) The number of affiliated schools that owe money to the management company; 3) If schools owe money to the management company how much is owed by each school; and 4) The debt carried by the affiliated schools.

Click or tap here to enter text.

Alternatively, upload as a single PDF document titled: “[Attachment 5e – Record of Success in Financial and Business Experience](#)”



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5f – AUDITS

Scoring Rubric: To receive a “Meets” on this question, there must be no unresolved findings for recovery for any schools currently operated by the replicator.

As part of the application, the most recent audits for schools currently operated by the replicator will be collected and reviewed. If the Auditor of State has identified findings for recovery, please provide details below describing how these findings have been resolved. If there have not been any findings for recovery, please select N/A.

☐ N/A; There have not been any findings for recovery.

Click or tap here to enter text.

5g – BOARD APPROVED FINANCIALS

Scoring Rubric: To receive a “Meets” on this question, all requested information must be provided. Please note: CSS will collect this information for any school currently sponsored by St. Aloysius. If N/A is selected below, CSS will gather Board approved financials from eight (8) randomly selected schools, and the reviewers will score this section based upon the prior Board approved financials for those schools.

For any school not currently sponsored by St. Aloysius, upload the last three months of board approved financials and supporting board meeting minutes showing approval for all schools currently operated by the replicator.

If the applicant is a Management Organization and has more than eight (8) schools sponsored by St. Aloysius, then the applicant will not need to provide the Board approved financials for any schools, including those not sponsored by St. Aloysius. Please select N/A below.

☐ N/A; The applicant is a Management Organization that has more than eight (8) schools sponsored by St. Aloysius.

Click or tap here to enter text.

Upload as a single PDF document titled: “[Attachment 5g – Board Approved Financials](#)”