B.2.2 Expansion Application

When considering a request to expand a school, the IQS Management Leadership Team, on behalf of the Innovative Quality Schools Board, will give consideration to such a request following its criteria and in accordance with its evaluation process as applicable. Criteria to be considered includes:

1. The need and demand for expansion with supporting long-range enrollment projections.
2. A longitudinal record of demonstrated student academic performance and growth on statewide assessments in Chapter 120B and/or on other academic assessments that measure longitudinal student performance and growth benchmarks identified in its ScoreCard, approved by the charter school's board of directors and agreed upon with the authorizer.
3. A history of sound school finances and a finance plan to implement the expansion in a manner that promotes the schools' financial sustainability, and
4. Board capacity and an administrative and management plan to implement its expansion board of directors and agreed upon with the authorizer

IQS is required to file a supplemental affidavit by October 1st for the school to be eligible to expand in the next school year.

Applicant Information:

Application Organization:

Date Submitted:

Contact Person:

Address:

City, State, Zip:

Phone Number:

Email:

Age/Grades of Students:

Year of Opening:

Signature of Person Responsible for this Application:
I assure IQS that the information in this application is accurate.

_____
Printed Name   Signature   Date

NOTE: This application is to be used only for a proposed grade (including the addition of an early learning program) and/or site expansion of an existing IQS approved charter school.

Check the following: Will this school be a site expansion or a grade expansion? Note: IQS considers an online learning program to be a site expansion.

Site Expansion ☐   Grade Expansion ☐

Does this expansion include early learning programming? Yes ☐ No ☐

Names of persons directly involved with developing this application: (add additional rows/pages if necessary):

Name	Role	Minnesota Teacher File Folder Number (if applicable)

School Expansion Application

Directions: This application is the evidence that the expansion being proposed will be an excellent place for children and youth to learn and grow and for professionals to teach. Please know that IQS expectations are very high. If an organization contracts with a consultant to write the application, if IQS has questions we will direct our questions to the person responsible for the application, not the consultant writer. Please be certain to complete the entire application.

IQS review process and rubric to be used:

IQS will review the application using the criteria and rubric outlined below to determine if the school meets the requirements to implement an expansion, **as evidenced by meeting the expectation in all areas of the application**. IQS Leadership will develop a summary report, compiling the findings from the evaluation. The summary report will contain a recommendation regarding the approval of the expansion and will be shared with the IQS Board, who will make the final decision to approve the application.

Does not meet the expectation	Partially meets the expectation	Meets the expectation
The information provided was unclear. The applicant did not present an understanding of the criteria needed to implement the expansion.	Included some of the information for this criteria and the information was somewhat clear. The applicant only presented a minimal understanding of the criteria needed to implement the expansion.	Included most of the information for this criteria and the information was reasonably comprehensive. The applicant presented an understanding of the criteria and the capacity needed to implement the expansion.

Change in Location:

The following is applicable for expansion applications submitted in 2025 and after. For expansions approved prior to 2025, please use the Change in Location Application.

If a school with an approved expansion application or supplemental affidavit is considering a deviation from its originally proposed location, it is recommended that the school contact IQS to determine whether the deviation constitutes a change in location under section 124E.06. If so, the school must submit revisions to its expansion application for IQS's consideration of the proposed change.

At a minimum, revisions should address the following sections of the application:

- Part Two: Need and Demand, Site Expansion
- Part Five: Facility Identification
- Part Six: Fiscal - Five year Operational Budget

IQS will evaluate the school's proposed change in location using the criteria and rubric outlined in this application to determine whether the proposed move demonstrates sufficient market need and demand and supports the long-term viability of the school community.

The review process is intended to ensure a shared understanding between the school and IQS regarding the rationale, circumstances, and potential impact of changing the proposed location and may include conversations with school leadership and requests for additional or clarifying information.

Following completion of the review, IQS Leadership will prepare a comprehensive summary report of the proposed change in location. This report will be presented to the IQS Board of Directors, which holds the authority to make the final determination on approval of the application.

Please note that IQS follows all applicable legal requirements and expects schools to do the same. A school must not relocate without completing the required process and obtaining authorizer approval in accordance with section 124E.06. In the event of an emergency that renders a facility unsafe for students or staff, please contact IQS Leadership immediately to discuss the situation.

Part One: Executive Summary
   a. State the school's mission, vision, statutory purpose(s), age/grade levels to be served, number of students to be served and intended location(s).
   b. Briefly identify the educational philosophy and instructional model/approach to be used and how this expansion will meet the needs that are currently not being met in the community in which the school will be located.
   c. What aspect(s) of the proposed expansion will be innovative.

Part Two: Need and Demand
Grade or Program Expansion - complete this section for Need and Demand:
A quality application will:
   a. Provide a description and evidence of the need for a school expansion of this nature in the location identified. Be very specific as to these needs and document the source of any data used.
   b. Document the support of the community for a school in this location, including support from current and/or prospective families. If specific support is not evident, identify why the applicant believes the community will enroll students at this school.
   c. Include long-range enrollment projections with and without the proposed expansion.

Site Expansion ONLY - complete this section for Need and Demand:
Provide a market need and demand study that includes the six elements stated in Minnesota Statute 124E.02 (as amended): "Market need and demand study" means a study that includes the following for the proposed location of the additional site that supports all of the proposed grades, sites, and programs:
   (1) current and projected demographic information;
   (2) student enrollment patterns;
   (3) information on existing schools and types of educational programs currently available;
   (4) characteristics of proposed students and families;
   (5) availability of properly zoned and classified facilities; and
   (6) quantification of existing demand for the school or site.

"Need" means the reasons the proposed school is necessary in the community to be served.
   1. Provide a description and evidence of the need for a school of this nature in the location identified. Be very specific as to these needs and document the source of any data used. Applicants must identify the student performance of the locale where the school is to be located as a part of this justification and must use either MCA, MAP or other such data. However, other data may be used as well. If the need for the school is not based on student learning in area schools, be certain to provide the need in other ways.
   2. Identify the nearby district(s) and chartered schools and the educational programs being provided to aid in documenting that the proposed school will be different or the results will be better. (Note: this means the specific area where the school will be located. It is optional to include private schools.) This satisfies the Required Market Need and Demand Study element (3) information on existing schools and types of educational programs currently available.   Applicants can use the table below to document existing area schools and programs (add rows as needed):

School	Mission	Key Program Model Features	Grade Levels Served	Current Total Enrollment

3. Analyze the student enrollment patterns in the location identified, including consideration of the local programs available and identified in the table above. This satisfies the Required Market Need and Demand Study element (2) student enrollment patterns.

"Demand" means the desire of prospective families to enroll their children in the proposed school's education program.
1. Document the support of the community for a school in this location. If specific support is not evident, identify why the applicant believes the community will enroll students at this school.
2. Summarize feedback from community sessions, survey results, etc. including quantification of the existing demand. Provide the documentation for this feedback as an attachment to the application (survey forms, sign-in sheets from meetings, etc.) This satisfies the Required Market Need and Demand Study element (6) quantification of existing demand for the school or site.
3. Summarize the characteristics of proposed students and families. This satisfies the Required Market Need and Demand Study element (4) characteristics of proposed students and families.
4. Describe the local context of the proposed community or neighborhood that may influence a family's or student's decision to attend the proposed school. Your response should address both factors that may be appealing to families and factors that may cause them to hesitate.
5. Describe multi-year population trends—historical and projected—that are affecting the community or neighborhood of the proposed school location(s). Explain how these trends may impact interest in or demand for the proposed school. This, and the prior element (#4), satisfy the Required Market Need and Demand Study element (1) current and projected demographic information.

Provide long-range enrollment projections with and without the proposed site expansion.

Part Three: Mission, Innovation, and Goals A quality application will:
a. Mission: Provide the mission statement for the school and discuss how the expansion supports the mission.
b. Innovation: Identify which aspect(s) of the school expansion will be innovative…new and different. The proposal may refer the IQS reviewers to another section of the application for this information if that is appropriate
c. Accountability goals the school intends to accomplish:
   a. Identify specific academic and other goals related to the expansion that the school intends to accomplish and how these goals will be measured. The student learning goals must be measurable.

b. How will the information collected be used to improve the educational program specifically as well as other aspects of the school?

Part Four: Learning Program and Student Achievement A quality application will:
a. Provide the educational philosophy for the school expansion model.
b. Describe how this model of school is responsive to the needs of the proposed students and families that will be served and specifically assists educationally and economically disadvantaged students.
c. Describe how the school is successfully implementing the primary purpose of charter schools to improve all pupil learning and all student achievement.
d. Provide a history of student achievement data including both growth and proficiency measures for math and reading, as well as innovation-specific measures the school utilizes.
e. Include other student performance data. Examples include: attendance, behavior, graduation rates, etc.
f. Address any areas of low performance, explaining probable cause and outlining plans for improvement. If identified for support through the state, specifically address the identifying data and explain improvement plans.

Part Five: Facility Identification A quality application will:
a. Describe the school's plan including the timeline and process for determining space needs and space selection appropriate to the program model and enrollment.
b. Describe the current facilities needs assessment.
c. List currently available properly zoned and classified facilities and how each compares to the school's stated facilities needs. This satisfies the Required Market Need and Demand Study element (5).

Part Six: Fiscal - Five-year Operational Budget A quality application will:
a. Include a five-year budget projection with and without the expansion.
b. Clearly specify the assumptions being made for student enrollment, revenue and expenditures and projected fund balances.
c. Explain how the budget aligns with the mission and goals of the school.
d. Describe the financial impact of potential changes to staffing, food service, transportation and other expansion-related expenditures. Include any expenses the school might incur during the preoperational year.
e. Include the school's fund balance history, annual percentage as well as annual dollar amount, for at least the three most recent school years.
f. Describe the school's audit findings for at least the three most recent school years. Include action steps taken to correct any findings.

Part Seven: Board Capacity A quality application will:
a. Describe the school's current governance structure. Include an organizational chart, if applicable. Outline any changes in the governance or leadership structures that the school might consider to best support the proposed expansion.
b. Provide a current board roster that includes: Name, email, Role, Position, File Folder # (if applicable), and Term Dates.
c. Describe the board's capacity and involvement in providing oversight throughout the expansion process.

The remainder of this application only applies to schools applying for an early learning expansion.
<u>**Early Learning Programming**</u>

Comprehensive Child Assessment
How will the school assess each child's cognitive skills with a comprehensive child assessment instrument when the child enters and again before the child leaves the program to inform program planning and promote kindergarten readiness? A quality application will:
   a. Describe the assessment process used to measure individual child progress in all the prekindergarten and preschool instructional classes that includes the use of a standardized child assessment instrument, such as High Scope Child Observation Record (COR), Teaching Strategies Gold or Work Sampling System.
   b. Describe how the school will measure child progress, the assessment must be used at program entrance and program exit.

<u>Note</u>: At a minimum, the comprehensive assessment should measure children's progress in the domains of language and literacy and mathematical thinking. Other domains may include approaches to learning, general cognitive development, physical and motor development, social and emotional development, creativity and the arts.

Intentional Instructional Practices
How will the school provide intentional instructional practices aligned with the state's early childhood learning standards and kindergarten standards that are based on early childhood research and professional practice focused on children's cognitive, social, emotional, and physical skills and development and prepares children for the transition to kindergarten, including early literacy skills? A quality application will:
   a. Describe how program content and intentional instructional practices are aligned with the Early Childhood Indicators of Progress: Minnesota's Early Learning Standards (ECIPs) available on the MDE website. [Include a very brief description of the curriculum used in the early learning program, such as High Scope Preschool Curriculum or Opening the World of Learning (OWL)].
   b. Describe how the Early Childhood Indicators of Progress: Minnesota's Early Learning Standards (ECIPs) are incorporated into the program.
   c. Provide an overview of instructional practice to support children's early literacy skills development.

Kindergarten Transition
How will the program work to coordinate appropriate kindergarten transitions with parents and kindergarten teachers? A quality application will:
   a. Describe how the program plans for transition to kindergarten that includes meaningful coordination and planning with kindergarten teachers, and engages families in a variety of ways to support children's learning and successful transition to kindergarten.
   b. Describe the school's plan for providing guidance to families not enrolling their child in the charter school kindergarten program.

Coordinating with Relevant Community-Based Services
How will the program work to coordinate its services with relevant community based services in the surrounding area? A quality application will:
   a. Describe anticipated coordination activities such as referrals to community programs based on child needs, such as local public health, social services, mental health services, or other early learning or child care programs.

b. Describe how the program will coordinate with community organizations and how those resources are shared with families.

Staff Ratios and Licensure

How will the school work to ensure staff-child ratios of one-to-ten and maximum group size of 20 children with the staff being supervised by a licensed early childhood teacher? A quality application will:
a. Describe how the prekindergarten or preschool instructional program is provided and how ratios and group size are provided to ensure a high-quality early learning program.
b. For each prekindergarten and preschool instructional class, describe staff licensure area and MN teaching license file folder number and other credentials, as appropriate.

Teacher Content Knowledge

How will the school work to ensure its teachers are knowledgeable in early childhood curriculum content, assessment, and instruction? A quality application will:
a. Describe licensed staff training/professional development specific to early learning curriculum, instructional practices and assessment that has been completed in the past five year.

Early Childhood Health and Developmental Screening

How will the school work to ensure participating children have completed health and developmental screening within 90 days of program enrollment under Minnesota Statutes, sections 121A.16 to 121A.19? A quality application will:
a. Describe how and where participating children will receive health and developmental screening either through a traditional school district or comparable screening from health care provider (such as a Child and Teen Checkups) if the charter school is not providing the early childhood health and developmental screening program. It is not necessary for the charter school to provide the early childhood health and developmental screening, but must describe how children receive the comprehensive health and developmental screening to identify possible problems that may interfere with children's learning.
b. Describe the plan for those children who do not successfully complete early childhood screening.

FOR IQS USE - Summary of Evaluation Results:

Section	Does not meet the expectation	Partially meets the expectation	Meets the expectation
Executive Summary			
Need and Demand			
Mission, Innovation, and Goals			
Learning Program and Student Achievement			
Facility Identification			
Five-year Operational Budget			
Board Capacity			
Overall Evaluation			

Early Learning Specific Summary of Points (if applicable):

Section	Does not meet the expectation	Partially meets the expectation	Meets the expectation
Comprehensive Child Assessment			
Intentional Instructional Practices			
Kindergarten Transition			
Coordinating w/Relevant Community-Based Services			
Staff Ratios and Licensure			
Teacher Content Knowledge			
Early Childhood Health & Developmental Screening			
Overall Evaluation			

Forward this document and application to:

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