

Instructions for using the TEA Model Local Campus Partner Application Scoring Rubric

Districts may use this model scoring rubric or create their own. Districts that create their own rubric to vet potential operating partners must have the locally created rubric approved as part of the benefits application process.

- If this rubric is altered, the locally developed rubric **MUST** be submitted to TEA by the following due dates (emailed to TXP@tea.texas.gov) as part of the benefits approval process:
 - Friday, December 5, 2025, at 5 p.m. (Central Time), OR
 - No later than 5 days prior to the release of the district's local campus application (whichever date is sooner).

Last updated May 1, 2023.

TEA will not amend model documents (other than for formatting or typos) between the time that the To the Administrator Addressed letter is released and the current year due date.

Revision history:

Date of Update	Revision Summary
May 1, 2023	<ul style="list-style-type: none">• Updated model instructions (this page)• Minor formatting changes/typo corrections• Included criteria to align to updates to the model application:<ul style="list-style-type: none">○ High Quality Instructional Materials (Section 2, p. 5)○ Enrollment Policy that includes lottery description (Section 2, p. 11)○ Staff capacity for financial management (Section 4, p. 24)○ CMO/ESP information (Section 5, p. 29)• Updated success criteria numbering
April 7, 2021	<ul style="list-style-type: none">• Included success criteria related to existing organizations' years of operation (p. 28)• Added numbering to rubric criteria• Updated model instructions (this page)• Minor formatting changes/typo corrections
August 28, 2020	<ul style="list-style-type: none">• Original

Commented [DL1]: To do: renumber SC and updated SC appendix to match

Local Campus Application Rubric

Instructions for Evaluators:

1. In the [Evaluation Information](#) section, fill in your name, the name of the applicant group, and the name of the proposed school.
2. For each section of the application (sections 2-4 and 5, if applicable), you should do the following during your initial individual analysis of the proposal:
 - a. Highlight the elements of the success criteria that are met in the application and select a score under “Initial Review” for the success criteria (Meets, Partially Meets, or Does not Meet). *Note: a bulleted list of all success criteria can be found in the [appendix](#).*
 - b. Identify any missing or unclear evidence from the application in the “Areas for follow up in capacity interview” column under “Initial Review.” Be sure to include page references where applicable.
 - c. Select a subsection rating (Meets, Partially Meets, Does Not Meet):
 - i. The subsection ratings are included in the rows in gray above the success criteria for that subsection.
 - ii. The subsection rating should align to your success criteria ratings. For example, if there are four success criteria in a subsection, and an applicant only met two of those success criteria, you might select “Partially Meets” for your subsection rating.
3. Complete the [Application Summary Ratings](#) last.
 - a. Select the appropriate Section Summary Rating based on the ratings in each subsection.
 - b. Type a summary of your analysis of each section into the box provided. This should be a paragraph outlining the overall strengths or weaknesses of the application section as a whole. It should summarize your findings and should not be cut and pasted from your subsection analysis. Use this section to identify areas that should be explored during the capacity interview (if the applicant qualifies). Again, reference relevant page numbers.
4. If the applicant receives a score that qualifies them for a capacity interview:
 - a. Use the “After Capacity Interview” columns to provide your final evaluation of that success criteria based on the additional information you learn in the capacity interview.
 - b. Revise your subsection ratings and your [Application Summary Ratings](#) as needed.

Please note that your comments and evidence are as significant as your rating, and there should be clear alignment between the comments you provide and the rating you selected.

Evaluation Information

- Evaluators will use the following criteria to rate applicant responses.
- Ratings should be given based on tangible evidence provided in the application and/or capacity interview.
- Within each section, specific criteria define the expectations for a strong response that “Meets the Standard.” Evaluators will rate responses by applying the following guidance:

Meets the Standard: The response meets all of the criteria described in that section of the rubric. It reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information and evidence that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant’s capacity to carry out the plan effectively.

Partially Meets the Standard: The response meets some of the criteria or lacks detail and/or requires additional information in one or more areas.

<p>Does Not Meet the Standard: The response meets little to none of the criteria described in that section of the rubric, or it is wholly undeveloped or significantly incomplete; demonstrates lack of preparation and/or evidence; is unsuited to the mission of the authorizer or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.</p>		
<p>Evaluator Names: Orlando Riddick-HISD, Jacob Johnson - HISD, Lizzette Cooper-HISD, Caitlin Butler- HISD, Lupita Hinojosa- ESC-4</p>	<p>Applicant Organization Name: Houston ISD</p>	<p>Name of Campus(es): Challenge Early College High School</p> <p>Campus Capacity Interview Team: Jose Santos – Campus Principal, Mike Webster/Friends of Challenge Board Member, and Anne McClellan/Friends of Challenge Board Member</p>
<p>Application Summary Ratings</p>		
<p>COMPLETE THIS SECTION LAST</p>		
<p>Score Required for Capacity Interview (this will be the same for all applicants): Click or tap here to enter text.</p> <p>Does this applicant qualify for a capacity interview? Click or tap here to enter text.</p>		
<p>Section 2- Academic Plan The academic plan is complete, viable, and appropriate for the campus(es)</p>	<p>☒ Meets ☐ Partially Meets ☐ Does Not Meet</p>	<p>Summary Comments/ Capacity Interview Topics:</p>
<p>Section 3- Governance, Operating Plan, and Capacity The applicant organization has the governance structure, operating plan, and capacity necessary to successfully manage the campus(es)</p>	<p>☒ Meets ☐ Partially Meets ☐ Does Not Meet</p>	<p>Summary Comments/Capacity Interview Topics:</p>
<p>Section 4- Financial Plan The applicant organization has a financial plan that ensures sound financial management of the campus(es)</p>	<p>☒ Meets ☐ Partially Meets ☐ Does Not Meet</p>	<p>Summary Comments/Capacity Interview Topics:</p>

Section 5- Existing Partner/Experienced Partner Supplement The applicant organization has a successful track record and, if applicable, a sound ESP management plan	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	Summary Comments/Capacity Interview Topics: N/A	
Section 2: Academic Plan				
A. The response in this section is complete and cohesive		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
1. Applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
2. Applicant included attachments 1 (if applicable), 2, and 3	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
3. The overall academic plan is coherent and aligned with the stated mission and vision	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
4. The overall academic plan is aligned to and likely to meet the needs identified by the district for this campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
B. The applicant presented a clear plan to implement high-quality curriculum and effective instruction, and there is compelling justification and rationale for the curriculum and instruction plan		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation

5. The applicant has selected a curriculum that is aligned to Texas standards	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
6. The applicant has developed or has a viable plan to develop a scope and sequence for each grade level and/or content area to be used at the school(s)	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Add a paragraph about leveraging HISD's, HCC's, and College Board's curriculum and note with a reference to them and a link to the courses and if you have any adjustments that you will make this. Include 9 th and 10 th grade to the scope and sequence for CTE on page 24.	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
7. There is a plan for selecting and implementing High Quality Instructional Materials, and the applicant included what instructional materials will be used at the campus	☐ Meets ☒ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	The details explained for the resources to select HQIM was identified and detailed. Provided the resources and identified the links to them. Tie the instructional resources to a connection that runs throughout your application.
8. There is a plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Match the calendar with the narrative and <ul style="list-style-type: none"> Professional is misspelled Correct the last sentence and "at" 	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Identified and explained the professional development needed and its alignment to the calendar
9. The applicant's framework for instructional design and strategies: <ul style="list-style-type: none"> reflects the needs of the school's target population ensures all students meet or exceed the expectations of Texas state standards 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

• promotes critical-thinking skills				
10. There is a plan to identify and serve students with learning gaps	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	DOL's are a resource to inform instruction so that learning adjustments can be made. Review this area on page 23. Your PLC references on page 24 were explained more specific.
11. There is an appropriate plan to maximize instructional time	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
12. The applicant provided peer-reviewed research that backs up the program OR evidence of their experience with this program that includes metrics that demonstrate it has been successful	☐ Meets ☒ Partially Meets ☐ Does Not Meet	On pg 25 cite source and add links to refer. Letter G write a paragraph on AVID	☐ Meets ☐ Partially Meets ☐ Does Not Meet	Will build out research on AVID. Don't use accronyms and provide the link to AVID
13. There is an explanation of how this curriculum and instruction framework create a rigorous, engaging, and high-quality educational experience for students that could be reasonably replicated for the student population at the proposed campus(es)	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
14. There is a valid description of why this model is likely to be effective for the anticipated student population at the proposed campus(es) that is compelling and aligned to the needs that the district has identified	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Address a specific student population	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Articulated the evidence of the model and shard a through-line that identifies areas throughout the application that can be used as redundancy.

C. (High Schools Only) The applicant presented an appropriate plan that ensures students meet graduation standards		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
15. The applicant included an attachment with exit standards for graduating students. This attachment: <ul style="list-style-type: none"> Is aligned to state high school graduation standards Includes what students in the last grade served will know and be able to do Includes how the applicant will ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce) 	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Attachment is detailed as an exemplar	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
16. The applicant described systems and procedures that the school will implement for students at risk of dropping out or not meeting exit standards that are likely to meet the needs of students at the proposed campus(es)	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	You shared all the resources used to support students: before, during, and after. Add those details to the application. s
D. The applicant provided a plan and demonstrated capacity to serve students in special populations		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	

	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
17. The applicant provided an explanation of evidence from which the projection of anticipated special populations was derived that is reasonable given the district's student population	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
18. The organization or applicant team has experience in fulfilling state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
19. The applicant provided rationale for their understanding of and ongoing capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
20. The applicant included a plan for providing services to students in special education. The plan demonstrates that the applicant will successfully: <ul style="list-style-type: none"> appropriately identify students for special education services 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • serve students in the least-restrictive environment possible • provide appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities • provide the required and appropriate support services as outlined in students' Individualized Education Plans and 504 plans • ensure that students receiving special education services participate in standardized testing 				
<p>21. The applicant included a plan for providing services to emergent bilingual students. The plan demonstrates that the applicant will successfully:</p> <ul style="list-style-type: none"> • employ specific instructional programs, practices, and strategies to ensure academic success and equitable access to the general education curriculum and core academic program for emergent bilingual students 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • monitor and evaluate student progress and success of emergent bilingual students and exit them from services as appropriate • include emergent bilingual students in standardized testing • include emergent bilingual students in school wide educational, extra-curricular, and culture-building activities 				
22. The applicant included a plan for providing services to students identified as intellectually gifted. The plan demonstrates that the applicant will successfully: <ul style="list-style-type: none"> • identify students • provide specific instructional programs, practices, and strategies aligned to the needs of these students 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
E. The applicant provided a sound plan for student recruitment and enrollment		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
23. The applicant provided a student recruitment and marketing plan that includes safeguards for equal inclusion of all interested	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Describe the student population that are at risk	☒ Meets ☐ Partially Meets ☐ Does Not Meet	

students and families, including:				
<ul style="list-style-type: none"> those in poverty students who have struggled academically students with disabilities, and other youth at risk of academic failure 				
24. The applicant attached an Enrollment Policy that complies with state law and includes a lottery policy if more students choose to enroll at the campus than can accommodate	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
25. The applicant's Enrollment Policy includes safeguards or policies that ensure that the school will be open to all eligible students	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
F. The applicant provided a compelling plan for creating a positive school culture		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
26. The applicant described a vision for the culture of the school(s) that is aligned to the needs the district identified in its Call for Quality Schools	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
27. The applicant's vision for the school: <ul style="list-style-type: none"> promotes high expectations 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • will reasonably establish a positive and safe academic environment • will reasonably create shared ownership of intellectual and social development for all students, including those with special needs, ELs, and students at risk of academic failure 				
<p>28. The applicant included a plan for establishing the intended culture. This plan includes processes and procedures to:</p> <ul style="list-style-type: none"> • develop a common understanding of the intended school culture among staff and students • identify how the intended culture is put in practice and made evident in the daily life of the school • regularly assess and measure progress on student and staff experiences and course-correct when expected progress is not being made 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	<p>Pg 36 doesn't talk about regularly assessing the work</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet	<p>You directly addressed processes and procedures. Include the Rigor Relevance Relationship w/Respect RRRR that you shared with context to your application. Be sure to have it as a through-line in your application. Your Executive Summary should detail your compelling reason why Challenge exist.</p>
<p>29. The applicant included a plan for family engagement. This plan:</p> <ul style="list-style-type: none"> • includes methods the applicant will use to 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	<p>Pg 37 Need more narrative on how you engage parents with more context</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet	<p>You shared your family engagement processes, add them to the application</p>

<p>create an inclusive and welcoming environment</p> <ul style="list-style-type: none"> is likely to engage families in positive, constructive, and personalized ways 				
<p>30. The applicant included a plan for providing student support services (e.g., counseling, mentoring, external service referrals) that includes:</p> <ul style="list-style-type: none"> a program to proactively teach mental health and wellness skills to all students a process for staff to meet frequently to identify and monitor individual student needs a process to identify support service providers and to connect students with the support services (e.g., counseling, mentoring, external service referrals) that address their needs 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>31. The applicant included the systems and processes the school will use for tracking discipline referrals and interventions, including how they will identify trends and adapt activities accordingly</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>32. The applicant attached the student discipline policy/code of conduct for the proposed campus(es). This policy or code includes:</p> <ul style="list-style-type: none"> • appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture • legally sound policies for student discipline, suspension, and expulsion • protection of students' rights to due process 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
G. The applicant provided an assessment and evaluation plan that demonstrates their ability to track student progress		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
<p>33. The applicant included annual student performance goals that:</p> <ul style="list-style-type: none"> • include targets aligned with the state accountability system • meet the needs/desired outcomes the district wants to achieve with this partnership 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>34. The applicant included a plan (including the meeting structures and frequency) to</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

implement and interpret interim assessments that measure academic progress toward these annual goals throughout the school year				
<p>35. The applicant included a plan and system for collecting and analyzing student academic achievement data that includes:</p> <ul style="list-style-type: none"> • methods to report data to the school community that ensure that stakeholders have equal access to the information • processes and procedures to use the data to refine and improve instruction that include: <ul style="list-style-type: none"> ○ dedicated, scheduled time to provide training and support to school leadership and teachers in the use of data to improve instruction ○ qualified personnel to provide this training and support for school leaders and teachers 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
36. The applicant included corrective actions that they will take if they fall short of the academic goals stated in this section.	☐ Meets ☒ Partially Meets ☐ Does Not Meet	(Page 42) Only corrective actions are referenced after an accountability rating. What are the actions and process throughout the year if program needs corrective actions for culture, student	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Clairified the additional indicators for sub-pops and who will be responsible. Be sure to include your language on accountability and context around corrective actions. This area was your

I. The applicant organization is an eligible entity and includes sufficient staff to manage the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
41. The attached organizational chart indicates that the organization has already employed staff that will be engaged in daily, on-site school management routines	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
42. The daily responsibilities described in the chart include daily on-site school management routines that match the needs of the campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
43. The organization is one of the following eligible entities: <ul style="list-style-type: none"> • open-enrollment charter school • an institution of higher education as defined under Section 61.003 of the Texas Education Code (TEC),] • a private or independent institution of higher education as defined under TEC Section 61.003, or • an organization that is exempt from taxation under Section 501(c)(3) of the Internal Revenue Code 	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	

J. The applicant organization's board is independent of the district, meets legal requirements, and includes qualified members		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
44. The partner organization board is made up of at least three members	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
45. The partner organization board does not include any members of the district's board, the district superintendent, OR any members that are district employees involved in the selection or oversight of the district charter partnership	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
46. The bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances provided by the potential partner assure the current and ongoing independence of the partner board from the district board	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
47. The board member information sheets and resumes for each proposed board member demonstrate that, collectively, the board members have demonstrated experience and success in:	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Flag conflict of interest of Mike Webster being on Board	☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> the implementation and oversight of education programs financial oversight of schools and/or non-profit organizations implementing legal requirements for schools and/or non-profit organizations community engagement 				
<p>48. The applicant included a plan to grow and/or sustain board membership, including:</p> <ul style="list-style-type: none"> a description of the education, finance, law, and community engagement and other qualifications that current or future board members must possess a plan to recruit board members with the necessary experiences in education, finance, law, and community engagement described in the preceding bullet point proposed training requirements and an orientation plan for new board members proposed ongoing training requirements for board members that will ensure their continued 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	<p>(Page 46)Needs to expand on training and ongoing requirements</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet	

ability to govern charter campuses within the district				
49. The applicant described how the board will evaluate the success of the school(s) and school leader(s), including: <ul style="list-style-type: none"> the criteria by which the board will evaluate the school(s) and leader(s) meetings that occur frequently enough for the board to have an understanding of the school and leader's performance the roles and responsibilities of any standing committees 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Not aligned to the contract. (Page 46) Role and responsibilities of committees not specified.	☒ Meets ☐ Partially Meets ☐ Does Not Meet	You shared varied metrics that can be used also include performance contract metrics two of which are maintaining your TEA accountability and closing the achievement gap.
K. The applicant team has the necessary experience and capacity to manage the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
50. The applicant team is comprised of members with experience and measurable success in school leadership, administration, and governance	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Align titles throughout application (Sup or CEO)	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
51. The applicant team is comprised of members with experience and measurable success in implementing systems for curriculum, instruction, and assessment	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

52. The applicant team is comprised of members with experience and measurable success in performance management	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
53. The applicant team is composed of members with experience and measurable success in parent and community engagement	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Provide more clarity and detail for scope of family and community engagement	☒ Meets ☐ Partially Meets ☐ Does Not Meet	You shared previously your family engagement. This is an example of a through-line that can be used throughout your application. Add the details
54. The proposed school leader has experience in and demonstrated ability to design, launch, and lead a school and implement the specific educational program being proposed OR the board has a plan (with appropriate timeline) to recruit and retain a leader with the ability to implement the specific educational program being proposed	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
55. The applicant provided measurable performance expectations for the school leader that are: <ul style="list-style-type: none"> aligned to the mission of the school aligned to a trajectory of improved student outcomes for the specific campus or campuses to be operated by the organization appropriate for both the school launch in the first year of operation to 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Need specifics and alignment to contract expectations. (Page 51) goals need to be specific and measurable in the identified sections.	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Again align your metrics into this area to detail accountability and expectations.

sustainability of improved outcomes in future years				
L. The applicant has a clear plan to recruit and retain quality staff at the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
56. The applicant's recruitment and hiring strategy includes: <ul style="list-style-type: none"> • criteria and protocols for hiring for all campus roles • predetermined selection criteria that demonstrate high standards • selection criteria aligned to the mission and academic program the school will offer • a hiring protocol and timeline that ensure that the school is fully staffed by July 1 of each year 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
57. The applicant's staff development and retention plan includes: <ul style="list-style-type: none"> • an induction program that is tailored to any unique or particularly challenging aspects of the educational program described in Section 2 • the method the applicant will use to evaluate teacher performance and 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>growth, including the evaluation tools and processes to be used</p> <ul style="list-style-type: none"> the method, resources, and timeline that the applicant will use to support school staff personnel with demonstrated experience and qualifications to provide professional development and facilitate adult learning how the applicant will identify and retain high-performing staff 				
<p>58. The applicant described a process for remedying unsatisfactory leadership and/or teacher performance that includes:</p> <ul style="list-style-type: none"> how underperforming staff are identified the steps and documentation that the applicant will take and collect to remedy the performance if the school staff will remain district employees, how the applicant will work with the district to change the assignment of the staff 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
M. The applicant has a valid facilities plan	Meets ☒		Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	

	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
59. The application identifies an appropriate and viable proposed school facility, or the application includes a facilities plan. If the application includes a facilities plan, the plan includes: <ul style="list-style-type: none"> the timeline for identifying the facility how the facility will be financed how the applicant will renovate and/or ensure code compliance for a facility how the facilities plan will meet the requirements of the educational program and anticipated student population 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
Section 4: Financial Plan				
N. The response in this section is complete and cohesive		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
60. The applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
61. The applicant included attachment 10	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

62. The overall financial plan is: <ul style="list-style-type: none"> coherent aligned with the stated mission and vision aligned with the academic plan (section 2) aligned with the governance and operations plan (section 3) 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
O. The applicant demonstrated that the organization has the capacity, processes, and personnel necessary to meet the financial needs of managing the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
63. The applicant's description of the organization's systems, policies, and processes for financial planning, accounting, purchasing, and payroll that are aligned with and will allow the school to meet financial accountability requirements	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
64. The applicant organization has (or has plans to hire) staff the with necessary qualifications to manage the organization's financial systems, policies, and processes	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
65. The application describes: <ul style="list-style-type: none"> the organization's internal controls that 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>meet the standard outlined in the Financial Accountability System Resource Guide (Module 2: Special Supplement – Charter Schools)</p> <ul style="list-style-type: none"> the applicant’s knowledge of and ability to meet financial reporting requirements how the applicant will conduct independent annual financial and administrative audits that meet district requirements 				
<p>66. The financial plan describes roles and responsibilities among the administration and governing board regarding school finance that align with the internal controls described in the preceding criteria</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>67. The financial plan includes the methods the applicant will employ to publicly adopt the school’s budget and disseminate its annual audit and an annual report</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>68. The operating budget and narrative include reasonable:</p> <ul style="list-style-type: none"> grant/fundraising assumptions, amount and sources of all anticipated funds, property, or other 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable), and				
<ul style="list-style-type: none"> projected cost to implement the academic model described in this application 				
69. The organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated includes: <ul style="list-style-type: none"> how the organization will identify the specific areas of financial weakness what corrective actions the organization will take to remedy specific areas of financial weakness and/or how a corrective action plan will be developed how the organization will ensure a contingency or corrective action plan is successfully implemented 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
Section 5: Existing Partner/Experienced Partner Supplement N/A				
P. The response in this section is complete and cohesive		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation

70. The applicant responded to all questions in this section	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
71. The applicant included supplemental attachments 1 and 2, and supplemental attachment 3 (if applicable)	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
72. The supplemental information demonstrates the organization has experience and success in implementing the model described in the rest of the application	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
Q. The applicant has demonstrated a successful academic and financial track record		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
73. The applicant provided evidence of measurable success in: <ul style="list-style-type: none"> • academic success • serving populations similar to the population the applicant intends to serve • successful management of non-academic school functions (e.g., back-office services, school operations, extracurricular programs) 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
74. The applicant's independent financial audit report and its most recent annual report of the	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>experienced partner applicant or ESP/CMO:</p> <ul style="list-style-type: none"> • demonstrates the financial health of the organization • provides reasonable assurance that the organization will maintain this financial health when operating the proposed campus(es) in this district 				
<p>75. The applicant does not have a history of charter revocations, non-renewals, withdrawals, or failures to open</p>	☐ Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Does Not Meet	
<p>76. If the applicant is partnering with an F rated campus, the applicant has:</p> <ul style="list-style-type: none"> • Been in existence for at least three years prior to undertaking the management of the district campus • Managed multiple campuses for multiple years • Has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses 		N/A		

R. If applicable, the applicant provided a clear Education Service Provider (ESP) or Charter Management Organization (CMO) plan		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
77. The management agreement between the ESP or CMO and the applicant organization includes: <ul style="list-style-type: none"> • a detailed description of the roles and responsibilities of the ESP or CMO • a detailed explanation of the scope of services and costs of all resources to be provided by the ESP or CMO • a detailed description of the oversight and evaluation methods that the board will use to oversee the ESP or CMO, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP's or CMO's progress toward achieving agreed-upon goals 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • a detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory • a detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP or CMO and the schedule on which the ESP or CMO will receive compensation • a detailed explanation of the financial responsibilities of the ESP or CMO, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP or CMO can make without obtaining board approval, and what reports the ESP or CMO will submit to the board on financial performance and on what schedule 				
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<ul style="list-style-type: none"> • a detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP or CMO and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed • a detailed description of the grounds for which the ESP/CMO or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause • an explanation and justification of any indemnification provisions in the event of default or breach by either party 				
78. The applicant included a plan for the operation of the	☐ Meets	N/A	☐ Meets	

school in the case that the management agreement is terminated that includes how this plan would be enforced and carried out	☐ Partially Meets ☐ Does Not Meet		☐ Partially Meets ☐ Does Not Meet	
79. The applicant included: <ul style="list-style-type: none"> assurance that the board is independent from the ESP or CMO and self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed ESP or any affiliated business entities evidence of the board's independence 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
80. The applicant included a clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP/CMO supervisory responsibilities	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
81. The applicant included a detailed explanation and	☐ Meets	N/A	☐ Meets	

compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement	☐ Partially Meets ☐ Does Not Meet		☐ Partially Meets ☐ Does Not Meet	
82. The applicant included a detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused by the school	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

Section 2: Academic Plan

A. The response in this section is complete and cohesive

1. Applicant responded to all questions in this section
2. Applicant included attachments 1 (if applicable), 2, and 3
3. The overall academic plan is coherent and aligned with the stated mission and vision
4. The overall academic plan is aligned to and likely to meet the needs identified by the district for this campus

B. The applicant presented a clear plan to implement high-quality curriculum and effective instruction, and there is compelling justification and rationale for the curriculum and instruction plan

5. The applicant has selected a curriculum that is aligned to Texas standards
6. The applicant has developed or has a viable plan to develop a scope and sequence for each grade level and/or content area to be used at the school(s)
7. There is a plan for selecting and implementing High Quality Instructional Materials, and the applicant included what instructional materials will be used at the campus
8. There is a plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials
9. The applicant's framework for instructional design and strategies:
 - reflects the needs of the school's target population
 - ensures all students meet or exceed the expectations of Texas state standards
 - promotes critical-thinking skills
10. There is a plan to identify and serve students with learning gaps
11. There is an appropriate plan to maximize instructional time
12. The applicant provided peer-reviewed research that backs up the program OR evidence of their experience with this program that includes metrics that demonstrate it has been successful
13. There is an explanation of how this curriculum and instruction framework create a rigorous, engaging, and high-quality educational experience for students that could be reasonably replicated for the student population at the proposed campus(es)
14. There is a valid description of why this model is likely to be effective for the anticipated student population at the proposed campus(es) that is compelling and aligned to the needs that the district has identified

C. (High Schools Only) The applicant presented an appropriate plan that ensures students meet graduation standards

15. The applicant included an attachment with exit standards for graduating students. This attachment:
 - Is aligned to [state high school graduation standards](#)
 - Includes what students in the last grade served will know and be able to do
 - Includes how the applicant will ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce)

16. The applicant described systems and procedures that the school will implement for students at risk of dropping out or not meeting exit standards that are likely to meet the needs of students at the proposed campus(es)

D. The applicant provided a plan and demonstrated capacity to serve students in special populations

17. The applicant provided an explanation of evidence from which the projection of anticipated special populations was derived that is reasonable given the district's student population
18. The organization or applicant team has experience in fulfilling state and federal obligations and requirements pertaining to students with disabilities, ELs, and students identified as intellectually gifted
19. The applicant provided rationale for their understanding of and ongoing capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, ELs, and students identified as intellectually gifted
20. The applicant included a plan for providing services to students in special education. The plan demonstrates that the applicant will successfully:
- appropriately identify students for special education services
 - serve students in the least-restrictive environment possible
 - provide appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities
 - provide the required and appropriate support services as outlined in students' Individualized Education Plans and 504 plans
 - ensure that students receiving special education services participate in standardized testing
21. The applicant included a plan for providing services to English Learners (ELs). The plan demonstrates that the applicant will successfully:
- employ specific instructional programs, practices, and strategies to ensure academic success and equitable access to the general education curriculum and core academic program for ELs
 - monitor and evaluate student progress and success of ELs and exit them from services as appropriate
 - include ELs in standardized testing
 - include ELs in school wide educational, extra-curricular, and culture-building activities
22. The applicant included a plan for providing services to students identified as intellectually gifted. The plan demonstrates that the applicant will successfully:
- identify students
 - provide specific instructional programs, practices, and strategies aligned to the needs of these students

E. The applicant provided a sound plan for student recruitment and enrollment

23. The applicant provided a student recruitment and marketing plan that includes safeguards for equal inclusion of all interested students and families, including:
- those in poverty
 - students who have struggled academically
 - students with disabilities, and
 - other youth at risk of academic failure
24. The applicant attached an Enrollment Policy that complies with [state law](#) and includes a lottery policy if more students choose to enroll at the campus than can accommodated
25. The applicant's Enrollment Policy includes safeguards or policies that ensure that the school will be open to all eligible students

F. The applicant provided a compelling plan for creating a positive school culture

26. The applicant described a vision for the culture of the school(s) that is aligned to the needs the district identified in its Call for Quality Schools
27. The applicant's vision for the school:
- promotes high expectations
 - will reasonably establish a positive and safe academic environment
 - will reasonably create shared ownership of intellectual and social development for all students, including those with special needs, ELs, and students at risk of academic failure
28. The applicant included a plan for establishing the intended culture. This plan includes processes and procedures to:
- develop a common understanding of the intended school culture among staff and students
 - identify how the intended culture is put in practice and made evident in the daily life of the school
 - regularly assess and measure progress on student and staff experiences and course-correct when expected progress is not being made
29. The applicant included a plan for family engagement. This plan:
- includes methods the applicant will use to create an inclusive and welcoming environment
 - is likely to engage families in positive, constructive, and personalized ways
30. The applicant included a plan for providing student support services (e.g., counseling, mentoring, external service referrals) that includes:
- a program to proactively teach mental health and wellness skills to all students
 - a process for staff to meet frequently to identify and monitor individual student needs
 - a process to identify support service providers and to connect students with the support services (e.g., counseling, mentoring, external service referrals) that address their needs
31. The applicant included the systems and processes the school will use for tracking discipline referrals and interventions, including how they will identify trends and adapt activities accordingly
32. The applicant attached the student discipline policy/code of conduct for the proposed campus(es). This policy or code includes:
- appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture
 - legally sound policies for student discipline, suspension, and expulsion
 - protection of students' rights to due process

G. The applicant provided an assessment and evaluation plan that demonstrates their ability to track student progress

33. The applicant included annual student performance goals that:
- include targets aligned with the state accountability system
 - meet the needs/desired outcomes the district wants to achieve with this partnership
34. The applicant included a plan (including the meeting structures and frequency) to implement and interpret interim assessments that measure academic progress toward these annual goals throughout the school year
35. The applicant included a plan and system for collecting and analyzing student academic achievement data that includes:
- methods to report data to the school community that ensure that stakeholders have equal access to the information

- processes and procedures to use the data to refine and improve instruction that include:
 - dedicated, scheduled time to provide training and support to school leadership and teachers in the use of data to improve instruction
 - qualified personnel to provide this training and support for school leaders and teachers
36. The applicant included corrective actions that they will take if they fall short of the academic goals stated in this section.
- There is a plan to take corrective action for both annual and interim goals that includes:
- a clear explanation of what would trigger such actions
 - who would implement the corrective actions

Section 3: Governance, Operating Plan, and Capacity

H. The response in this section is complete and cohesive

37. The applicant responded to all questions in this section
38. The applicant included attachments 4-9
39. The overall governance structure and operations plan is:
- coherent
 - aligned with the stated mission and vision
 - aligned with the academic plan (section 2)
 - aligned with the finance plan (section 4)
40. The overall governance plan is aligned to and likely to meet the needs identified by the district for this campus

I. The applicant organization is an eligible entity and includes sufficient staff to manage the campus(es)

41. The attached organizational chart indicates that the organization has already employed staff that will be engaged in daily, on-site school management routines
42. The daily responsibilities described in the chart include daily, on-site school management routines that match the needs of the campus
43. The organization is one of the following:
- open-enrollment charter school
 - an institution of higher education as defined under Section 61.003 of the Texas Education Code (TEC),]
 - a private or independent institution of higher education as defined under TEC Section 61.003, or
 - an organization that is exempt from taxation under Section 501(c)(3) of the Internal Revenue Code

J. The applicant organization's board is independent of the district, meets legal requirements, and includes qualified members

44. The partner organization board is made up of at least three members
45. The partner organization board does not include any members of the district's board, the district superintendent, OR any members that are district employees involved in the selection or oversight of the district charter partnership
46. The bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances provided by the potential partner assure the current and ongoing independence of the partner board from the district board

47. The board member information sheets and resumes for each proposed board member demonstrate that, collectively, the board members have demonstrated experience and success in:
- the implementation and oversight of education programs
 - financial oversight of schools and/or non-profit organizations
 - implementing legal requirements for schools and/or non-profit organizations
 - community engagement
48. The applicant included a plan to grow and/or sustain board membership, including:
- a description of the education, finance, law, and community engagement and other qualifications that current or future board members must possess
 - a plan to recruit board members with the necessary experiences in education, finance, law, and community engagement described in the preceding bullet point
 - proposed training requirements and an orientation plan for new board members
 - proposed ongoing training requirements for board members that will ensure their continued ability to govern charter campuses within the district
49. The applicant described how the board will evaluate the success of the school(s) and school leader(s), including:
- the criteria by which the board will evaluate the school(s) and leader(s)
 - meetings that occur frequently enough for the board to have an understanding of the school and leader's performance
 - the roles and responsibilities of any standing committees

K. The applicant team has the necessary experience and capacity to manage the campus(es)

50. The applicant team is comprised of members with experience and measurable success in school leadership, administration, and governance
51. The applicant team is comprised of members with experience and measurable success in implementing systems for curriculum, instruction, and assessment
52. The applicant team is comprised of members with experience and measurable success in performance management
53. The applicant team is composed of members with experience and measurable success in parent and community engagement
54. The proposed school leader has experience in and demonstrated ability to design, launch, and lead a school and implement the specific educational program being proposed OR the board has a plan (with appropriate timeline) to recruit and retain a leader with the ability to implement the specific educational program being proposed
55. The applicant provided measurable performance expectations for the school leader that are:
- aligned to the mission of the school
 - aligned to a trajectory of improved student outcomes for the specific campus or campuses to be operated by the organization
 - appropriate for both the school launch in the first year of operation to sustainability of improved outcomes in future years

L. The applicant has a clear plan to recruit and retain quality staff at the campus(es)

56. The applicant's recruitment and hiring strategy includes:
- criteria and protocols for hiring for all campus roles
 - predetermined selection criteria that demonstrate high standards

- selection criteria aligned to the mission and academic program the school will offer
- a hiring protocol and timeline that ensure that the school is fully staffed by July 1 of each year

57. The applicant's staff development and retention plan includes:

- an induction program that is tailored to any unique or particularly challenging aspects of the educational program described in Section 2
- the method the applicant will use to evaluate teacher performance and growth, including the evaluation tools and processes to be used
- the method, resources, and timeline that the applicant will use to support school staff
- personnel with demonstrated experience and qualifications to provide professional development and facilitate adult learning
- how the applicant will identify and retain high-performing staff

58. The applicant described a process for remedying unsatisfactory leadership and/or teacher performance that includes:

- how underperforming staff are identified
- the steps and documentation that the applicant will take and collect to remedy the performance
- if the school staff will remain district employees, how the applicant will work with the district to change the assignment of the staff

M. The applicant has a valid facilities plan

59. The application identifies an appropriate and viable proposed school facility, or the application includes a facilities plan. If the application includes a facilities plan, the plan includes:

- the timeline for identifying the facility
- how the facility will be financed
- how the applicant will renovate and/or ensure code compliance for a facility
- how the facilities plan will meet the requirements of the educational program and anticipated student population

Section 4: Financial Plan

N. The response in this section is complete and cohesive

60. The applicant responded to all questions in this section

61. The applicant included attachment 10

62. The overall financial plan is:

- coherent
- aligned with the stated mission and vision
- aligned with the academic plan (section 2)
- aligned with the governance and operations plan (section 3)

O. The applicant demonstrated that the organization has the capacity, processes, and personnel necessary to meet the financial needs of managing the campus(es)

63. The applicant's description of the organization's systems, policies, and processes for financial planning, accounting, purchasing, and payroll that are aligned with and will allow the school to meet [financial accountability](#) requirements

64. The applicant organization has (or has plans to hire) staff the with necessary qualifications to manage the organization's financial systems, policies, and processes
65. The application describes:
- the organization's internal controls that meet the standard outlined in the Financial Accountability System Resource Guide ([Module 2: Special Supplement – Charter Schools](#))
 - the applicant's knowledge of and ability to meet financial reporting requirements
 - how the applicant will conduct independent annual financial and administrative audits that meet district requirements
66. The financial plan describes roles and responsibilities among the administration and governing board regarding school finance that align with the internal controls described in the preceding criteria
67. The financial plan includes the methods that the applicant will employ to publicly adopt the school's budget and disseminate its annual audit and an annual report
68. The operating budget and narrative include reasonable:
- grant/fundraising assumptions,
 - amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable), and
 - projected cost to implement the academic model described in this application
69. The organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated includes:
- how the organization will identify the specific areas of financial weakness
 - what corrective actions the organization will take to remedy specific areas of financial weakness and/or how a corrective action plan will be developed
 - how the organization will ensure that a contingency or corrective action plan is successfully implemented

Section 5: Existing Partner/Experienced Partner Supplement

P. The response in this section is complete and cohesive

70. The applicant responded to all questions in this section
71. The applicant included supplemental attachments 1 and 2, and supplemental attachment 3 (if applicable)
72. The supplemental information demonstrates that the organization has experience and success in implementing the model described in the rest of the application

Q. The applicant has demonstrated a successful academic and financial track record

73. The applicant provided evidence of measurable success in:
- academic success
 - serving populations similar to the population that the applicant intends to serve
 - successful management of non-academic school functions (e.g., back- office services, school operations, extracurricular programs)
74. The applicant's independent financial audit report and its most recent annual report of the experienced partner applicant or ESP:

- demonstrates the financial health of the organization
 - provides reasonable assurance that the organization will maintain this financial health when operating the proposed campus(es) in this district
75. The applicant does not have a history of charter revocations, non-renewals, withdrawals, or failures to open
76. If the applicant is partnering with an F rated campus, the applicant has:
- Been in existence for at least three years prior to undertaking the management of the district campus
 - Managed multiple campuses for multiple years
 - Has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses
- R. If applicable, the applicant provided a clear Education Service Provider (ESP) or Charter Management Organization (CMO) plan**
77. The management agreement between the ESP/CMO and the applicant organization includes:
- a detailed description of the roles and responsibilities of the ESP/CMO
 - a detailed explanation of the scope of services and costs of all resources to be provided by the ESP/CMO
 - a detailed description of the oversight and evaluation methods that the board will use to oversee the ESP/CMO, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP/CMO's progress toward achieving agreed-upon goals
 - a detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory
 - a detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP/CMO and the schedule on which the ESP/CMO will receive compensation
 - a detailed explanation of the financial responsibilities of the ESP/CMO, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP/CMO can make without obtaining board approval, and what reports the ESP/CMO will submit to the board on financial performance and on what schedule
 - a detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP/CMO and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed
 - a detailed description of the grounds for which the ESP/CMO or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause
 - an explanation and justification of any indemnification provisions in the event of default or breach by either party
78. The applicant included a plan for the operation of the school in the case that the management agreement is terminated that includes how this plan would be enforced and carried out
79. The applicant included:
- assurance that the board is independent from the ESP/CMO and self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed ESP/CMO or any affiliated business entities
 - evidence of the board's independence
80. The applicant included a clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP/CMO supervisory responsibilities

81. The applicant included a detailed explanation and compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement
82. The applicant included a detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused by the school

Instructions for using the TEA Model Local Campus Partner Application

Districts may use this model campus application or create their own. Districts that create their own application must have it approved as part of the benefits application process.

- If a district chooses to adopt this model application, they should complete the fields **in red** with information relevant their application process and remove this instruction page. Districts are encouraged to add district branding to the application.
- **If this application is altered beyond the fields marked in red, the locally developed application MUST be submitted to TEA by the following due dates (emailed to TXP@tea.texas.gov) as part of the benefits approval process:**
 - No later than Friday, December 5, 2025 at 5 p.m. Central Time OR
 - No later than 5 working days prior to the release of the district's local campus application (whichever date is sooner).

Last updated May 1, 2024.

TEA will not amend model documents (other than for formatting or typos) between the time that the To the Administrator Addressed letter is released and the current year due date.

Revision history:

Date of Update	Revision Summary
May 1, 2023	<ul style="list-style-type: none">• Updated model instructions (this page)• Clarified ESP/CMO application requirement instruction (p. 4)• Included a question about High Quality Instructional Materials in the Curriculum Design section (p. 17)• Added question about lottery plans in Enrollment Policy description (p. 20)• Added a question about partner staff responsible for financial management (p.28)• Added CMOs to Section 5, including a requirement to name the CMO or ESP if applicable (p.30)• Minor formatting changes/typo corrections
April 7, 2021	<ul style="list-style-type: none">• Included phased-in rule requirement for organizations that apply to operate turnaround campuses in Section 5, question 14 (p. 28)• Corrected TEC references in the drop-down menus on page 3• Updated model instructions (this page)• Minor formatting changes/typo corrections
August 28, 2020	<ul style="list-style-type: none">• Original

Houston Independent School District

Local Campus Partner Application

Introduction

TEC Chapter 12 establishes charter schools to achieve the following purposes:

- Improve student learning
- Increase the choice of learning opportunities within the public-school system
- Create professional opportunities that will attract new teachers to the public-school system
- Establish a new form of accountability for public schools
- Encourage different and innovative learning methods

Charter Application Eligibility

[This section will be tailored to the district's needs that are identified in the Call for Quality Schools.]

The Board shall consider an application for a Campus charter or Program charter if the applicant:

- Meets the eligibility requirements for a Campus charter or Program charter set forth in TEC **Choose an item.**
- Follows the application process established by the District
- Provides evidence to the Board that the applicant will comply with the statutory and District requirements for a campus charter or program charter
- **[District adds additional eligibility requirements from board policy and/or Call document]**

The Board welcomes applications for a Campus charter or Program charter ("Subchapter C charter") pursuant to various paths as set forth in TEC Chapter 39, Subchapter C. The Board specifically invites and encourages applications pursuant to TEC **Choose an item.**

Regardless of authorization path, all groups and entities seeking to create a Subchapter C charter shall follow the Charter Application and Review Process set forth in this document.

Charter Application Process Overview

The application process shall include: *[District will add processes as needed to align with board policy.]*

1. A comprehensive written application submitted by each applicant in accordance with application guidance and requirements provided by the Board
2. A rigorous review of the written application conducted by a review committee ("Review Committee") of at least three members, including at least one district staff member and one external evaluator, with relevant and diverse expertise
3. A formal recommendation from the Review Committee to the Superintendent for approval or denial of each application, based on evidence from the Review Committee's evaluation of the application
4. A formal recommendation from the Superintendent to the Board for approval or denial of each application, based on evidence from the Review Committee's evaluation of the application
5. A formal vote by the Board to approve or deny each application

Standard of Review. The Review Committee shall conduct a rigorous, evidence-based, and merit-focused evaluation of applications, including evaluating the proposed partner's capacity to meet the Board's established academic, financial, operational, and governance standards for charter schools. The Board shall grant a charter only in cases in which the Board determines that the proposed school is likely to:

1. Succeed in meeting academic, financial, operational, and governance standards, thereby meeting both performance and legal compliance expectations for campus charters in the District
2. Serve the best interests of the targeted students and community
3. Fulfill the purposes and intent of Texas's charter school law

4. *[District adds any other non-negotiables here]*

2025- 2026 Request for Applications Timeline

Milestones
Application
Deadline for Complete Proposals — January 20, 2026 All proposals must be submitted in complete and final form by this date. Incomplete proposals, including those that are only partially uploaded, will be disqualified from this cycle.
Independent Evaluation Team Review
Review Committee Proposal Review — January 21 – 23, 2026 The Review Committee will review each proposal.
Required Capacity Interviews — January 26 – 30, 2026 Capacity interviews are conducted at the discretion of the District. They are not open to the public.
Formal Recommendation from Superintendent to Board — February 2, 2026
Board Vote — March 26, 2026

Applicant Types

Applicant types include: Non-profits, Institutes of Higher Education, Existing Charter Operators, and Governmental Entities

In this application cycle, two types of applicants will be considered, each with specific requirements.

Existing Partners – Partners that have operated at least one campus prior to submitting this application

New Partners – Partners that have not previously operated campuses

All applicants must complete Sections 1 – 4 of the application.

Existing Partners and any applicant proposing to contract with an entity that has previously operated schools (including any organizations that operate with an Education Service Provider (ESP) or Charter Management Organization (CMO) must also complete the Existing/Experienced Partner Section (Section 5) and all related attachments.

Instructions

The Board is pleased to invite proposals for new quality partners seeking to open a partnership school in current or subsequent school years. Prior to developing a proposal, please read this entire document

Components of the Proposal

- Narrative Proposal: The proposal is the formal application to the Board and is a comprehensive description of the school's educational, operational, and financial plans
- Attachments: Throughout the proposal, specific documents are requested in addition to narrative answers. Attachments may not contain additional narrative unless specified. A comprehensive list of the attachments is provided in these instructions
- Capacity Interview(s): Applicants may have the opportunity to present their plan and demonstrate the team's capacity to open and maintain a high-quality charter school, as well as to answer specific questions about their proposal

Specifications

- Applicants **must** submit proposals electronically and use this application.
- Only responses placed within the text boxes provided will be considered in evaluation activities. All elements of the proposal must be presented in 11-point font and single-spaced.
- Each major section of the proposal (School Overview, Educational Program, etc.) and each attachment must begin on a separate page. Application responses, including the existing questions and content, for sections 1-4 **must not exceed XX pages**. This does not include attachments.
- If you believe a particular question does not apply to your team or proposal, respond "Not Applicable" **and** state the reason this question is not applicable to your team or proposal.
- All required documents should be uploaded in the file format specified.
- Late or incorrectly formatted submissions will not be accepted.
- When submitting résumés, label each document with the individual's affiliation with the proposed school (e.g., board member, principal, etc.)
- Plagiarism, including the copying of language from any other charter application without proper attribution, is grounds for immediate denial of the proposal. It is not acceptable to copy and paste a discussion or description of an existing curriculum, instructional framework, or educational model (e.g., Montessori, arts integration, project-based learning, blended learning, etc.) from another source. A high-quality applicant team with the capacity to operate a high-quality school must be able to thoughtfully explain in their own words how they intend to educate children. Existing operators proposing to replicate a model may use their own intellectual property, which is appropriate and acceptable.

Attachments

The following is a list of attachments to accompany the proposal. Note that not all attachments will be applicable for all applicants. It is the responsibility of the applicant to ensure they submit all attachments required for their proposal. Do not upload documents for any attachment that is not applicable.

1. Graduation standards (*high school applicants only*)
2. Enrollment policy
3. Discipline policy
4. Organization charts
5. Board documents
6. Board Member Information Form
7. Leadership team qualifications or role description
8. Staff Recruitment and Hiring Plan
9. Staff Development Plan
10. Financial Plan

Applicant Code of Conduct

Members of the Board are obligated to make decisions in the best interests of children, free from personal or political influences. Similarly, charter school applicants have the responsibility of respecting and upholding the integrity of the charter school proposal process.

Specifically, charter school applicants shall not:

- Initiate, or attempt to initiate, any activity with a Trustee
- Initiate, or attempt to initiate, any activity with a member of the Evaluation Team
- Direct any communications, including proposal documents, to a Trustee or to a member of the Evaluation Team

Charter school applicants found to be in violation of these requirements may be deemed ineligible for consideration in future proposal processes.

Public Disclosure

All charter school proposal materials submitted to the Board become public records.

Challenge Early College High School

Request for Applications for Subchapter C Charters

Applicant Information

Name of Applicant Organization	Challenge Early College High School
Primary Contact Person	Jose R Santos
Mailing Address	5601 West Loop South. Houston Texas 77081
Phone Number	713-664-9780
Email	Jsantos1@houstonisd.org

Names, current jobs and employers, and proposed roles of all persons on applicant team (*Add lines as needed*)

Full Name	Current Job Title and Employer	Position with Proposed School
José R. Santos	Principal	Chief School Officer
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

We plan to apply as a(n):

☒ New Operator (have not previously managed campuses):
complete sections 1-4

☐ Existing Partner (have previously managed campuses and/or have an ESP or CMO): complete sections 1-5

Does this organization operate any other campuses in the United States?

☐ Yes

☒ No

If Yes, complete the table below (*Add lines as needed*) and complete section 5

State	Authorizer	School Name	Year Operation Began	Most Recent School Rating
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Does this applicant team have charter school applications under consideration by any other authorizer(s) in the United States?

☐ Yes

☒ No

If Yes, complete the table below (*Add lines as needed*)

State	Authorizer	Proposed School Name	Application Due Date	Decision Date
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Does this applicant team have new schools or campuses scheduled to open in the United States in the next five years?

☐ Yes

☒ No

If Yes, complete the table below (*Add lines as needed*)

Planned School Name	City	State	Opening Date
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Was this application completed by the operating partner and without assistance from the district or a district assigned vendor?

☒ Yes

☐ No

School Information

NOTE: Complete this part for each school / campus included in this proposal.
Duplicate as needed.

Proposed School / Campus Name		Opening Year	Grades: Year 1	Grades: At Capacity
Challenge Early College High School		2026-2027	9-12	9-12
Proposed Location				
School District <i>Identify the school district in which the charter school will be located.</i>		Houston Independent School District		
Address of Identified Facility <i>If applicable.</i>		5601 West Loop South, Houston, Texas 77081		
Projected Student Enrollment Number			485	
Projected Demographic Information	% EcoDis: 78.76%	% SpEd: 3.71%	% EL: 14.61%	
Model / Specialty <i>(Check all that apply)</i>				
☐ Alternative	☐ Career / Technical Ed.	☐ Military	☐ Montessori	
☐ Arts	☒ College Prep	☐ Language Immersion	☐ STEM	
☐ Blended Learning	☐ Other <i>(list)</i> :	☐ Disability <i>(list)</i> :		

Name of Proposed Principal	Jose R. Santos
Current Employment	Houston ISD
Phone Number – Day	713-664-9780
Phone Number – Evening	
Email	Jsantos1@houstonisd.org

Section 1 - School Overview

This section is not rated separately by the evaluators. It provides the evaluators with a reference for each of the other sections of the proposal, which will be assessed, in part, for the quality of alignment with the School Overview. Please reference page limit requirements on page 5 (Specifications).

Executive Summary

(Limit: 4 Pages)

The Executive Summary should provide a concise overview of the proposed plan for the school; the outcomes you expect to achieve; the geographic and population considerations of the school environment; the challenges particular to those considerations; and the applicant team's capacity to successfully open and operate a high-quality school given the above considerations.

1. Mission and Vision. State the mission and vision of the proposed school. The mission is a statement of the fundamental purpose of the school, describing why it exists. The vision statement describes how the school will operate and what success looks like for students. The mission and vision statement provide the foundation for the entire proposal, and taken together, should identify the students and community to be served and illustrate what success for students will look like.

Mission

Challenge Early College High School (CECHS) exists to expand access to higher education and economic mobility by graduating confident, ethically responsible, lifelong learners who are prepared to succeed in college and beyond. Founded as the first Early College High School in Texas, CECHS serves a diverse, high-need student population drawn from across Houston ISD, including students who are economically disadvantaged (78.76%), Emergent Bilingual (14.61%), At Risk (64.12%), and 100% Title I—many of whom are first-generation college aspirants. The fundamental purpose of Challenge is to remove barriers to college access by embedding rigorous, college-aligned instruction and intentional academic supports within a small, relationship-driven public high school environment, ensuring that all students can achieve at high levels regardless of background.

Vision

The vision of Challenge Early College High School is to operate as a world-class early college learning community where historically underserved students thrive in a rigorous, supportive, and college-embedded environment. Located on the Houston City College (HCC) West Loop Campus, CECHS integrates high school and college experiences so that students engage daily in advanced coursework, academic discourse, and authentic college expectations. Success at Challenge is defined by both access and outcomes: students graduate on time with a Texas high school diploma, up to 61 transferable college credit hours, and the academic skills, confidence, and independence required to persist in postsecondary education and competitive career pathways.

This vision is realized through Challenge's core values of Relationships, Relevance, and Rigor, which guide instructional design, student supports, and campus culture. Through multiple college-credit pathways (Dual Credit, AP, UT OnRamps), embedded literacy and critical-thinking instruction, AVID supports, and consistent data-driven practices, CECHS prepares students not only to meet Texas graduation standards, but to excel in higher education and contribute meaningfully to their communities. Together, the mission and vision of Challenge Early College High School provide the foundation for this proposal and reflect a shared commitment to equity, excellence, and measurable student success under the SB 1882 partnership framework.

2. Educational Need and Anticipated Student Population. Describe the anticipated student population, students anticipated educational needs, and non-academic challenges the

school is likely to encounter. Describe the rationale for selecting the location and targeting this student population.

Challenge Early College High School (CECHS) serves a diverse, academically capable, and historically underserved student population drawn from across Houston ISD. The anticipated student population includes approximately 486 students in grades 9–12, of whom 78.76% are economically disadvantaged, 14.61% are Emergent Bilingual, 64.12% are identified as At Risk, and 100% qualify for Title I services. Additionally, the campus serves students receiving special education services (3.70%), students with 504 plans (5.97%), and a significant population of students identified as gifted and talented (29.84%), demonstrating that CECHS serves students with a wide range of learning needs and academic profiles. Many students are first-generation college aspirants who possess strong academic potential but require structured supports, explicit skill development, and sustained guidance to successfully access and persist in advanced coursework.

The primary educational needs of this population include access to rigorous, college-aligned instruction; intentional development of academic behaviors such as organization, time management, and self-advocacy; and embedded literacy and critical-thinking supports across all content areas. Students benefit from accelerated learning opportunities but also require frequent formative assessment, targeted interventions, and structured tutorials to close learning gaps and maintain progress toward college readiness. Non-academic challenges include limited exposure to college systems, financial constraints, competing family responsibilities, language acquisition needs for Emergent Bilingual students, and the social-emotional demands of balancing high school and college expectations simultaneously. CECHS addresses these challenges through a small-school structure, strong adult advocacy, AVID supports, counseling and advising systems, and proactive monitoring of academic, attendance, and social-emotional data to ensure students remain on track for graduation and postsecondary success.

The rationale for selecting the Houston City College (HCC) West Loop Campus as the school's location is directly aligned to the needs of the targeted student population and the school's mission of expanding access to higher education. Co-locating the high school within a college campus removes logistical, psychological, and cultural barriers to college participation by making college an everyday experience rather than a distant aspiration. Students attend dual credit courses taught by HCC faculty, access college tutoring centers and libraries, and learn to navigate college expectations in a supported environment. This setting is particularly impactful for economically disadvantaged students, Emergent Bilingual students, and first-generation college students, as it normalizes college-going, builds confidence, and accelerates readiness through authentic college coursework. Similar to high-performing SB 1882 models, CECHS intentionally targets a high-need population with a proven early college model that combines high-quality instruction, differentiated supports, and strong partnerships to produce measurable gains in academic achievement and college readiness. This strategic alignment of student need, instructional model, and location ensures that Challenge Early College High School is well-positioned to continue delivering strong outcomes for students and the district under the SB 1882 partnership framework.

1. **Education Plan / Academic Model. Provide an overview of the education program of the proposed school, including major instructional methods, assessment strategies, and non-negotiables of the school model. Describe the evidence that demonstrates the school model will be successful in improving academic achievement for the targeted student population.**

Challenge Early College High School (CECHS) implements a proven, college-aligned academic model designed to ensure that all students—particularly those who are economically disadvantaged (78.76%), Emergent Bilingual (14.61%), At Risk (64.12%), and first-generation college aspirants—successfully access, persist in, and complete rigorous coursework while earning both a Texas high school diploma and college credit. The education program is built around multiple advanced pathways, including Dual Credit through Houston City College (HCC), Advanced Placement (AP) coursework through the College Board, and UT OnRamps, with AVID

serving as a foundational support structure. This integrated early college model prioritizes acceleration over remediation, ensuring students engage daily in grade-level and college-level learning with intentional scaffolds and supports.

Instruction at CECHS is delivered through a consistent, campus-wide instructional framework that emphasizes high-quality instruction, purposeful lesson design, and effective use of instructional time. Teachers intentionally select the instructional model that best aligns to the lesson objective and unit goals, including Gradual Release of Responsibility (I Do–We Do–You Do), the 5E Model (Engage, Explore, Explain, Elaborate, Evaluate), and will be exploring other models such as project-based learning. All classes in grades 9–12 operate within a structured instructional framework that is intentionally flexible to meet the purpose of the lesson. Depending on instructional goals, lessons may follow a full 90-minute cycle, a 45-minute focused cycle, or begin with an analysis and review of the previous assessment, using student performance data as an instructional tool. Regardless of the format, teaching and learning remain continuous and purposeful. Each lesson includes a brief spiral review, direct instruction with frequent checks for understanding, guided and independent practice, and a daily Demonstration of Learning (DOL) to assess mastery and inform next instructional steps. Literacy skills are embedded across all content areas through read-and-annotate routines, think-and-write tasks, and structured academic discourse (pair-and-share, turn-and-talk), ensuring students consistently read, write, speak, listen, and think at high levels. Instruction begins at grade level and intentionally increases in rigor using Bloom’s Taxonomy, moving students toward higher-order thinking and conceptual mastery.

Assessment at Challenge Early College High School is continuous, multi-layered, and intentionally designed to inform instruction. Teachers regularly use formative assessment practices—such as Multiple Response Strategies (MRS) during instruction and daily Demonstrations of Learning (DOLs)—to monitor student understanding, identify learning gaps, and make immediate instructional adjustments. Summative measures, including common unit assessments, STAAR/EOC exams, AP benchmarks and exams, UT OnRamps assessments, and Houston City College course performance data, provide a comprehensive picture of student mastery. Assessment results are analyzed consistently during PLCs and data meetings to plan targeted reteach, spiral review, small-group instruction, enrichment, and structured after-school tutorials.

These systems are reinforced by clearly defined academic non-negotiables that ensure instructional coherence and quality across classrooms. The CECHS academic model requires alignment to state and college-level standards, universal participation in advanced coursework, and intentional selection of instructional models aligned to lesson objectives. Instruction embeds literacy and academic discourse throughout the lesson, incorporates frequent checks for understanding, and uses data daily to drive intervention and enrichment. Teachers are expected to plan and internalize instruction in advance, use slide decks to guide pacing and delivery, explicitly teach academic behaviors such as organization, time management, and self-advocacy, and participate in ongoing professional learning through coaching, PLC collaboration, and instructional practice to support continuous improvement.

Evidence demonstrates that this academic model is highly effective in improving academic achievement for CECHS’s targeted student population. In the 2024–25 school year, aggregated STAAR results show 100% Approaches Grade Level, 92% Meets Grade Level, and 47% Masters Grade Level across all grades and subjects, significantly outperforming district and state averages. This success is consistent across English Language Arts, Mathematics, Science, and Social Studies and reflects deep conceptual understanding and sustained academic growth. Students also demonstrate strong college readiness through success in AP coursework, UT OnRamps, and HCC dual credit classes, as well as high SAT/ACT performance and college credit attainment. These outcomes confirm that Challenge Early College High School’s academic model—grounded in high-quality instruction, intentional differentiation, effective use of instructional time, and continuous progress monitoring—successfully closes opportunity gaps and prepares students for college and future career pathways, meeting and exceeding TEA expectations for an SB 1882 Model Local Campus Partner.

2. Leadership and Governance. List the current members of the school’s proposed leadership team and governing board, including their roles with the school and their current professional affiliations.

Add lines to the following table, as needed. Do not list members of the applicant team who will not have an official leadership role with the school going forward, such as consultants.

Full Name	Current Job Title and Employer	Position with Proposed School
<i>José R. Santos</i>	<i>Principal</i>	Chief Schools Officer
Tracy B. Celestine	Assistant Principal	Assistant Principal
Christopher W. Saikin	Assistant Principal	Assistant Principal
Laura O. Del Rio	Magnet Coordinator	Magnet Coordinator
Dr. Anne McClellan, Ph.D.	University of Houston - Executive Director of Innovation	Friends of Challenge Early College HS Board - President
Justin G. Fuentes, M.Ed.	Chief Schools & Operations Officer - Tejano Center	Friends of Challenge Early College HS Board - Treasurer
Dr. Michael Webster, Ph.D.	President, HCC Southwest	Friends of Challenge Early College HS Board - Secretary

Enrollment Summary

(Limit: 2 Pages)

1. Complete the table below, illustrating the growth plan for the school. Indicate the school year (e.g., for Year 1, change 20xx to 2026) for each column.

Note: Remove any rows for grades the school will not serve.

Grade Level	Number of Students					
	Year 1 2026	Year 2 2027	Year 3 2028	Year 4 2029	Year 5 2030	At Capacity 2031
9	145	145	145	145	145	145
10	119	119	119	119	119	119
11	114	114	114	114	114	114
12	108	108	108	108	108	108
TOTAL	486	486	486	486	486	486

2. Briefly describe the rationale for the number of students and grade levels served in Year 1 and the basis for the growth plan as outlined in the table.

Challenge Early College High School (CECHS) will serve 486 students in grades 9–12 beginning in Year 1 (2026) and will maintain a stable enrollment model through Year 5 and at full capacity. This enrollment structure is intentionally designed to preserve the fidelity of the early college model, which depends on small cohort sizes, strong student–adult relationships, and sustained academic and social-emotional supports. Serving all four high school grade levels ensures continuity in instruction, advising, and college readiness preparation, allowing students to progress through a coherent, vertically aligned program from ninth grade through graduation.

The decision not to expand enrollment over time is grounded in both programmatic and operational considerations. CECHS is co-located on the Houston City College (HCC) West Loop Campus, and maintaining consistent enrollment ensures appropriate access to college classrooms, faculty, tutoring services, and campus resources without overextending shared facilities. Stable enrollment also supports effective staffing, scheduling, and delivery of dual credit, AP, and UT OnRamps coursework. Rather than prioritizing growth in student numbers, CECHS focuses on depth of impact, ensuring that all enrolled students successfully complete advanced coursework, earn college credit, and graduate college-ready. This sustainable enrollment plan aligns with TEA expectations for SB 1882 partnerships by balancing facility capacity, academic quality, fiscal responsibility, and long-term student success.

Section 2 – Educational Program

A strong Educational Program is coherent and aligned with the school’s mission and vision, Operations Plan, and Financial Plan.

Curriculum and Instructional Design

1. Provide the following:

a. A curriculum aligned to state standards that includes a scope and sequence for each grade level and/or content area to be used at the school(s):

Standards-Aligned Curriculum, Scope, and Sequence

Challenge Early College High School implements a coherent, vertically aligned curriculum that is fully aligned to the Texas Essential Knowledge and Skills (TEKS) and intentionally designed to prepare all students for college readiness, degree attainment, and postsecondary success. Each core content area—ELA, mathematics, science, and social studies—utilizes a clearly defined scope and sequence that unpacks TEKS by unit, identifies readiness and supporting standards, and aligns instruction, assessment, and pacing across grade levels. Teachers use these instructional calendars to ensure guaranteed and viable curriculum delivery while maintaining high expectations for all learners, regardless of entry point.

CECHS serves a diverse, high-achieving student population where classrooms include students performing across Not Passing, Approaches, Meets, and Masters levels simultaneously. As a result, curriculum design intentionally supports differentiation, acceleration, and intervention within the same instructional setting. Houston ISD-provided curriculum resources serve as a foundational planning template, ensuring TEKS alignment and vertical coherence, while teachers adapt and blend instruction to meet the rigor of Pre-AP, AP, Dual Credit (HCC), and UT OnRamps coursework. Additional HISD instructional resources are evaluated for rigor and alignment and integrated when they strengthen student access to grade-level and college-level expectations.

College-Aligned Programs and Instructional Model

CECHS follows the College Board curriculum framework for Pre-AP and AP courses, which is vertically aligned to TEKS and emphasizes conceptual understanding, disciplinary literacy, and analytical writing, all of which directly support STAAR readiness while extending students to college-level cognitive demand. Dual credit courses offered through Houston City College (HCC) follow approved college syllabi that are crosswalked to TEKS to ensure students meet both state graduation requirements and postsecondary standards. Additionally, UT OnRamps courses provide a hybrid college-credit model that aligns TEKS mastery with university-level assessment, further expanding access to rigorous pathways.

Instruction at CECHS is delivered through a structured 90-minute block model, with flexibility in instructional cycles based on lesson purpose and student need. Each class includes spiral review, explicit instruction, frequent checks for understanding, guided and independent practice, and weekly Demonstration of Learning (DOL). This model is supported by embedded literacy practices, academic discourse, and explicit instruction in college-ready behaviors such as organization, time management, goal setting, and self-advocacy. The AVID program is a core structural support that aligns to TEKS through writing, inquiry, collaboration, and organization (WICOR) strategies, providing students dedicated time to analyze grades, reflect on assessment data, and create individualized action plans for success.

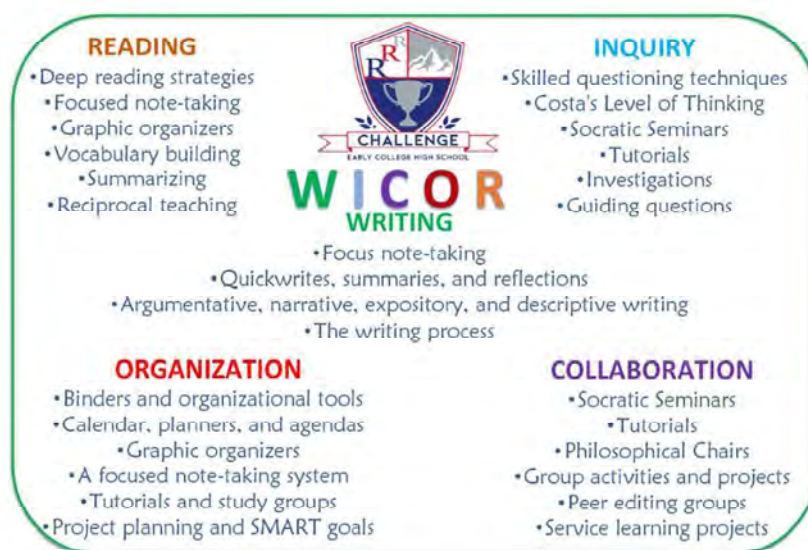
WICOR is AVID’s core instructional framework and stands for Writing, Inquiry, Collaboration, Organization, and Reading. It’s a practical set of classroom strategies that helps teachers plan lessons that build college-ready skills while keeping instruction aligned to standards. In other words, WICOR is the “how” behind AVID - how students learn the content, practice thinking, and develop the habits they need to succeed in rigorous courses like Pre-AP/AP, dual credit, and UT OnRamps.

At the school level, WICOR supports a consistent academic culture because it gives staff a shared language and set of non-negotiable practices across classrooms. For teachers, it strengthens lesson design by embedding structured writing tasks (to process learning), inquiry routines (higher-order questioning and problem-solving), and collaborative structures (accountable talk, peer feedback, tutorials) that increase engagement and provide frequent checks for understanding.

For students, WICOR develops the daily habits that drive success in an early college environment such as strong organization systems (binders, planners, grade checks, and goal-setting), effective reading strategies (annotation, vocabulary routines, and critical reading), and structured academic collaboration (tutorial groups and peer coaching) that strengthen persistence, attendance, and overall performance, especially for first-generation college-going students and students who benefit from additional academic structure.

Resource

- AVID : <https://my.avid.org/default.aspx>



Targeted Supports and Data-Driven Differentiation

Based on ongoing data analysis, including STAAR, classroom formative assessments, TSI indicators, and college readiness benchmarks. CECHS implements strategic double-blocking and intervention structures to meet student needs. Ninth- and tenth-grade students requiring additional literacy support are double-blocked in reading and English courses, while students identified as at-risk, emergent bilingual, special education, or not yet meeting TSI standards receive targeted instructional time and supports. In mathematics, students needing additional support in Pre-AP Algebra I or Algebra II/Math 1314 are double-blocked to ensure sufficient time to master foundational concepts critical for college-level success.

For 11th and 12th grade students, CECHS provides targeted academic supports designed to protect college-course success, graduation progress, and associate degree completion. Teachers commit to at least one designated day each week for tutorials and small-group reteach aligned to current AP, dual credit, and core-course objectives, ensuring students receive timely support before gaps widen. Students also schedule Houston Community College tutoring on Fridays and/or after school as needed especially for dual credit courses so they can access content-specific assistance directly connected to their college syllabi and assessments. Through AVID, all grade levels participate in structured Tutorology time to collaborate with peers, complete assignments, prepare for exams, and strengthen college-ready skills such as organization, note-taking, time management, and self-advocacy. In addition, CECHS organizes campuswide tutorial cycles on Tuesdays and Thursdays each grading period (and more frequently when data indicates), providing in-day supports and targeted intervention for students who are off track in AP, dual credit, or graduation

benchmarks. To strengthen advanced-content supports, the Principal and / or Chief School Officer reviews campus funds and allocates resources for University of Houston tutors with AP-level expertise to provide Friday tutoring, cohort students strategically with tutors, and monitor progress through consistent check-ins and performance tracking to ensure students stay on pace for both the Distinguished diploma and associate degree pathway.

These instructional systems are directly aligned to CECHS’s demonstrated outcomes. The campus earned a 2025 TEA Accountability rating of “A”, with distinctions in Academic Achievement across all tested subjects, Top 25% Comparative Academic Growth, Top 25% Closing the Gaps, and Postsecondary Readiness (based on the 2024-25 TAPR 101912323 report).

High STAAR performance, strong academic growth, and 100% graduation and CCMR outcomes for multiple student groups validate that the CECHS curriculum and instructional model are effective, equitable, and responsive to student needs. Together, these structures ensure that all students, regardless of starting point are supported, challenged, and prepared to graduate with both a high school diploma and meaningful college credit, fully aligned to TEA expectations and district priorities.

Standards-Aligned Curriculum, Scope, and Sequence

Challenge Early College High School implements a coherent, vertically aligned curriculum that is fully aligned to the Texas Essential Knowledge and Skills (TEKS) and intentionally designed to prepare all students for college readiness, degree attainment, and postsecondary success. Each core content area—ELA, mathematics, science, and social studies—utilizes a clearly defined scope and sequence that unpacks TEKS by unit, identifies readiness and supporting standards, and aligns instruction, assessment, and pacing across grade levels. Teachers use these instructional calendars to ensure guaranteed and viable curriculum delivery while maintaining high expectations for all learners, regardless of entry point.

CECHS explicitly leverages (1) HISD TEKS-aligned curriculum resources as the base pacing/vertical alignment anchor, (2) College Board frameworks for Pre-AP/AP (course frameworks and Course & Exam Descriptions), and (3) HCC-approved dual credit syllabi and course sequences, crosswalked to TEKS and graduation requirements. This ensures students experience a guaranteed TEKS pathway while accelerating into college-credit coursework with clear prerequisite sequencing and aligned assessments. Where adjustments are needed (e.g., block-schedule pacing, tutoring/intervention days, or readiness-based double-blocking), CECHS makes campus-level pacing refinements while maintaining TEKS fidelity and ensuring alignment to College Board/HCC course expectations.

Course Progression Scope and Sequence by Grade Level (9th–10th)

CECHS’s grade-level scope and sequence is anchored in a defined early-college course progression that ensures STAAR readiness and on-time acceleration into HCC dual credit (with “general” and “college-ready/accelerated” pathways as appropriate). In Grade 9, students take Pre-AP English I (A/B), Biology (A/B), AP Human Geography (A/B), and math sequencing that places students in Algebra I (A/B) or Geometry based on readiness; students also take AVID (A/B) and may begin early college credit opportunities such as SPCH 1311 and/or other introductory dual credit options based on readiness and program pathway.

In Grade 10, students continue the TEKS-to-college bridge with English II (A/B), Chemistry (A/B), World History (A/B), and Geometry (A/B), while accelerating into dual credit pathway coursework such as SPAN 1411/1412, POFI 2331/1349, and/or EDUC 1300 as part of the associate degree-aligned course sequence. This grade-level scope and sequence ensures students complete core TEKS coursework while building early momentum toward college credit accumulation and the AA degree plan.

9th grade Scope & Sequence

Fall / General	Fall / College Ready	Spring / General	Spring /College Ready
PreAP ENG 1A	PreAP ENG 1A	PreAP ENG 1B	PreAP ENG 1B
ALG 1A or Pre AP Geometry	ALG 1A or Pre AP Geometry	ALG 1B or Pre AP Geometry	ALG 1B or Pre AP Geometry

PreAP BIOLOGY A	PreAP BIOLOGY A	PreAP BIOLOGY A	PreAP BIOLOGY A
AP Human Geography A	AP Human Geography A	AP Human Geography B	AP Human Geography B
PE A or AP Art Drawing A	SPCH 1311	PE B or AP Art Drawing B	KINE 1304
AVID 1A	AVID 1A	AVID 1B	AVID 1B
Strategic Learning Math	PSYC 2301	Strategic Math B	ARTS 1301
EDUC 1300 or Reading 1A	EDUC 1300	SPCH 1311	SOCI 1301/ HUMA 1301

10th grade Scope & Sequence

Fall	Spring
PreAP ENG 2A	PreAP ENG 2B
PreAP Alg 2A	Math 1314
UT OnRamps CHEMISTRY A	UT OnRamps CHEMISTRY A
AP WORLD HISTORY A	AP WORLD HISTORY B
SPAN 1-1411 DCH*	SPAN 2-1412 DCH*
HCC Elective	HCC Elective
HCC Elective	CREATIVE WR B

11th grade Scope & Sequence

Must complete TSIA2 for Math or qualify by other assessment in Math

Fall	Spring
ENG 3A-1301 DCH	ENG 3B-1302 DCH
PreAP Geometry / AP Statistics A /HCC Math Elective	PreAP Geometry / AP Statistics B /HCC Math Elective B
PHYSICS A	PHYSICS B
US HIST A DCH	US HIST B DCH
US GOVT DCH	SPTSS 1 DCH
HEALTH DCH	JOURNL B
AVID 3	AVID 3
HCC Elective /Grad Lab / Online	HCC Elective / Grad Lab /Online class

12th grade Scope & Sequence

Fall	Spring
ENG 4A-2322 DCH	ENG 4B-2323
AP PRE-CAL A / HCC Math Elective	AP PRE-CAL A / HCC Math Elective
SCIRD 1 DCH*	SCIRD 2 DCH*
SCIRD 1 DCH*	SCIRD 2 DCH*
HCC Elective / HS ELECTIVE	ECON DCH
HS ELECTIVE	HCC Elective / HS ELECTIVE
AVID 4	AVID 4
HCC Elective /Grad Lab / Online	HCC Elective /Grad Lab / Online

b. A plan for selecting and implementing High Quality Instructional Materials, including what materials will be used at the campus(es):

Challenge Early College High School (CECHS) implements a coherent, standards-aligned academic program designed to ensure all students meet or exceed Texas Essential Knowledge and Skills (TEKS) while earning meaningful college credit. The curriculum, instructional framework, and professional learning systems are fully aligned to the campus mission and vision, operational plan, and financial investments, and are intentionally designed to meet the needs of a diverse, high-performing student population.

Standards-Aligned Curriculum and Scope & Sequence

CECHS utilizes a vertically aligned, TEKS-based curriculum across grades 9–12 with clearly defined scope and sequence documents for each content area. Instructional calendars unpack readiness and supporting standards, align objectives and assessments, and ensure guaranteed and viable curriculum delivery. Houston ISD curriculum resources serve as the foundational framework to ensure alignment with state standards, while teachers use and refine lesson plans and slide decks to meet the rigor of College Board Pre-AP and AP courses, Houston City College (HCC) dual credit coursework, and UT OnRamps university-aligned instruction. All college-level curricula are crosswalked to TEKS to ensure compliance with state graduation requirements while extending students to advanced academic expectations.

CECHS will continue to leverage HISD’s district-developed TEKS resources as the foundational curriculum “backbone” (scope and sequence, unit planning guidance, and the new HISD planning slide-deck templates) to ensure guaranteed, viable instruction and full TEKS coverage across all core courses. These HISD planning slide decks are provided as a teacher-facing option and are used intentionally as a template not a script so teachers can plan with fidelity to district expectations (TEKS alignment, daily objectives, common assessment windows) while maintaining the flexibility needed for an early college setting. This approach aligns to expectations for managed instruction, including consistent implementation of curriculum, assessment, and professional development systems across campuses.

Building from that HISD TEKS foundation, CECHS teachers are expected to plan backward and “blend” the specialized program curricula that drive our early college model: HCC dual credit (college syllabi, required texts/platforms, and common assessments), College Board Pre-AP/AP (AP Classroom/Pre-AP frameworks and performance tasks), and UT OnRamps (university-aligned course resources and assessments). Teachers crosswalk these course expectations to TEKS and then use the HISD planning slide-deck template to design daily lessons that meet both state standards and college-level rigor tightening alignment through PLC internalization, common demonstrations of learning, and ongoing refinement based on student performance data.

Resources:

- **HISD Curriculum Guide Courses:** <https://canvas.houstonisd.org/courses/671530>
- **Houston City College :** <https://hcca.hccs.edu/programs/areas-of-study/academic-curriculum/>
- **AP Classroom – College Board :** <https://apcentral.collegeboard.org/instructional-resources/ap-classroom>
- **UT OnRamps :** <https://onramps.utexas.edu/course-offerings/>
- **AVID :** <https://my.avid.org/default.aspx>

High-Quality Instructional Materials (HQIM)

CECHS follows a clear process for selecting and implementing High-Quality Instructional Materials based on standards alignment, rigor, accessibility, and demonstrated effectiveness. Core instructional materials include Houston ISD curriculum resources, College Board AP Classroom and Pre-AP materials, HCC-approved college texts and digital platforms, UT OnRamps instructional resources, and the AVID curriculum aligned to WICOR strategies, along with other research-based resources vetted and approved by the campus instructional committee. Materials are implemented with fidelity through required lesson internalization, standards-aligned slide decks, and Demonstrations of Learning (DOLs). Instructional materials are continuously evaluated through PLCs using student performance data to ensure responsiveness to learners performing across Not Passing, Approaches, Meets, and Masters levels.

Instructional Design, Learning Gaps, and Time on Task

Instruction at CECHS is delivered through a structured 90-minute block model that maximizes instructional time while allowing flexibility in lesson cycles. All students receive grade-level instruction first, followed by intentional differentiation using formative assessment data. Learning gaps are identified through daily, intentional formative assessment practices embedded throughout instruction. These include Multiple Response Strategies (MRS) such as Turn and Talk, Think-Pair-Share, and Ink-Pair-Share; whiteboards for quick

problem solving or multiple-choice and True/False responses; response cards; and strategic questioning aligned to Bloom's Taxonomy to assess depth of understanding. Teachers also use quick writes and Think-and-Write prompts aligned to lesson objectives, read-and-annotate tasks with real-time monitoring and feedback, graphic organizers (e.g., Frayer models, flow charts, cause-and-effect maps), peer explanations, and error analysis activities. Additional checks include mid-lesson checks and exit tickets (1–3 questions aligned to the objective), digital formative tools such as Canvas, Pear Deck, AP Classroom, UT OnRamps embedded assessments, and polling platforms (e.g., Kahoot, Google Forms), as well as small-group conferencing during teacher circulation. These formative data sources are complemented by Demonstrations of Learning (DOLs), common unit assessments, STAAR/EOC results, TSI indicators, and college course performance data to ensure timely identification of learning gaps and targeted instructional response. Targeted supports include double-blocking in English and mathematics, small-group reteach, embedded tutorials, after-school interventions, and AVID-supported academic planning. Instruction consistently promotes critical thinking, academic discourse, literacy integration, and higher-order cognitive demand aligned to Bloom's Taxonomy.

Professional Development and Coaching

CECHS sustains instructional quality through weekly PLCs and a coaching model aligned to curriculum implementation and instructional expectations. Teachers participate in pre-service and ongoing professional development focused on curriculum alignment, instructional models, differentiation, data use, and effective implementation of HQIM. Professional learning is directly tied to the Walkthroughs observations, instructional feedback, Action Plan and the teacher evaluation system, ensuring accountability and continuous improvement. PLCs provide dedicated time for collaborative planning, data analysis, and refinement of instruction.

Evidence of Effectiveness and Replicability

The effectiveness of the CECHS academic model is demonstrated by strong performance outcomes. The campus earned a 2025 TEA Accountability rating of "A", with distinctions in Academic Achievement, Top 25% Academic Growth, Closing the Gaps, and Postsecondary Readiness. STAAR results reflect 100% Approaches Grade Level, Meets exceeding 90%, and Masters performance approaching or exceeding 45% overall, significantly outperforming district and state averages. Graduation and CCMR outcomes further validate that CECHS students are prepared for college success. These results confirm that the CECHS curriculum and instructional framework is rigorous, equitable, effective, and replicable for the anticipated student population and aligned to district-identified needs.

Plan for selecting and implementing High Quality Instructional Materials

CECHS has a clear, repeatable plan for selecting and implementing High-Quality Instructional Materials (HQIM) that meets TEA expectations for standards alignment, rigor, and evidence-based implementation. The campus begins with a TEKS-alignment and vertical-coherence review using HISD curriculum resources as the baseline scope-and-sequence anchor, then layers in course-specific HQIM required for advanced and college-credit pathways (College Board Pre-AP/AP materials and AP Classroom resources; HCC-approved dual credit syllabi, texts, and digital platforms; UT OnRamps course resources and assessments; and the AVID curriculum aligned to WICOR). An instructional committee (campus administrators, content leads, and teachers) evaluates materials using common criteria: TEKS/CCR alignment, assessment coherence, accessibility supports for EB/SPED/504 students, usability in a 90-minute block schedule, and proven impact on student learning. Once selected, CECHS implements materials with fidelity through lesson internalization, standards-aligned slide decks and exemplars, common formative checks (including DOLs/exit tickets), PLC calibration, and ongoing coaching cycles tied to walkthrough "look-fors." Effectiveness is monitored through unit assessment results, STAAR/EOC data, TSI/college-readiness indicators, and dual credit/AP performance; when data show gaps, the campus refines pacing, scaffolds, and instructional routines—without lowering rigor—ensuring all students have equitable access to TEKS mastery and college-level expectations.

c. A plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials:

Implementation of Curriculum and Instructional Materials

Challenge Early College High School implements a coherent, yearlong professional development (PD) system designed to ensure effective implementation of standards-aligned curriculum, high-quality instructional materials, and college-level programming (Pre-AP/AP, Dual Credit–HCC, UT OnRamps, and AVID). Professional learning is intentionally structured to reflect CECHS’s reality as a high-performing early college campus serving a diverse student population, where classrooms include students performing at different achievement levels simultaneously. As a result, PD prioritizes intentional planning, differentiation, data-driven instruction, and instructional creativity to ensure access, rigor, and acceleration for all learners.

Annual Professional Development Structure

Using the HISD 2026–2027 calendar, CECHS provides ongoing, embedded professional development through the following structures

1. Pre-Service / Induction (August – Staff PD Days)

Prior to the first day of instruction, all instructional staff participate in foundational PD focused on:

- CECHS mission, vision, core beliefs, and high-performance culture
- Curriculum alignment to TEKS, College Board frameworks, HCC dual credit syllabi, UT OnRamps, and AVID WICOR strategies
- Development of year-at-a-glance plans, scope and sequence, unit plans, and assessments, with backward design from STAAR/EOC and college-credit expectations
- Instructional non-negotiables, lesson internalization, slide deck expectations, Demonstrations of Learning (DOLs), and instructional cycles
- Safety, systems, routines, technology platforms (Canvas, AP Classroom, OnTrack, Google), and student support systems

Teachers assigned to AP, Pre-AP, Dual Credit, UT OnRamps, and AVID are required to complete program-specific summer PD as mandated by the College Board, HCC, UT OnRamps, and AVID to ensure fidelity of implementation and alignment to state standards.

2. Ongoing PD During the School Year (PD Days + Embedded Structures)

Draft of the Yearly Professional Plan included in Appendix A

Throughout the academic year, CECHS utilizes:

- Schoolwide designated PD days (no students) for deep dives into curriculum implementation, data analysis, and instructional calibration
- Weekly PLCs (two per week): one content-focused and one grade-level or instructional practice-focused
- On-the-job coaching and feedback, including spot observations, instructional rounds, demo days, and calibration walks

PD topics during the year include:

- Refining lesson internalization and differentiation strategies
- Using formative assessment data (MRS, DOLs, unit assessments) to address learning gaps
- Acceleration vs. remediation within Tier 1 instruction
- Supporting special populations (Emergent Bilingual, SPED, 504, At-Risk)
- College readiness, TSI alignment, and graduation tracking
- Academic integrity, AI use, and advanced writing expectations

Alignment to Curriculum, Data, and Student Outcomes

Professional development at CECHS is directly tied to curriculum implementation and student performance data. Teachers regularly analyze STAAR/EOC results, Academic Growth, Closing the Gaps, CCMR indicators, and graduation data to adjust instruction and intervention. The effectiveness of this PD model is evidenced by CECHS’s 2025 “A” accountability rating, 100% Approaches, Meets exceeding 90%, Masters near or above 45%,

strong academic growth, and sustained college-credit attainment and graduation outcomes.

Supporting Students at Risk of Not Meeting Exit Standards

To ensure students meet Texas graduation requirements and college-readiness benchmarks, PD explicitly prepares teachers to:

- Implement double-blocking in English and mathematics for students needing additional support (including EB, SPED, At-Risk, and TSI-not-met students)
- Use AVID structures for academic monitoring, goal-setting, and self-advocacy
- Align instruction to exit standards, STAAR/EOC success, and postsecondary readiness

d. A framework for instructional design and strategies that:

- **reflect the needs of the school's target population**
- **ensure all students meet or exceed the expectations of Texas state standards**
- **promote critical-thinking skills**

Challenge Early College High School (CECHS) implements a coherent, equity-driven instructional design framework that responds to the needs of its diverse student population, ensures all students meet or exceed the Texas Essential Knowledge and Skills (TEKS), and intentionally develops critical thinking, college readiness, and meaningful college-credit attainment. CECHS serves a community in which 78.76% of students are economically disadvantaged, 14.61% are Emergent Bilingual, 64.12% are identified as At-Risk, and the campus is 100% Title I. Because students enter with varying levels of academic readiness, CECHS designs instruction and supports around these realities—using standards-aligned planning, frequent progress monitoring, differentiation, and targeted interventions to ensure every student is both supported and challenged on the path to graduating with a Distinguished diploma and an associate degree.

First, Good Instruction for All Students

CECHS's instructional framework is grounded in the principle of “first, good instruction”, ensuring that all students - including Emergent Bilingual students, students receiving special education services, and students identified as gifted—receive grade-level and college-level instruction first, before remediation or intervention is applied. Instruction is aligned to TEKS and extended through Advanced Placement (AP), Houston City College (HCC) dual credit, and UT OnRamps coursework, with the explicit goal of increasing student performance at the Meets and Masters levels and expanding college credit attainment. Teachers are trained to scaffold instruction without reducing rigor using visuals, academic language supports, graphic organizers, structured writing frames, and intentional questioning.

Instructional Models, Differentiation, and Critical Thinking

Instruction is delivered using research-based models such as the Gradual Release of Responsibility (I Do–We Do–You Do) and the 5E Model, selected intentionally based on lesson objectives and student needs. Daily instruction embeds literacy, academic discourse, and frequent checks for understanding to ensure deep engagement with rigorous content. Lessons are designed to promote higher-order thinking aligned to Bloom's Taxonomy, requiring students to analyze, evaluate, justify, and create through problem-solving tasks, text-based analysis, inquiry-based questioning, and written and oral explanations. Demonstrations of Learning (DOLs) and performance tasks are used daily to monitor mastery and adjust instruction in real time.

Serving Special Populations with Fidelity

CECHS demonstrates strong capacity and experience in meeting state and federal obligations for special populations:

Students with disabilities are appropriately identified and served primarily in the least restrictive environment, with access to the general education curriculum, advanced coursework, and accommodations outlined in IEPs

and 504 plans. Students participate in standardized testing in accordance with TEA requirements.

Emergent Bilingual students receive equitable access to the core and advanced academic program through sheltered instruction, language scaffolds, academic vocabulary development, and ongoing progress monitoring. Students are included in assessments, extracurricular activities, and schoolwide culture.

Students identified as Gifted and Talented are supported through access to accelerated coursework, AP, UT OnRamps, and dual credit opportunities, with instructional strategies emphasizing depth, complexity, and independent inquiry.

Data-Driven Supports and College Readiness

Learning gaps are identified through daily formative assessments, PLC data analysis, STAAR/EOC results, TSI indicators, and college course performance. Targeted supports include double-blocked instruction in English and mathematics, small-group instruction, AVID-supported academic coaching, and structured tutorials—while maintaining access to advanced coursework. Instructional time is maximized through 90-minute class periods and intentional intervention cycles.

Preparing Students for Postsecondary Success

CECHS's instructional framework is intentionally designed to prepare students for college readiness and postsecondary success. Students earn college credit through HCC dual credit, UT OnRamps, and AP coursework, with opportunities to earn college credit by scoring 3 or higher on AP exams. The AVID program reinforces organization, inquiry, note-taking, self-advocacy, and metacognition, ensuring students are prepared to succeed in college environments.

e. A plan to identify and serve students with learning gaps:

Challenge Early College High School (CECHS) implements a systematic, data-driven plan to identify and address student learning gaps while maintaining access to rigorous, standards-aligned and college-level instruction. Learning gaps are identified through multiple measures that provide both real-time and data on student performance. These include daily formative assessments such as Multiple Response Strategies (MRS), mid-lesson checks, exit tickets, and Demonstrations of Learning (DOLs) aligned to lesson objectives; common unit assessments; STAAR/EOC results; TSI indicators; AP Classroom and UT OnRamps embedded assessments; and Houston City College dual credit course performance data. Teachers analyze this data continuously to identify gaps in content mastery, academic behaviors, and readiness for advanced coursework.

Once learning gaps are identified, CECHS provides tiered, targeted supports designed to close gaps without reducing instructional rigor. During the instructional day, teachers use small-group instruction, reteach cycles, spiral review, and differentiated tasks aligned to the same TEKS-based objectives as core instruction. Students requiring additional foundational support are strategically double-blocked in English and mathematics, particularly in Grades 9 and 10, to increase instructional time and strengthen literacy and numeracy skills while remaining enrolled in advanced coursework when appropriate. AVID classes further support students by explicitly teaching organization, note-taking, time management, goal setting, and self-advocacy, enabling students to reflect on assessment data and actively monitor their progress.

CECHS also implements schoolwide intervention and monitoring structures to ensure learning gaps are addressed consistently. Teachers meet regularly in Professional Learning Communities (PLCs) to review formative and summative data, adjust instruction, and plan targeted interventions. Students identified as At Risk, Emergent Bilingual, receiving special education services, or requiring 504 accommodations receive supports aligned to their individual plans while being served primarily in the least restrictive environment. Additional supports include structured tutorials, extended learning opportunities, and progress monitoring to evaluate the effectiveness of interventions and make timely adjustments. Through this intentional and responsive system, CECHS ensures that learning gaps are addressed early, instructional time is maximized, and all students are supported in meeting or exceeding Texas state standards and succeeding in advanced and college-level coursework.

f. A plan to maximize instructional time:

Challenge Early College High School (CECHS) maximizes instructional time by ensuring that high-quality Tier 1 instruction is the primary driver of student growth in every classroom. Because CECHS classrooms include students performing at different levels and serve students receiving special education, 504, and Emergent Bilingual services; instructional time is intentionally structured to deliver grade-level and college-level instruction first, supported by embedded scaffolds that increase access without lowering rigor.

All classes operate within 90-minute instructional blocks, allowing teachers to deliver complete instructional cycles without fragmentation. Each lesson follows a consistent structure designed to eliminate downtime and maximize engagement: a brief spiral review, a standards-aligned objective, focused direct instruction, guided practice, independent or collaborative application, and a Demonstration of Learning (DOL) aligned to the objective. This structure ensures instructional minutes are spent on learning rather than transitions or remediation outside the core lesson.

To support advanced coursework (Pre-AP, AP, Dual Credit, and UT OnRamps) while meeting diverse learner needs, CECHS emphasizes embedded differentiation within Tier 1 instruction. Teachers use scaffolded entry points such as visuals, sentence stems, graphic organizers, and exemplars to support students building foundational skills; structured academic discourse (e.g., Think-Pair-Share, table talk, peer explanation) to increase processing time and language development; Multiple Response Strategies to monitor understanding and adjust pacing in real time; intentional questioning aligned to Bloom's Taxonomy; and task variation aligned to the same objective to allow students to engage at increasing levels of complexity.

Instructional time is further maximized by keeping students in the core learning environment whenever possible. Students needing additional support receive targeted scaffolds and small-group instruction during the lesson rather than being removed from instruction. For students requiring extended support, double-blocking in English and mathematics increases instructional minutes while maintaining access to advanced coursework and college-preparatory pathways.

Teachers are expected to be fully prepared prior to instruction, with lesson objectives, DOLs, materials, and technology ready before class begins. Timers, clear routines, and smooth transitions are used consistently to ensure students are actively engaged in reading, writing, problem-solving, or thinking for the majority of each class period. Instruction prioritizes purposeful, standards-aligned tasks aligned to college-level expectations.

To sustain instructional efficiency and rigor, CECHS provides ongoing professional development and coaching focused on eliminating low-impact practices that slow learning or limit engagement. Teachers are trained to avoid practices such as darkened classrooms, full-length films, round-robin reading, excessive worksheet use, unaligned activities, single-response questioning or presentations, homework completion during class, extended homework review, earning "free time," and isolated vocabulary tasks without context. Through coaching cycles, PLC calibration, and lesson internalization, teachers are supported in designing lessons where all students are engaged simultaneously, protecting instructional minutes and advancing learning toward college-ready outcomes.

g. A justification for the proposed educational program based in research, theory, and/or experience, including why it is likely to be effective for the anticipated student population:

Challenge Early College High School's educational program is grounded in the proven Early College framework and strengthened by CECHS's long-standing experience executing it with fidelity for historically underserved students. The model is designed specifically for a student population that includes high percentages of economically disadvantaged, Emergent Bilingual, and at-risk learners by combining rigorous, TEKS-aligned Tier 1 instruction with intentional structures that increase college access and persistence. CECHS operationalizes this through a coherent instructional design that integrates College Board-aligned coursework (Pre-AP/AP via College Board), dual credit through Houston Community College, and university-aligned coursework through

UT OnRamps - all planned backward from the demands of college-credit courses while ensuring TEKS mastery and STAAR/EOC readiness.

This model is likely to be effective because it does more than “offer advanced classes”, it builds the conditions for students to succeed in them. Instruction is anchored in first, strong grade-level teaching, frequent formative checks for understanding, and weekly data cycles that trigger timely reteach, acceleration, and tutoring. AVID functions as a schoolwide readiness engine: WICOR (Writing, Inquiry, Collaboration, Organization, Reading) builds daily college-success behaviors—note-taking, academic discourse, structured collaboration/tutorials, literacy routines, and organization/goal setting—that are especially critical for first-generation college-going students and students who need additional academic structure. As a result, CECHS’s program design directly addresses the district’s identified needs: increasing CCMR outcomes, sustaining high achievement while closing subgroup gaps, and ensuring students graduate with meaningful postsecondary progress (college credit/credentials) without lowering expectations.

In addition to the established Early College approach, CECHS will intentionally explore Project-Based Learning (PBL) as a targeted enhancement. Not a replacement for courses and units where authentic application strengthens mastery (e.g., AP seminar-style performance tasks, college-credit writing/research projects, STEM/CTE pathways). High-quality PBL is aligned to Bloom’s Taxonomy (students analyze, evaluate, and create) and to Costa’s Levels of Thinking embedded in AVID questioning and inquiry routines, creating a coherent “through line” from daily instruction to deeper learning outcomes. This exploration is supported by research showing that PBL can improve performance in advanced coursework; for example, a randomized controlled trial found positive impacts of project-based learning on Advanced Placement exam performance in select AP courses. CECHS can also accelerate implementation quality by learning alongside peer campuses already associated with this work such as Energy Institute High School and using shared lesson studies, walkthrough calibrations, and unit-rubric tuning to replicate what works and avoid implementation pitfalls.

The effectiveness of the CECHS model is evidenced by sustained academic outcomes and external validation. As Texas’s first Early College High School, CECHS has a long-standing record of outperforming district and state averages on STAAR achievement, academic growth, Closing the Gaps indicators, graduation rates, and college readiness measures—while serving a student population that is predominantly economically disadvantaged and includes Emergent Bilingual students, students receiving special education services, and students identified as at risk. This success has been independently validated by Children At Risk, which evaluates over 7,000 Texas public schools using achievement, growth, and college readiness metrics. In the 2024–2025 rankings, CECHS was recognized as #4 among Greater Houston high schools and #1 Gold Ribbon High School in the Houston region, a distinction reserved for schools achieving exceptional outcomes while serving high-need student populations.

Source: Children at Risk: <https://childrenatrisk.org/wp-content/uploads/2025/11/HTX-Rankings-2024-2025-1.pdf>

High School Graduation Requirements (*High Schools Only*)

2. Provide the following:

- a. **As *Attachment 1*, exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do and ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce).**

Attachment 1 included?

☒ YES ☐ NO

- b. **Systems and procedures the school will implement for students at risk of dropping**

out or not meeting exit standards:

Challenge Early College High School (CECHS) implements a proactive, data-driven system of early identification, monitoring, and intervention to ensure students remain on track to meet graduation exit standards and successfully complete the Early College program. Because CECHS maintains a rigorous academic model with universal participation in advanced coursework, the school places strong emphasis on early detection of risk indicators and rapid response in partnership with families.

Early Identification and Monitoring

CECHS begins identifying potential risk factors prior to students' entry into 9th grade by reviewing:

- 8th-grade academic records
- Attendance and tardiness history
- STAAR performance (Not Passing or Approaches)
- Course grades and academic trends

Once enrolled, students are monitored on a three-week cycle using multiple data points, including:

- Attendance and tardiness reports
- Course grades and progress in high school and college coursework
- STAAR/EOC and benchmark assessment results
- Teacher referrals and AVID progress monitoring
- Social-emotional indicators observed by staff

Students exhibiting one or more risk indicators are flagged for immediate review and intervention.

Attendance and Engagement Interventions

Attendance is recognized as a critical predictor of student success. CECHS has dedicated attendance procedures that include:

- Daily monitoring of absences and tardies
- Immediate outreach by attendance support staff through phone calls to students and families to identify barriers and develop solutions
- Collaboration with families to address transportation, health, or family-related challenges
- Documentation of interventions and follow-up to ensure improvement

The goal of these interventions is to keep students engaged, present, and connected to school before attendance patterns escalate into academic failure.

Academic Intervention and Progress Support

Students identified as academically at risk receive tiered academic supports, including:

- Targeted in-class scaffolds and small-group instruction
- After-school and embedded tutorials aligned to course objectives
- AVID academic coaching focused on organization, goal-setting, and progress monitoring
- Data-driven course adjustments such as double-blocking in English or mathematics when appropriate
- Close monitoring of college course performance for students enrolled in dual credit or UT OnRamps

Progress is reviewed regularly, and interventions are adjusted based on student response.

Challenge Early College High School intentionally recognizes and celebrates student growth and persistence through academic and attendance incentives. Students are acknowledged for improved grades, academic progress, perfect or improved attendance, and successful completion of dual credit coursework with a **B or higher**, reinforcing positive behaviors, motivation, and a culture of continuous improvement aligned to college readiness expectations.

Social-Emotional and Wraparound Supports

CECHS recognizes that non-academic factors can significantly impact student performance. Common challenges students may face outside of school include:

- Family instability or changes in household responsibilities
- Financial stress or housing insecurity
- Mental health concerns such as anxiety, depression, or trauma
- Health-related issues
- Caregiving responsibilities or work obligations
- Social pressures or peer-related challenges

To address these needs, CECHS employs a school counselor and a wraparound specialist who work collaboratively with students and families to provide:

- Social-emotional counseling and support
- Referrals to community-based services
- Family engagement and problem-solving support
- Coordination of academic and non-academic interventions to reduce barriers to learning

Family Engagement and Communication

Families are engaged early and often when risk indicators are identified. CECHS:

- Schedules parent conferences as soon as concerns arise
- Clearly communicates academic expectations, progress, and intervention plans
- Partners with families to develop shared strategies for student success
- Maintains ongoing communication to monitor progress and adjust supports as needed

Enrollment Transitions and Student Protection

CECHS acknowledges that the Early College model is highly rigorous and not the right fit for every student. In cases where families determine that the academic demands exceed a student's readiness:

- School staff support families through the transition process
- An assigned office staff member ensures students are immediately enrolled in another appropriate school
- Follow-up procedures are in place to prevent instructional loss or gaps in enrollment

Continuous Review and Accountability

Student risk data is reviewed regularly by campus leadership, counselors, AVID staff, and support personnel to:

- Identify trends and adjust supports
- Ensure interventions are implemented with fidelity
- Monitor progress toward graduation and CCMR requirements
- Take corrective action when students are not responding to interventions

Through early identification, consistent monitoring, strong family partnerships, academic and social-emotional supports, and structured follow-up procedures, Challenge Early College High School ensures that students at risk of dropping out or not meeting exit standards receive timely, coordinated support to remain engaged, persist through graduation, and successfully transition to postsecondary education.

Special Populations and At-Risk Students

3. Provide the following:

- a. An explanation of evidence from which the projection of anticipated special populations was derived:**

The projection of anticipated special populations at Challenge Early College High School (CECHS) is based on consistent historical enrollment trends, Houston ISD campus data, and TEA accountability data (TAPR), which together provide a reliable evidence base. As a school-of-choice campus operating through a district lottery

system, CECHS does not select students based on academic performance, language status, or disability; therefore, its student population reflects the broader HISD community seeking rigorous college-ready pathways. Current data show that CECHS serves a high-need population, with 78.76% economically disadvantaged students, 64.12% identified as At Risk, 14.61% Emergent Bilingual students, 3.70% receiving special education services, 5.97% served under Section 504, and 1.65% identified with dyslexia, along with a significant gifted and talented population. These percentages have remained stable across cohorts and align closely with feeder middle school demographics, making them a sound basis for future projections. CECHS explicitly rejects the “soft bigotry of low expectations” by fully integrating students from special populations into a rigorous, college-aligned instructional model that includes AP, Houston City College dual credit, and UT OnRamps coursework, supported by appropriate accommodations, scaffolds, and evidence-based practices through a Multi-Tiered System of Supports (MTSS). Campus outcomes demonstrate that when Emergent Bilingual students, students with disabilities, and other At-Risk learners receive meaningful inclusion, high expectations, and individualized supports, they are able to access advanced coursework and make strong academic progress, affirming both the accuracy of these projections and CECHS’s demonstrated capacity to serve these populations effectively.

b. An explanation of the organization’s experience in, understanding of, and capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted:

Challenge Early College High School (CECHS), as a Houston ISD campus, has extensive experience, demonstrated understanding, and proven capacity to fulfill all state and federal obligations related to students with disabilities, Emergent Bilingual (EB) students, and students identified as intellectually gifted, in full compliance with IDEA, Section 504, Title VI of the Civil Rights Act, ESSA, and all applicable Texas Education Code (TEC) requirements. CECHS operates within HISD’s established systems for identification, documentation, service delivery, monitoring, and compliance, ensuring that all required legal safeguards, timelines, and reporting requirements are met with fidelity.

For students with disabilities, CECHS implements services in accordance with Individualized Education Programs (IEPs) and Section 504 plans, emphasizing access to the general education curriculum in the least restrictive environment. Special education identification and placement decisions are made through collaborative ARD committees that include families, feeder middle school representatives, and CECHS staff to ensure smooth transitions into the early college model. Because CECHS delivers college-level coursework through AP, Houston City College (HCC) dual credit, and UT OnRamps, the campus maintains clear processes to ensure that students can access the curriculum with appropriate accommodations that are permissible within postsecondary partner guidelines, without modifying academic standards. Staff are trained annually on accommodations, testing participation, progress monitoring, and compliance requirements, and students receiving special education services participate in all required state and national assessments.

CECHS has a strong record of serving Emergent Bilingual students through instructional practices aligned with the Texas English Language Proficiency Standards (ELPS). Teachers are trained in sheltered instruction strategies, academic language development, and data-driven differentiation to ensure EB students have equitable access to advanced coursework. EB students are fully included in AP, dual credit, and UT OnRamps courses and in all schoolwide academic, extracurricular, and culture-building activities. Language proficiency is monitored through TELPAS and classroom-based measures, with data reviewed regularly to inform instruction, provide targeted supports, and determine appropriate exit from EB services in accordance with TEA guidelines.

For students identified as intellectually gifted, CECHS provides advanced academic pathways that extend beyond traditional GT programming. Identification follows HISD and TEA criteria, and services are delivered through accelerated coursework, AP classes, dual credit enrollment, UT OnRamps courses, and enrichment opportunities that emphasize critical thinking, research, and problem-solving. Instructional design intentionally

promotes depth, complexity, and student agency, ensuring GT students are continuously challenged while supported by high-quality instruction and academic coaching through AVID.

Across all special populations, CECHS demonstrates capacity through well-established systems for professional development, data monitoring, and cross-functional collaboration. Teachers and administrators receive ongoing training on compliance requirements, inclusive instructional practices, and progress monitoring. The campus counselor, special education staff, EB specialists, and instructional leaders work collaboratively to ensure that students receive required services while maintaining access to rigorous instruction. This integrated approach - grounded in compliance, high expectations, and demonstrated outcomes - positions Challenge Early College High School to consistently and effectively meet state and federal requirements while supporting the academic success of all learners.

c. A plan for providing services to students with special needs, including how you ensure these students:

- **are appropriately identified**
- **are served in the least-restrictive environment possible**
- **have appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities in ways that support their development**
- **receive required and appropriate support services as outlined in their Individualized Education Plans and 504 plans**
- **participate in standardized testing**

Challenge Early College High School (CECHS) provides a comprehensive, legally compliant, and student-centered plan for serving students with special needs that ensures equity, access, and high expectations within a rigorous early college environment. The school is committed to meeting all state and federal requirements while preparing students for postsecondary success through college-level and advanced coursework.

Identification and Eligibility

Students are appropriately identified for special education and Section 504 services through Houston ISD's Child Find processes, referral systems, and evaluation procedures aligned with IDEA and Section 504. As a school-of-choice campus utilizing a district lottery system, CECHS conducts a required transition ARD for students receiving special education services prior to enrollment. This transition ARD includes feeder middle school professionals, parents/guardians, and CECHS staff to ensure the committee fully understands the academic rigor and expectations of the early college model, including participation in AP, Houston City College (HCC) dual credit, and UT OnRamps coursework. Because CECHS delivers college-level curriculum, instructional content is not modified; rather, the ARD committee determines whether the student can access the curriculum using accommodations that are allowable under College Board, HCC, and UT OnRamps guidelines. If the committee determines the program is appropriate, services are implemented upon enrollment; if not, HISD supports the family in identifying an alternative campus better aligned to the student's instructional needs.

Least Restrictive Environment (LRE)

CECHS serves students in the least restrictive environment by prioritizing access to general education classrooms and advanced coursework. A co-teaching or inclusion support model is not utilized at CECHS due to the college-level structure of instruction and alignment with postsecondary partner requirements. Instead, students receive supports through classroom-based accommodations and instructional scaffolds delivered by the content-area teacher. This model ensures students remain fully integrated into rigorous instruction alongside their peers while receiving individualized support aligned to their IEPs or 504 plans.

Support Facilitation for Students Receiving Special Education Services

Support facilitation at CECHS is a collaborative, ongoing process involving general education teachers, a campus Special Education Specialist, counselors, and administrators. The Special Education Specialist checks in with teachers to review student progress, monitor implementation of accommodations, analyze academic and behavioral data, and problem-solve barriers to success. Teachers are supported in planning lessons that maintain rigor while incorporating scaffolds such as extended time, preferential seating, visual supports, and chunked assignments.

Students receiving services are monitored closely through frequent communication, grade reviews, attendance checks, and formative assessment data. When concerns arise, the Special Education Specialist facilitates timely meetings with teachers, families, and support staff to adjust strategies, ensure fidelity to the IEP, and connect students to additional supports such as tutoring, AVID academic coaching, counseling, or wraparound services. This proactive approach allows CECHS to address needs early while keeping students fully engaged in advanced coursework and the Early College pathway.

Access to Curriculum, Activities, and School Culture

Students with special needs have full access to the general education curriculum and all schoolwide academic programs, extracurricular activities, leadership opportunities, and culture-building experiences. Teachers intentionally design lessons to include scaffolds such as visual supports, academic sentence frames, structured note-taking, chunked instruction, extended processing time, organizational tools, and assistive technology. These supports enable students to engage meaningfully with Pre-AP, AP, dual credit, UT OnRamps, and AVID coursework without reducing rigor. CECHS fosters an inclusive, college-going culture in which students with special needs are active participants in all aspects of campus life.

Implementation of IEPs and 504 Plans

All accommodations and services outlined in students' IEPs and 504 plans are implemented with fidelity. Teachers are trained on accommodation requirements and collaborate with campus administrators, counselors, and special education staff to ensure compliance and effectiveness. Lesson planning and internalization processes require teachers to intentionally plan for accommodations within daily instruction, ensuring students with disabilities have consistent access to rigorous content and early college opportunities. Student progress toward IEP goals is monitored regularly and reviewed through ARD meetings and data cycles.

Participation in Standardized Testing

Students receiving special education or 504 services participate in all required state and national assessments, including STAAR/EOC exams, with approved accommodations in accordance with TEA guidelines. CECHS also collaborates with College Board, HCC Accessibility Services, and UT OnRamps to ensure students receive allowable accommodations for AP exams and college-level assessments without compromising assessment integrity. All testing participation and accommodations are documented and monitored to maintain full compliance.

Through intentional planning, classroom-based accommodations, and high expectations, Challenge Early College High School ensures that students with special needs can successfully access rigorous instruction, earn college credit, and participate fully in the early college experience while remaining compliant with all state and federal requirements.

d. A plan for providing services to emergent bilingual students, including:

- **methods for appropriate identification,**
- **specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the general education curriculum and core academic program for these students,**
- **plans for monitoring and evaluating student progress and success and for exiting them from services,**
- **a plan for including emergent bilingual students in standardized testing and**

schoolwide educational, extra-curricular, and culture-building activities

Challenge Early College High School (CECHS) implements a comprehensive, asset-based plan to identify, serve, monitor, and support Emergent Bilingual (EB) students while maintaining full access to rigorous, college-aligned instruction. CECHS is committed to meeting all state and federal requirements under TEC, TAC, ESSA, and Title III, while ensuring EB students are prepared for postsecondary success through participation in Advanced Placement (AP), Houston City College (HCC) dual credit, UT OnRamps, and AVID coursework.

Identification and Placement

Emergent Bilingual students are appropriately identified through Houston ISD's standardized enrollment and assessment procedures, including the Home Language Survey and English proficiency assessments in accordance with TEA guidelines. Identification data is reviewed by the campus LPAC committee, which determines appropriate EB program placement and instructional supports. Because CECHS operates as a school-of-choice early college campus, LPAC committees include feeder middle school staff when applicable and ensure families understand the academic rigor and language demands of the program.

Instructional Programs, Practices, and Strategies

CECHS employs an English as a Second Language (ESL) instructional model embedded within general education and advanced coursework, ensuring EB students have equitable access to the core academic program without lowering expectations. Instructional strategies include sheltered instruction, explicit academic language development, structured speaking and writing opportunities, visual supports, sentence frames, and vocabulary scaffolds aligned to content objectives. Teachers integrate language objectives alongside TEKS-aligned content objectives in daily lesson planning and internalization.

EB students participate fully in Pre-AP, AP, dual credit, and UT OnRamps coursework with classroom-based accommodations and scaffolds that support comprehension, language production, and academic discourse. The AVID program further strengthens EB student success by reinforcing organization, inquiry, note-taking, collaboration, and self-advocacy skills critical for college-level learning. Double-blocking in English and targeted literacy supports are provided when data indicates a need, particularly for students still developing academic English proficiency.

Progress Monitoring and Exit from Services

EB student progress is monitored through multiple data points, including classroom formative assessments, Demonstrations of Learning (DOLs), STAAR/EOC results, English language proficiency assessments, grades, and college course performance. LPAC committees meet regularly to review student progress, adjust instructional supports, and determine eligibility for exit from EB services in accordance with TEA exit criteria. Families are included in the decision-making process and receive ongoing communication regarding student progress and expectations.

Assessment, Accountability, and Inclusion

Emergent Bilingual students participate in all required standardized assessments, including STAAR/EOC exams, with appropriate linguistic accommodations as needed and permitted by TEA. CECHS ensures EB students are included in AP exams, HCC and UT OnRamps assessments, and college readiness measures, with allowable accommodations coordinated through College Board, HCC Accessibility Services, and UT OnRamps guidelines.

EB students are fully integrated into all schoolwide academic programs, extracurricular activities, leadership opportunities, clubs, tutorials, and culture-building experiences. CECHS promotes an inclusive, college-going culture where bilingualism is viewed as an asset and EB students are encouraged to engage academically, socially, and culturally alongside their peers.

Through intentional identification, embedded instructional supports, rigorous academic access, and continuous progress monitoring, Challenge Early College High School ensures that Emergent Bilingual students develop academic English proficiency, meet or exceed Texas standards, earn college credit, and graduate prepared for success in higher education and beyond.

e. A plan for providing services to students identified as intellectually gifted, including:

- **methods for appropriate identification of students**
- **the specific instructional programs, practices, and strategies the school will employ**

Challenge Early College High School (CECHS) provides a comprehensive plan to identify and serve students identified as intellectually gifted (GT) in accordance with Texas Education Code (TEC), State Board of Education (SBOE) rules, and Houston ISD policies. The school is committed to ensuring that gifted students are appropriately identified and provided with rigorous, differentiated learning experiences that promote depth, complexity, and acceleration within the early college model.

Identification of Gifted Students

Students are identified for gifted and talented services through Houston ISD's district-approved identification process, which includes multiple criteria and measures such as cognitive assessments, academic performance data, STAAR/EOC results, teacher recommendations, parent input, and demonstrated advanced academic behaviors. Identification decisions are made by trained GT selection committees to ensure equitable access and compliance with state requirements. CECHS also reviews transfer GT designations from feeder middle schools and continues services without interruption. Ongoing screening allows students to be identified at multiple points during their high school career.

Instructional Programs, Practices, and Strategies

CECHS serves gifted students primarily through advanced and accelerated coursework embedded within the general education setting. Gifted students participate fully in College Board Pre-AP and AP courses, Houston City College (HCC) dual credit coursework, and UT OnRamps university-aligned courses, which naturally provide the depth, rigor, and complexity required for GT learners. These programs are aligned to the Texas Essential Knowledge and Skills (TEKS) while extending learning beyond grade-level expectations.

Instructional strategies for gifted students emphasize higher-order thinking, inquiry, and independent learning. Teachers design lessons that incorporate open-ended tasks, problem-based learning, research projects, Socratic seminars, advanced text analysis, and performance-based assessments aligned to Bloom's Taxonomy and college-level standards. Differentiation occurs through enrichment, acceleration, and complexity rather than repetition or remediation.

The AVID program further supports gifted learners by strengthening metacognitive skills, goal-setting, academic planning, and self-advocacy—skills essential for success in advanced and college-level coursework. Gifted students are encouraged to pursue early college pathways, earn college credit, and engage in leadership roles, academic competitions, extracurricular activities, and service learning opportunities that extend learning beyond the classroom.

Through intentional identification, access to advanced academic pathways, and instructional practices that promote depth, complexity, and critical thinking, Challenge Early College High School ensures that intellectually gifted students are challenged appropriately, supported consistently, and prepared for success in college and future professional endeavors.

At-Risk Student Population at Challenge ECHS and Safeguards for Equal Inclusion

Who we serve (data-informed "at risk" picture): Challenge Early College HS enrolls 486 students (Grade 9: 144–145; Grade 10: 119; Grade 11: 115; Grade 12: 108). The campus serves a high-need population: 78.76% economically disadvantaged ($\approx$ 383 students), 64.12% identified as At Risk ($\approx$ 312 students), 14.61% Emergent Bilingual (71 students), and 100% Title I. The campus also serves students requiring additional supports: 504: 29 (5.97%), SPED: 18 (3.70%), and Dyslexia: 8 (1.65%). Across grade levels, the EB population is concentrated most in Grade 10 (26.89%), while GT identification increases by Grade 12 (45.37%), reflecting both early identification and continued recognition of student strengths over time. These demographics directly shape how CECHS designs advising, tutoring, intervention, and college-readiness supports. As a result, students—especially those in poverty, EB, SPED/504, dyslexia, and academically vulnerable groups—can persist in rigorous coursework and

meet early college expectations.

Recruitment/marketing plan with safeguards for equal inclusion: CECHS recruits through Houston ISD’s School Choice process with intentional safeguards to ensure equitable access for all interested students and families, including those in poverty, students with disabilities, and students who have struggled academically. The campus conducts proactive outreach to feeder middle schools and community partners, hosts multilingual information sessions/open houses, and provides clear, family-friendly communication about early college expectations, transportation, and student supports (tutorials, AVID structures, counseling, and special program services). Enrollment communications emphasize that CECHS is a public school option open to all eligible applicants and does not use informal barriers (e.g., selective “gatekeeping” practices). CECHS also provides personalized support during recruitment through individual family advising, assistance with application steps, and translation/interpretation as needed. CECHS also coordinates with 504/SPED teams when families request clarification on accommodations so access is not limited by language, disability status, prior academic history, or disability status. In short, CECHS intentionally pairs open access with high-support onboarding, ensuring students who need the most support can still choose—and succeed in—an early college pathway.

Student Recruitment and Enrollment

d. Provide the following:

a. **A student recruitment and marketing plan.**

- **What is the timeline for implementation of this plan?**
- **How will you ensure all interested students and families, including those in poverty, students who have struggled academically, students with disabilities, and other youth at risk of academic failure, are equally included in this plan?**

Challenge Early College High School (CECHS) implements an inclusive, transparent, and equitable student recruitment and enrollment plan aligned with Houston ISD’s School of Choice and Magnet application process. As a district-managed early college campus, CECHS does not screen, select, or exclude students based on academic performance, disability status, language proficiency, or socioeconomic background. All students are admitted through the HISD centralized School of Choice lottery system, ensuring equitable access for all interested families.

Recruitment and Marketing Strategies

CECHS leverages district-supported platforms and community-based outreach to ensure broad awareness and access to information about the early college program:

- **HISD School of Choice / Magnet Hub**

CECHS is listed on the HISD Magnet Hub and School of Choice platforms, which serve as the primary districtwide recruitment and application portals. These platforms provide families with standardized, accessible information about program offerings, eligibility, timelines, and application steps.

- **Middle School Outreach & Information Sessions**

CECHS conducts coordinated outreach to feeder middle schools through presentations, campus visits, and collaboration with counselors and administrators. Information sessions are offered both in person and virtually to accommodate family schedules and transportation needs.

- **Campus Tours & Open Houses**

The school hosts multiple open houses and campus tours throughout the application window to provide

families with firsthand exposure to the early college environment, dual credit opportunities, student supports, and expectations.

- **Multilingual Communication & Family Engagement**

Recruitment materials, presentations, and communications are provided in multiple languages as needed to ensure accessibility for Emergent Bilingual families. CECHS uses HISD-approved communication tools, including ParentSquare, district websites, and printed materials distributed through feeder campuses.

- **Community-Centered Outreach**

CECHS collaborates with community organizations, parent groups, and district events to ensure families from historically underserved communities receive timely and accurate information about the program.

Timeline for Implementation

The recruitment and enrollment plan follows the HISD School of Choice calendar and is implemented annually:

- **Fall (September–October):**

Update Magnet Hub listings, promotional materials, and campus website; begin feeder middle school outreach and counselor coordination.

- **Application Window (November–January):**

Host open houses, campus tours, and information sessions; provide ongoing family support with application navigation and understanding program expectations.

- **Lottery & Placement (February–March):**

HISD conducts the centralized lottery process; CECHS supports families with acceptance notifications and next steps.

- **Spring–Summer (April–August):**

Orientation sessions, academic planning, and transition supports for accepted students and families.

Ensuring Equitable Access for All Students

CECHS ensures equal inclusion of all interested students and families by adhering strictly to district enrollment policies and by intentionally removing barriers to access:

- **No Academic or Programmatic Screening**

Admission is determined solely by the HISD lottery system. CECHS does not require entrance exams, GPA thresholds, or prerequisite coursework.

- **Inclusive of Special Populations**

Students with disabilities, Emergent Bilingual students, economically disadvantaged students, and students who have struggled academically are fully eligible to apply and enroll. Transition ARDs or LPAC meetings occur after lottery placement to ensure appropriate supports—not to limit access.

- **Clear Communication of Program Expectations**

Families receive transparent information about the rigor of the early college model, dual credit expectations, and student supports so they can make informed decisions without exclusionary practices.

- **Support with Transitions**

Magnet Coordinator, Counselors, administrators, and campus staff support families throughout the enrollment and onboarding process, including scheduling, academic planning, and access to student services.

Through a district-aligned recruitment strategy, centralized lottery enrollment, and intentional outreach to underserved communities, Challenge Early College High School ensures that all students—particularly those in

poverty, students with disabilities, Emergent Bilingual students, and youth at risk of academic failure—have equitable access to a high-quality early college education and the opportunity to earn college credit while in high school.

As Challenge Early College High School (CECHS) transitions into an 1882 partnership, the campus intends to continue utilizing the Houston ISD School of Choice lottery process while carefully evaluating its alignment with the Texas College and Career Readiness School Model (CCRSM) and Early College High School (ECHS) Outcomes-Based Measures (OBMs) required to maintain Designated with Distinction status. A key consideration in this transition is ensuring that student access outcomes meet CCRSM equity expectations, particularly the enrollment of underserved populations. Under the ECHS Blueprint, to retain a Distinguished designation, CECHS must meet all required access indicators and at least two access distinction indicators, including limits on underrepresentation relative to the district. Because these measures are directly influenced by enrollment patterns generated through the School of Choice lottery, CECHS will analyze current processes and, if necessary, explore adjustments or other alternative enrollment structures permissible under TEA guidance to ensure compliance with CCRSM access OBMs. This may require exploring an alternative enrollment structure or adjustments to the current HISD School of Choice lottery process in order to ensure compliance with CCRSM access requirements and ECHS Outcomes-Based Measures. Failure to meet these requirements may result in a Designated – Needs Improvement status, which allows up to three school years to improve outcomes while remaining in the CCRSM network with access to technical assistance, professional development, and required submission of an OBM Action Plan and Needs Improvement Program Application Cycle (PAC). During this period, CECHS would be required to implement the ECHS Blueprint with fidelity, continue enrolling underserved students, and ensure students can earn a high school diploma and up to 60 college credit hours or an associate degree. If OBM standards are not met by the end of the school year, the campus would be removed from the CCRSM network, though it would remain responsible for serving all enrolled cohorts through graduation. Accordingly, CECHS views the 1882 transition as an opportunity to proactively align governance and enrollment systems to sustain equity, access, and Distinguished Early College High School status under TEA's CCRSM framework.

- b. As Attachment 2, an Enrollment Policy that complies with state law, includes a description of the lottery process if more students choose to enroll at the campus than can be accommodated, and that ensures the school will be open to all eligible students.**

Attachment 2 included? ☒ YES ☐ NO

School Culture and Discipline

e. Provide the following:

- a. A vision for school culture or ethos that will promote high expectations, a positive and safe academic environment, and shared ownership of intellectual and social development for all students, including students served in special education, emergent bilingual students, and students at risk of academic failure:**

Challenge Early College High School (CECHS) is located on the Houston City College (HCC) West Loop campus, creating a fully integrated early college environment in which students are simultaneously enrolled as Houston ISD high school students and Houston City College students. As such, CECHS students are required to follow the policies, procedures, and codes of conduct of Challenge ECHS, Houston ISD, and HCC. This shared-campus model provides students daily exposure to college expectations while maintaining strong systems for accountability, supervision, and safety.

CECHS operates on a structured trust-based model that promotes student independence while prioritizing

safety and attendance. Students are trusted to transition independently to and from their HCC college classes within the same facility and to return promptly upon class completion or early dismissal by an HCC professor. Safety remains a top priority, and CECHS takes attendance every period, every class, including when students are attending HCC courses. Attendance and movement are closely monitored by CECHS staff to ensure student accountability throughout the instructional day.

To reinforce shared responsibility, CECHS requires a formal Student–Parent Agreement outlining expectations essential for success in a rigorous early college setting. Students commit to enrolling in all Pre-AP, AP, and Dual Credit courses as appropriate, attending both CECHS and HCC classes regularly, completing nightly homework, adhering to all CECHS, HISD, and HCC codes of conduct, demonstrating academic professionalism, and accepting responsibility for their own success. Students acknowledge that violations of HCC or CECHS policies, including removal from college courses, may place continued enrollment at CECHS at risk.

Parents and guardians affirm their partnership by ensuring consistent attendance, providing transportation when needed (including days when HISD is not in session but college classes are held), monitoring academic progress, maintaining regular communication with school staff, and supporting tutorial or intervention requirements. Through this shared-campus structure, clear expectations, and strong family collaboration, CECHS ensures a safe, accountable, and academically rigorous environment that prepares students for college-level independence and long-term success.

b. A plan for establishing the intended culture for students, teachers, administrators, and parents from the first day of school and throughout the school year and proposed mechanisms for monitoring and maintaining campus climate:

Challenge Early College High School’s culture isn’t something we “roll out”—it’s something you can feel the moment you walk in, because it is built deliberately and reinforced daily through instruction, relationships, and shared ownership. The story starts before students arrive. During Pre-Service and Launch Week, staff align around a common definition of what excellence looks like at CECHS: a college-going identity, high expectations with strong support, and a commitment to doing what’s best for kids. Teachers and administrators are normed on campuswide routines and an instructional “look-fors” framework that makes expectations concrete in every classroom - TEKS-aligned objectives, strong lesson structure, frequent checks for understanding, academic discourse, and AVID/WICOR routines that build student habits. These expectations, along with campus procedures, are clearly outlined in the CECHS Faculty Handbook so adults are consistent, students experience predictability, and families know what the school stands for.

When the school year begins, students and families are brought into that same vision through orientation, advisory structures, and AVID systems that teach the “how” of succeeding in an early college environment—attendance, professionalism, academic integrity, and personal responsibility for learning. Parents are treated as true partners from day one through clear communication, conferences, and ongoing opportunities to engage, and CECHS formalizes shared responsibility through a Student–Parent Agreement that sets expectations for coursework, communication, and support. Throughout the year, campus climate is protected by how closely CECHS monitors learning and experience: teachers use daily exit tickets/DOLs and unit assessments to identify who needs reteach or acceleration; PLCs meet weekly to study student work, calibrate rigor, and plan targeted responses; and assistant principals serve as instructional coaches who visit classrooms weekly, provide real-time feedback, and follow up with coaching and modeling. With lesson plans submitted each Monday, leaders can give early-week feedback and use strong examples to sharpen practice across teams. CECHS monitors leading indicators such as attendance patterns, tutorial participation, grade trends, and behavior data. When any indicator slips, the campus responds quickly by increasing supports such as Tuesday/Thursday tutorial cycles, teacher office hours, HCC tutoring, AVID tutorials, and—when funded—University of Houston AP-content tutors. In short, CECHS sustains culture by making expectations visible,

measuring what matters, and adjusting quickly so the daily experience remains safe, rigorous, and welcoming for students, staff, and families.

Challenge Early College High School builds and protects a culture that drives academic success by communicating clear expectations from the very beginning; starting with staff recruitment and continuing through student and family onboarding. During the interview and hiring process, I ensure teachers understand what makes Challenge successful and what the work requires: strong Tier 1 instruction, a relentless commitment to student outcomes, and professional responsibility - beginning with attendance. We set the expectation that, just as we expect students to be present and engaged every day, adults must model the same commitment by showing up consistently for students and for one another. Our culture is grounded in shared core values: (1) all students can learn and reach their potential; (2) effective teaching has the greatest impact on student achievement; (3) student success requires high expectations for students and for ourselves; (4) family engagement and community partnerships are essential; (5) clearly defined outcomes guide our work and accountability; and (6) equity is non-negotiable, and we actively work to reduce inequities that exist in education. Culture is reinforced through PLC collaboration and consistent communication around instructional expectations, student progress, and a shared language - so adults model professionalism, alignment, and collective ownership of results. Weekly PLCs function as the campus “engine” where teams unpack TEKS-aligned objectives, review student work and DOL/exit-ticket trends, calibrate rigor, and plan reteach/enrichment actions for specific students and cohorts.

In addition, instructional leaders provide one-to-one coaching through frequent walkthroughs, on-the-spot feedback, and scheduled coaching conversations that focus on strengthening Tier 1 instruction and the agreed-upon classroom “look-fors.” Communication stays tight and predictable through weekly staff updates, PLC agendas and action steps, lesson-plan feedback cycles, and quick check-ins with teachers and teams—so expectations are clear, support is timely, and progress is monitored continuously rather than waiting for grading cycles.

For parents, culture is strengthened through proactive communication and trust-building structures like Coffee with the Principal, where attendance expectations are explained in real terms—how daily habits shape college readiness—and families are reminded that attendance patterns (good or bad) become the habits our students carry forward. Because the community understands that attendance matters, it is reflected in our daily monitoring systems and the strong attendance outcomes CECHS is known for across HISD.

At Challenge Early College High School, our culture is defined by daily actions—not slogans. Students experience clear expectations through consistent routines that build leadership, accountability, and a college-going mindset, especially through ADVOC, where seniors lead twice-weekly advisory lessons in small multi-grade groups (about five students per grade level) while the teacher facilitates and participates, creating strong peer mentorship and shared responsibility. Our “4Rs” (Relationships, Relevance, Rigor, and Respect) are reinforced through regular assemblies and classroom practices, and when a student’s choices fall outside CECHS expectations, staff respond with timely coaching and restorative support so students learn, reset, and stay connected to the community.

The 4Rs make our culture visible in every classroom and support academic success. **Relationships** are strengthened through a welcoming environment, frequent family engagement opportunities, and advisory structures that ensure every student is known and supported. **Relevance** is embedded in instruction as teachers connect learning to real-world application, college and career pathways, and student goals so students understand the purpose behind the work. **Rigor** is the norm through advanced coursework—Dual Credit, Pre-AP, AP, and UT OnRamps—supported by intentional lesson design, feedback cycles, and tutorials that help students persist and perform at high levels. **Respect** anchors our expectations for learning time, for one another, and for our campus so classrooms remain safe, focused, and academically productive; together, these practices create a cohesive culture where students are supported, instruction stays challenging, and the entire community remains aligned to achievement and college success.

c. A plan to create an inclusive and welcoming environment that will engage families in positive, constructive, and personalized ways:

Challenge Early College High School (CECHS) intentionally creates an inclusive and welcoming environment that engages families as valued partners in their students' academic and personal success. From the first point of contact, families are welcomed through bilingual communication, accessible information sessions, campus tours, and orientation meetings that clearly explain the Early College model, academic expectations, and available supports. CECHS prioritizes culturally responsive practices and ensures that all families—including those of students who are economically disadvantaged, Emergent Bilingual, receiving special education services, or new to the Early College experience have equitable access to information, resources, and opportunities to engage.

Family engagement at CECHS is ongoing, personalized, and relationship-centered. The school maintains consistent two-way communication through multiple platforms such as ParentSquare, email, phone calls, conferences, and family meetings, ensuring families are informed about academic progress, attendance, college coursework, and key milestones. Counselors, AVID teachers, administrators, and support staff work collaboratively to provide individualized outreach when students need academic, social-emotional, or logistical support. CECHS hosts events such as parent orientations, grade-level meetings, college readiness workshops, FAFSA/TASFA support sessions, open houses, and celebrations of student achievement to build trust and shared ownership of student outcomes. Through these intentional systems, CECHS fosters a welcoming school climate where families feel respected, informed, and empowered to actively support their students on the path to graduation, college credit attainment, and postsecondary success.

Challenge Early College High School's family engagement approach is aligned to Family & Community Engagement expectations by creating consistent, relationship-centered touchpoints that make families feel welcomed, informed, and empowered to partner in student success. We begin with high-access entry points such as Open House and grade-level orientation, then sustain connection through ongoing two-way communication (calls/texts, ParentSquare, conferences, and bilingual/translated support as needed) so families can understand expectations, monitor progress, and access support without barriers. Our "Coffee with the Principal" series reinforces this welcoming culture while also building shared understanding of key habits that drive student success—especially attendance—by reviewing routines, celebrating improvements, and addressing concerns early; as a result, our community clearly understands that attendance is a priority and a daily expectation (and our campus consistently performs among the strongest in the district for attendance).

In addition to informational meetings, CECHS intentionally hosts frequent community-building events that engage families in positive and personalized ways and strengthen trust across the year—e.g., Fall Festival, Thanksgiving "share-a-meal" gatherings, winter Gingerbread House events, January family puzzle/game night, and a February Parent Symposium where families meet by grade level and participate in Parent University-style sessions. Some events are academic (college-readiness, course pathways, assessment and tutoring supports), others are informational (policies, schedules, deadlines), and others are relationship-based—because strong relationships increase persistence, communication, and student follow-through. CECHS also leverages community partners like Grow +On to provide wraparound supports and life-skills development that strengthen family engagement and student wellness, ensuring families experience CECHS as an inclusive, supportive early college community—not just a campus that communicates when there is a problem.

d. A system of proactive and responsive student support services (e.g., counseling, mentoring, external service referrals) to meet student needs:

Challenge Early College High School (CECHS) implements a comprehensive, proactive, and responsive system of student support services designed to address academic, social-emotional, behavioral, and external factors that impact student success. Because CECHS serves a diverse population of students—including economically

disadvantaged students, Emergent Bilingual students, students receiving special education and 504 services, and students balancing rigorous college-level coursework—supports are intentionally embedded into the school's daily structures and culture to ensure early identification and timely intervention.

Proactively, CECHS monitors key indicators such as attendance, tardiness, grades, college course performance, STAAR/EOC results, and behavioral data on a regular cycle. Counselors, administrators, AVID teachers, and support staff meet frequently to review data and identify students who may need additional support. Every student is connected to an AVID teacher who serves as an academic mentor and coach, helping students develop organization, time management, self-advocacy, and goal-setting skills. The counseling program provides academic planning, college and career advising, mental health check-ins, and postsecondary guidance, while structured advisory and classroom routines create consistent adult connections across the campus.

Responsively, CECHS provides targeted interventions when students demonstrate academic or non-academic needs. These supports include individual and small-group counseling, academic tutoring during and after school, attendance interventions with family outreach, and referrals to external services through the campus Wraparound Specialist for needs such as housing instability, food insecurity, mental health services, or other family challenges. When concerns arise, families are contacted promptly and included in problem-solving meetings to develop personalized support plans. Through this coordinated system of monitoring, mentoring, counseling, and external partnerships, Challenge Early College High School ensures that students receive the comprehensive supports necessary to remain engaged, persist through challenges, and successfully meet high school and college-level expectations.

- e. As Attachment 3, a student discipline policy that provides for appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture while respecting student rights:**

Attachment 3 included? ☒ YES ☐ NO

- f. Legally sound policies for student discipline, suspension, and expulsion, including how these policies protect students' rights to due process:**

Student Discipline Framework

Challenge Early College High School (CECHS) firmly believes that a safe, inclusive, and respectful school environment is essential for academic success, particularly within a rigorous Early College model where students engage in advanced coursework and college-level expectations. Students cannot reach their full potential unless they feel safe, supported, and valued. As such, CECHS intentionally cultivates a high-performance culture grounded in trust, accountability, mutual respect, and shared responsibility among students, staff, families, and community partners.

Culture-First Approach to Discipline

CECHS operates on the belief that engaging, rigorous instruction and strong relationships significantly reduce disciplinary issues. Our students are purposefully engaged in Pre-AP, AP, dual credit, and UT OnRamps coursework, which promotes ownership of learning and positive behavior. Discipline at CECHS is therefore preventive, instructional, and restorative in nature, not punitive.

High expectations are clearly communicated and reinforced through:

- Explicit teaching of behavioral expectations aligned to college readiness
- Consistent schoolwide routines and procedures
- Ongoing student-adult mentoring relationships

- Strong family partnerships and transparent communication

Students are expected to demonstrate academic professionalism, responsibility, perseverance, respect for others, and integrity—skills that mirror expectations in college and the workplace.

Progressive Discipline Model

While CECHS maintains a highly positive climate and historically low discipline incidents, the campus recognizes that disciplinary issues may arise. CECHS follows a progressive discipline framework aligned to the Houston ISD Student Code of Conduct, Board Policy FOC (DAEP), and Board Policy FOD (Expulsion). This framework emphasizes teachable moments, early intervention, and behavioral growth while ensuring safety and legal compliance.

Key elements of the progressive discipline approach include:

- Early identification of behavioral concerns
- Parent communication and engagement at the first sign of concern
- Counseling, mentoring, and restorative conversations
- Behavioral contracts and goal setting
- Referral to wraparound supports when needed

Disciplinary responses are individualized and consider mitigating factors, including:

- Student age and maturity
- Disciplinary history
- Intent and context of behavior
- Disability-related considerations (IEP/504)
- Emergent bilingual status
- Foster care or homelessness status

Legal Compliance and Due Process

CECHS fully implements HISD and TEA-required due process protections for all disciplinary actions. Students and families are guaranteed:

- Timely notice of alleged misconduct
- Explanation of evidence and disciplinary rationale
- Opportunity for the student to respond
- Parent conferences for DAEP placements
- Formal hearings and appeal rights for expulsions

Students receiving special education services are afforded all protections under IDEA and Section 504, including ARD committee involvement when required.

Suspension and Expulsion as a Last Resort

CECHS explicitly maintains that removal from instruction is not the preferred solution, as students must be in school to succeed academically—particularly in an Early College environment. Suspension, DAEP placement, or expulsion is used only when student behavior poses a serious disruption or safety concern to others, or when required by law.

Even in these cases, CECHS ensures:

- Continued academic access where legally required
- Re-entry supports
- Clear expectations for behavioral improvement

Family and Community Partnership

CECHS views discipline as a shared responsibility. Families are actively engaged as partners in supporting positive behavior and student growth. Communication is accessible, timely, and available in families' preferred languages when needed. The campus also collaborates with district and community resources to address non-academic barriers that may impact student behavior.

Outcome and Accountability

Because of this intentional, relationship-centered approach, disciplinary incidents at CECHS remain minimal, as reflected in TEA accountability data. Students are highly engaged, supported, and held to clear expectations consistent with college and career readiness.

Through a culture-driven, legally sound, and student-centered discipline system, Challenge Early College High School successfully maintains a safe, orderly, and academically focused environment that protects student rights, supports behavioral growth, and advances the school's mission of preparing all students for college success and beyond.

g. Systems and processes for tracking discipline referrals and interventions to identify trends and adapt activities accordingly:

Challenge Early College High School (CECHS) maintains a proactive, data-driven system for tracking discipline referrals and interventions to support a safe, orderly, and inclusive campus climate while maximizing instructional time. Given CECHS's strong academic culture and historically low discipline rates, discipline data is used primarily for early identification, prevention, and continuous improvement rather than punitive response.

CECHS utilizes Houston ISD-approved systems, including PowerSchool and the district discipline referral platform, to document attendance, tardiness, and behavioral incidents in alignment with the HISD Student Code of Conduct and Discipline Matrix. All referrals are entered promptly and coded consistently to ensure accuracy, compliance, and transparency.

Campus leadership reviews discipline and attendance data on a regular cycle, including weekly administrative check-ins, three-week progress monitoring aligned to grading periods, and quarterly campus data reviews. Data is analyzed by grade level, behavior type, time of day, and student subgroup to identify patterns or emerging concerns before behaviors escalate.

Discipline tracking is integrated into CECHS's Multi-Tiered System of Supports (MTSS). Tier 1 supports include clear expectations, high-quality instruction, and strong classroom routines. Tier 2 and Tier 3 interventions may include counseling check-ins, parent conferences, behavior contracts, mentoring, and wraparound services, with all interventions documented and monitored for effectiveness.

Discipline data is also used to inform professional development, supervision plans, and schoolwide routines, ensuring responsive adjustments that strengthen campus culture. All practices are implemented with an equity lens and in compliance with IDEA, Section 504, and emergent bilingual protections, ensuring students' rights and due process are upheld.

Through consistent tracking, analysis, and early intervention, CECHS sustains a positive school climate where students remain engaged in learning and supported toward academic and postsecondary success.

Assessment and Evaluation

f. Provide the following:

a. Annual student performance goals that include targets aligned with the state accountability system:

Challenge Early College High School commits to sustaining A-rated academic performance annually and to meeting or exceeding all Texas Education Agency accountability targets each year, including STAAR achievement, academic growth, Closing the Gaps, graduation rates, and College, Career, and Military Readiness, while continuing to deliver outcomes that place the campus among the highest-performing Early College High Schools in Texas.

b. A plan to implement and interpret interim assessments that measure academic progress – of individual students and student cohorts – throughout the school year:

Challenge Early College High School (CECHS) implements a continuous, classroom-embedded interim assessment system that allows teachers to closely monitor the academic progress of individual students and cohorts throughout the school year. Teachers use a wide range of formative assessments during daily instruction, including Multiple Response Strategies (Think-Pair-Share, Turn and Talk, whiteboards, response cards), strategic questioning aligned to lesson objectives, quick writes, annotation checks, and problem-solving tasks. Every class period concludes with a Demonstration of Learning (DOL) aligned to the day's objective and the TEKS or college-level standard being taught. These daily measures provide real-time feedback to both students and teachers, allowing immediate instructional adjustments and ensuring that learning gaps are identified early. In addition, teachers collaboratively design standards-aligned unit assessments to measure cumulative understanding at the end of each instructional unit, ensuring consistency, rigor, and alignment across content areas.

Interim and formative data are analyzed regularly through structured Professional Learning Community (PLC) meetings and data conferences. Teachers review DOL trends, formative checks, and unit assessment results to evaluate student mastery by standard, identify patterns across classes or grade levels, and plan targeted reteach, spiral review, enrichment, or intervention. Instructional leaders observe classrooms and provide coaching to strengthen the connection between instructional practice and student outcomes, ensuring high-quality Tier 1 instruction remains the primary driver of growth. Students who are not making sufficient progress despite strong instruction receive additional supports such as small-group tutoring, double-blocked courses, AVID academic coaching, or counseling support. Through this ongoing cycle of assessment, analysis, and responsive action, CECHS ensures that interim assessments meaningfully inform instruction, accelerate learning, and support student success in advanced and college-level coursework.

c. A plan and system for collecting and analyzing student academic achievement data, reporting the data to the school community, and using the data to refine and improve instruction (including dedicated time for providing training and support to school leadership and teachers):

Challenge Early College High School (CECHS) implements a comprehensive, systematic plan for collecting, analyzing, and using student academic achievement data to continuously refine instruction and improve outcomes for all students. Data are collected at multiple levels and frequencies, including daily classroom-based formative assessments (Demonstrations of Learning, Multiple Response Strategies, exit tickets), unit and common assessments, interim benchmarks, STAAR/EOC results, college-readiness indicators (TSI, AP exam performance, dual credit course grades), and attendance and course completion data. These data sources provide a holistic view of student performance across TEKS-aligned and college-level expectations and allow staff to monitor progress for individual students, subgroups, and cohorts over time.

CECHS has dedicated, structured time for data analysis and instructional response. Teachers meet in Professional Learning Communities (PLCs) at least twice per week—once by content area and once by grade level—to analyze student work, review assessment results, identify trends, and plan targeted instructional

adjustments, interventions, or enrichment. Campus leaders facilitate data dives following grading cycles, benchmark assessments, and STAAR releases to support vertical and horizontal alignment and ensure instructional coherence. Instructional rounds, coaching cycles, and walkthrough feedback are intentionally aligned to identified data trends so that professional learning directly addresses instructional needs. Ongoing professional development is provided to teachers and leaders on data literacy, assessment design, progress monitoring, and differentiation, ensuring staff are equipped to interpret data accurately and translate findings into effective classroom practice.

Data are communicated transparently to the school community to promote shared ownership of student success. Students regularly review their own performance data through goal-setting conferences, AVID reflections, and academic coaching to build metacognition and responsibility for learning. Families receive consistent updates through progress reports, report cards, ParentSquare communications, conferences, and campus data presentations that explain academic expectations and student progress. At the campus level, leadership uses aggregated data to evaluate program effectiveness, adjust supports, and strengthen instructional systems. Through this intentional cycle of data collection, analysis, communication, and action—supported by dedicated training and collaboration time—CECHS ensures that instructional decisions are evidence-based, equitable, and continuously improving to support student achievement and college readiness.

d. The corrective actions that the school and network (if applicable) will take if either falls short of the goals at any level, including explanation of what would trigger such actions and who would implement them:

Challenge Early College High School (CECHS) implements a tiered, data-driven corrective action framework to ensure continuous improvement and sustained high performance. Corrective actions are triggered by clearly defined indicators such as interim and benchmark assessment trends, PLC data, STAAR/EOC outcomes, college readiness measures (TSI, AP scores, dual credit success), attendance patterns, graduation progress, and subgroup performance gaps. If the campus trends toward a high B rating, campus leadership—led by the Principal and / or Chief School Officer —initiates targeted supports including root-cause analysis, instructional adjustments, increased coaching and observation cycles, focused professional development, refined pacing and scope-and-sequence alignment, and strengthened Tier 1 instruction, with progress monitored weekly through PLCs and instructional rounds. If CECHS were to fall to a C or D rating or demonstrate sustained underperformance, corrective actions escalate to a formal improvement plan with defined benchmarks, intensified leadership coaching, closer monitoring, and comprehensive review of instructional systems and interventions; if leadership performance does not improve after targeted support, reassignment of leadership roles may occur to ensure instructional quality and campus stability. Throughout all corrective actions, CECHS prioritizes protecting instructional time, maintaining continuity for students, and ensuring accountability while remaining focused on student achievement and long-term success.

Section 3 – Governance, Operating Plan, and Capacity

A strong Operations Plan is coherent overall and aligned internally with the school's mission and vision, Educational Program, and Financial Plan.

Organizational Structure

g. **Provide the following:**

a. **As Attachment 4, an organizational chart that indicates all positions and lines of authority.**

Attachment 4 included? ☒ YES ☐ NO

b. **The name(s), title(s), and a description of the daily responsibilities of the person(s) employed by the operating partner that will be responsible for the management of each campus:**

Name	Title	Date Started with Organization	Campus to be Managed	Description of Daily Responsibilities <i>(indicate the person who will be the principal's direct supervisor here)</i>
José R. Santos	Principal / Superintendent (1882 Operating Partner Leader)	August 2001	Challenge Early College High School	Serves as both campus Principal and / or Chief School Officer -level leader for the 1882 partnership. Provides overall vision, strategic leadership, and accountability for academic outcomes, CCRSM/ECHS compliance, finance, operations, and personnel. Oversees instructional quality, college partnerships (HCC, UT OnRamps, College Board), and compliance with TEA/HISD requirements. Supervises assistant principals, counselor, magnet coordinator, and campus leadership team. Reports directly to the Governing Board as the chief executive leader of the program.
Tracy B. Celestine	Assistant Principal	August 2016	Challenge Early College High School	Instructional leader for Grade 9 and campus literacy. Oversees PLCs for ELA and Social Studies, TELPAS instruction and testing, sheltered instruction, AVID Grade 9, attendance administration for Grade 9, TSIA coordination, LPAC

				processes, and dual credit logistics. Manages campus instructional systems (Canvas/OnTrack) and supports after-school and Saturday tutorials. Reports to the Principal and / or Chief Schools Officer.
Preeti Joseph	Assistant Principal	August 2018	Challenge Early College High School	Instructional leader for Grade 10 and electives. Oversees PLCs for electives, AVID Grade 10, GT coordination, CTE oversight, HB 1316 compliance, graduation coaching, attendance administration for Grade 10, TSIA coordination, and student leadership programs (Student Council, NHS). Supports after-school tutorials and campus culture systems. Reports to the Principal and / or Chief School Officer.
Christopher W. Saikin	Assistant Principal	August 2014	Challenge Early College High School	Instructional leader for Grade 11 and science. Oversees PLCs for science, formative assessment systems, campus safety operations, Safe and Supportive Schools Program (SSSP), AP/PSAT/SAT/ACT coordination, UT OnRamps administration, AVID Grade 11, attendance administration for Grades 11–12, TSIA administration, and student clubs. Reports to the Principal and / or Chief School Officer.
Sara G. Boston	Counselor	August 2012	Challenge Early College High School	Provides comprehensive counseling services including academic advising, graduation planning, CCMR tracking, AVID Grade 12 support, special populations coordination (SPED/504), crisis response, SEL supports, and personal graduation plans. Oversees testing accommodations, student records (TReX), and wraparound services in collaboration with campus

				teams. Reports to the Principal.
Laura O. Del Rio	Magnet Coordinator	August 2006	Challenge Early College High School	Leads recruitment, admissions, and enrollment through the HISD School of Choice process. Manages growth planning, outreach, transportation coordination, family engagement, call campaigns, social media, campus events, newsletters, and records. Supports alignment of enrollment practices with CCRSM/ECHS access outcomes. Reports to the Principal and / or Chief School Officer.
TBA	Chair, SPED	On Aug 2026		oversight of Special Education, 504, Emergent Bilingual, and Dyslexia services. Ensures compliance with IDEA, Section 504, and state requirements while supporting inclusive access to rigorous Early College coursework. Coordinates ARD and 504 processes, collaborates with counselors and instructional leaders to monitor student progress, supports teachers with accommodations and scaffolds, communicates regularly with families, and partners with external service providers to strengthen academic and social-emotional supports for students.

- c. The proposed school's legal status (e.g., non-profit and federal tax exempt) and structure that comply with [TEC 12.101\(a\)](#).

Friends of Challenge Early College High School is a 501c3 nonprofit organization with federal tax exempt status.

Governing Board

- h. Provide evidence of the following:

- a. The independence of the board as it relates to the authorizer:

Challenge Early College High School is governed by an independent governing board established as a separate legal entity from the authorizer and structured to meet all Texas Education Agency (TEA) requirements for 1882 partnerships. The board operates independently of the authorizing entity and is not subordinate to, employed by, or controlled by the authorizer. Board members serve without conflicts of interest and exercise full fiduciary, strategic, and oversight authority for the school.

The governing board is responsible for approving policies, overseeing academic performance, ensuring fiscal integrity, monitoring compliance with state and federal requirements, and evaluating the Principal and / or Chief School Officer. While the board collaborates with the authorizer to fulfill statutory obligations, accountability measures, and reporting requirements outlined in the 1882 agreement, it retains independent decision-making authority. This structure ensures objective oversight, protects the integrity of governance, and allows the board to act in the best interest of students, families, and the school community while maintaining a clear separation between governance and authorization.

b. Plans for the board(s) to evaluate the success of the school(s) and school leader(s), including planned frequency of meetings and standing committees:

The governing board for Challenge Early College High School will evaluate school performance and school leadership through a structured, outcomes-driven governance framework aligned to TEA accountability standards, 1882 performance expectations, and the Texas College and Career Readiness School Model (CCRSM). The board will monitor success in multiple, intentional ways to ensure continuous improvement and accountability.

First, the Principal and / or Chief School Officer will develop and maintain an annual School Action Plan that includes clearly defined academic, operational, and organizational goals tied to STAAR achievement and growth, Closing the Gaps indicators, graduation rates, College, Career, and Military Readiness (CCMR), dual credit and associate degree attainment, ECHS Outcomes-Based Measures (OBMs), and fiscal and compliance metrics. The board will receive formal progress briefings at mid-year and end-of-year, with interim updates as needed. Performance metrics from the School Action Plan will be directly tied to the annual evaluation of the Principal and / or Chief School Officer.

Second, at each regularly scheduled board meeting, the Principal and / or Chief School Officer will provide a school performance update that includes student achievement trends, instructional quality indicators, attendance and persistence data, subgroup performance, and progress toward CCRSM and ECHS designation requirements. This ensures that academic outcomes and instructional quality remain the central focus of board oversight at every meeting.

Third, the board will conduct a formal annual evaluation of the Principal and / or Chief School Officer, using board-approved performance criteria aligned to the School Action Plan, student outcomes, fiscal stewardship, compliance, and leadership effectiveness. A mid-year formative review will be conducted to provide feedback, identify support needs, and adjust strategies as necessary.

The board will meet at least quarterly, with additional meetings scheduled as needed. Standing committees including an Academic Performance and Accountability Committee, Finance and Audit Committee, and Governance and Compliance Committee will meet regularly and report to the full board. Through this governance structure, the board ensures sustained oversight, transparency, and a relentless focus on student outcomes while supporting effective leadership under the 1882 partnership model.

i. As Attachment 5, appropriate bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances that will minimize real or perceived conflicts.

Attachment 5 included? ☒ YES ☐ NO

- j. As Attachment 6, a Board Member Information Sheet and resume for each proposed Board Member.**

Attachment 6 included? ☒ YES ☐ NO

- k. A description of how the proposed governing board members' knowledge and skills make them qualified to oversee a successful charter school, including educational, financial, legal, and community experience and expertise:**

Governing Board Capacity and Qualifications

The proposed governing board for Challenge Early College High School is composed of members whose collective knowledge, skills, and professional experience position them to effectively oversee a successful, high-performing public school under the SB 1882 partnership framework. Board members bring deep expertise in education leadership, governance, finance, law, compliance, and community engagement, ensuring comprehensive oversight of academic performance, fiscal stewardship, and organizational integrity.

Educationally, board members include current and former school and district leaders with direct experience in Early College High Schools, Texas College and Career Readiness School Models (CCRSM), and accountability systems. This expertise enables the board to set clear academic expectations, evaluate school leadership, interpret student achievement and college readiness data, and ensure fidelity to TEA requirements, including Outcomes-Based Measures (OBMs). Several members have firsthand experience overseeing advanced academic programs such as dual credit, Advanced Placement, UT OnRamps, and college partnerships, allowing the board to provide informed guidance on sustaining rigor and equitable access.

From a financial and operational standpoint, board members possess backgrounds in nonprofit management, budgeting, audit oversight, and fiscal compliance. This ensures the board can responsibly approve budgets, monitor financial performance, ensure appropriate internal controls, and protect public funds in accordance with TEA, IRS, and state reporting requirements. Board members also have experience in strategic planning and risk management, supporting long-term sustainability and responsible growth.

The board's legal and compliance capacity is strengthened by members familiar with governance best practices, conflict-of-interest standards, public education law, and nonprofit regulatory requirements. This allows the board to adopt and enforce bylaws, ethics policies, and accountability structures that preserve independence from the authorizer while ensuring transparency and due process.

Finally, the board includes members with strong community and family engagement experience, including work with parents, higher education institutions, workforce partners, and community-based organizations. This perspective ensures decisions are grounded in the needs of students and families, supports meaningful partnerships, and reinforces the school's mission of expanding college access and opportunity for historically underserved populations.

Together, the governing board's combined expertise provides the capacity, independence, and judgment necessary to oversee a high-performing Early College High School, hold leadership accountable for results, and ensure Challenge Early College High School continues to deliver strong outcomes for students under the SB 1882 framework.

- l. A plan and timeline for board recruitment (including the desired experience and qualifications of future board members), initial board training, expansion, orientation of new members, and ongoing training for members:**

Friends of Challenge Early College High School (FCECHS) has established a deliberate and phased plan for board recruitment, training, expansion, and ongoing development to ensure strong governance capacity under

the SB 1882 partnership framework. Board recruitment began at the outset of the 1882 exploration process following participation in Texas Education Agency SB 1882 informational sessions, during which governance independence, compliance requirements, and the formation of a 501(c)(3) governing entity were outlined. Initial board members were recruited based on demonstrated alignment to the mission of Challenge Early College High School, commitment to public education, and expertise in education leadership, finance, nonprofit governance, legal compliance, and community engagement.

Board Training and Orientation.

As part of the transition to an 1882 partnership, Houston ISD has committed to supporting campus governing boards through a structured training sequence. This process begins with principal and / or Chief School Officer training in March–April, focused on SB 1882 governance expectations, board–school leader roles, accountability structures, and compliance responsibilities. Following this phase, newly appointed board members will participate in HISD-supported board training sessions. Each board member will receive a Board Member 101 Binder, which includes guidance on the Texas Open Meetings Act, public meeting requirements, quorum restrictions, fiduciary duties, ethics standards, and governance best practices. This ensures board members are prepared to operate legally, transparently, and independently from the authorizer.

Board Composition, Expansion, and Succession.

The FCECHS board is intentionally structured to balance professional expertise and community representation. Desired qualifications for future board members include experience in K–12 or higher education, finance and budgeting, nonprofit or legal governance, workforce development, and community advocacy. Board expansion will occur as needed to address emerging expertise requirements, with vacancies filled through a formal nomination and majority approval process outlined in the bylaws. Staggered terms ensure continuity, stability, and effective succession planning.

The formation of the **Board of Friends of Challenge Early College High School** represents an intentional next step in CECHS's growth and long-term sustainability. As CECHS enters its next chapter of innovation and expanded pathway development, the Board provides a structured way to strengthen community voice, broaden strategic expertise, and ensure the campus has consistent external support aligned to our mission. The Board is composed of individuals with complementary strengths - education leadership, higher education partnerships, workforce/career pathways, finance, governance, community engagement, and student advocacy - who can help CECHS think beyond the day-to-day and remain focused on long-range priorities. This expertise will support CECHS in deepening its early college model, strengthening partnerships (e.g., HCC, UT OnRamps, College Board), and expanding future-ready pathways while protecting the culture and academic systems that make CECHS successful.

To ensure the Board operates with clarity and impact, the Board of Friends will meet quarterly on a consistent schedule, with additional meetings or working sessions added as needed for time-sensitive priorities (e.g., budget planning, partnership agreements, pathway launches, or governance milestones). Meetings will follow a clear agenda and process: (1) review progress on key campus priorities and student outcome indicators; (2) discuss strategic risks, opportunities, and resource needs; (3) provide input and recommendations aligned to the CECHS mission; and (4) document actions, next steps, owners, and timelines for follow-through. CECHS will share a brief pre-read in advance (dashboard highlights, updates, and decision points), and a summary of notes and action items will be distributed after each meeting to ensure accountability and continuity. When appropriate, the Board may establish short-term subcommittees (e.g., finance/budget, partnerships/pathways, family/community engagement, fundraising/advocacy) to move specific initiatives forward between quarterly meetings - ensuring CECHS has both strategic guidance and practical support as we build the next chapter of excellence for students.

Ongoing Development and Accountability.

Board members participate in ongoing governance training at least annually, including TEA SB 1882 updates, Early College High School and CCRSM technical assistance, and financial and academic accountability briefings. Regular board meetings include standing agenda items focused on student achievement, college credit attainment, financial health, compliance, and school culture. This continuous development model ensures the board remains informed, compliant, and effective in overseeing a high-performing Early College High School.

Through this intentional recruitment, HISD-supported onboarding, and continuous training plan, Friends of Challenge Early College High School ensures the governing board maintains the independence, capacity, and expertise required to successfully oversee the campus under the SB 1882 partnership model.

m. Sufficient capacity within and/or an appropriate relationship to any pre-existing non-profit board:

Friends of Challenge Early College High School (FCECHS) has been intentionally established as a standalone 501(c)(3) nonprofit with sufficient governance, operational, and fiduciary capacity to oversee Challenge Early College High School under the SB 1882 partnership framework. While the organization was formed specifically to support CECHS, its structure reflects best practices drawn from experienced nonprofit and public education boards. The governing board includes members with demonstrated expertise in education leadership, nonprofit governance, finance, compliance, and community engagement, ensuring the organization has the internal capacity to meet TEA expectations without reliance on another governing entity.

At this time, FCECHS is not a subsidiary of, nor governed by, any pre-existing nonprofit board. However, the board maintains appropriate collaborative relationships with external nonprofit, higher education, and community partners that support student success, college access, and wraparound services. These relationships are advisory and programmatic in nature and do not diminish the board's independent governance authority. This structure ensures clear lines of accountability, independence from the authorizer, and sufficient organizational capacity to fulfill all governance, oversight, and compliance responsibilities required under the SB 1882 model while allowing strategic partnerships that enhance outcomes for students and families.

Application Team Capacity

n. Provide the following:

a. Describe the collective qualifications of the applicant team to implement the school design successfully, including each team member's experience and evidence of measurable success in:

- **School leadership, administration, and governance**
- **Implementing systems for curriculum, instruction, and assessment**
- **Performance management**

The applicant team for Challenge Early College High School (CECHS) brings deep, demonstrated capacity to successfully implement and sustain the proposed school design through extensive experience in school leadership, instructional systems, and performance management. Collectively, the team has led multiple Early College and high-performing campuses within Houston ISD, with a proven record of improving accountability outcomes, expanding college credit access, and delivering results for historically underserved students. Team members have successfully overseen governance-aligned operations, managed complex partnerships with institutions of higher education, and implemented systems that align curriculum, instruction, assessment, and student supports to Texas accountability and College, Career, and Military Readiness (CCMR) expectations. José R. Santos, Principal and proposed Chief School Officer-level leader under the SB 1882 partnership, anchors the team's capacity. With over 25 years of experience in Houston ISD, Mr. Santos has served as Principal of Challenge Early College High School since August 2022 and previously led Middle College High School at HCC Fraga, both achieving "A" accountability ratings and 100% four-year graduation rates. His leadership demonstrates measurable success in designing and scaling Early College models, dramatically expanding dual credit participation, increasing CCMR attainment, and strengthening Tier 1 instruction through disciplined PLC structures, coaching cycles, and data-driven decision-making. Under his leadership, CECHS has sustained high attendance (98% campus-reported), expanded college pathways including cybersecurity and

artificial intelligence, and ensured students progress toward associate degree completion while meeting state graduation requirements.

Across prior roles as Principal, Assistant Principal, Dean of Students, and Early College instructional leader, Mr. Santos has implemented coherent systems for curriculum alignment, formative and summative assessment, MTSS interventions, master scheduling, and performance monitoring. His experience includes improving STAAR outcomes through targeted interventions, increasing attendance and persistence through family engagement systems, and leading campuses through accountability cycles, including pandemic-era continuity. He is highly fluent in TEA and HISD compliance, accountability frameworks, and performance management expectations, positioning him to function effectively as a school-based CEO under an SB 1882 performance contract.

Together, the applicant team demonstrates the instructional expertise, operational discipline, and results-oriented leadership necessary to implement the CECHS academic model with fidelity, sustain high performance, and meet or exceed the academic, CCMR, and equity outcomes expected under the SB 1882 partnership framework.

b. As Attachment 7, include the résumés and bios for all members of the applicant team.

Attachment 7 included? ☒ YES ☐ NO

c. Describe the proposed School Leader’s experience in and ability to design, launch, and lead a school and implement the specific educational program being proposed, OR describe the board’s plan to recruit and retain a leader with the ability to implement the specific educational program being proposed (*if School Leader candidate(s) is not yet identified*):

Challenge Early College High School has identified a highly qualified School Leader in José R. Santos, whose career demonstrates deep experience in designing, launching, transforming, and sustaining schools aligned to rigorous academic models, Early College frameworks, and Texas accountability expectations. Mr. Santos brings more than 25 years of Houston ISD experience across multiple school models and improvement contexts, with a proven ability to build instructional systems, lead change, and deliver measurable results for diverse student populations.

Mr. Santos’s leadership experience includes direct involvement in school launch and redesign efforts from their earliest stages. Early in his administrative career, he supported the development of East Early College High School during its initiation phase, when the campus operated in temporary facilities. He helped establish foundational instructional systems, staffing structures, and student supports that later transitioned successfully into the permanent campus now serving students. He was later transferred to Twilight School—subsequently redesigned as Advanced Virtual Academy and later On-Time Grad—where he led a significant instructional shift from an online, self-paced graduation-coach model to an in-person instructional program staffed by certified teacher specialists and hourly teachers. In this role, Mr. Santos designed systems to recover dropouts, re-engage disconnected youth, and create structured pathways for students to earn credits and graduate, demonstrating his capacity to design alternative learning models responsive to student need.

Mr. Santos later served as Assistant Principal at Sterling Aviation Early College High School, where he was tasked with strengthening instructional quality using the Texas Effective Schools Framework (ESF). His work focused on reorganizing Tier 1 instruction, strengthening data-driven PLC systems, and improving instructional coherence while also expanding Career and Technical Education pathways aligned to student interests, including welding, business, automotive technology, and aviation. As part of this effort, he helped enhance Sterling’s nationally recognized aviation magnet program, providing students access to pilot licensure and

aviation mechanic certification—experience directly aligned to implementing complex, career-connected academic programs.

In 2019, Mr. Santos was promoted to Principal of Middle College High School at HCC Fraga, a campus in need of significant improvement and ESF-aligned turnaround. Under his leadership, the school transitioned from minimal college participation and low CCMR outcomes to a fully functioning Early College model, dramatically expanding dual credit enrollment, strengthening academic systems, and achieving a 100% graduation rate. By the time of his transition in August 2022, Middle College High School at Fraga earned an “A” accountability rating from TEA, reflecting successful implementation of the Early College educational program.

Since August 2022, Mr. Santos has served as Principal of Challenge Early College High School, sustaining and strengthening one of Texas’s original Early College High Schools. His leadership reflects a deep understanding of the Early College High School Blueprint, CCMR indicators, college partnerships, and Tier 1 instructional excellence. Across every role, Mr. Santos has demonstrated the ability to design and lead complex educational programs, build effective teams, and implement systems that move schools from initiation or improvement status to high-performing outcomes—making him exceptionally well suited to lead the proposed educational program under an SB 1882 performance contract.

d. Describe the work of the school leader(s), including:

- **the measurable performance expectations for the school leader that are aligned to the mission of the school**
- **how these expectations will shift from school launch in the first year of operation to sustainability in future years**

Challenge Early College High School’s Principal and / or Chief School Officer role carries measurable performance expectations that are tightly aligned to CECHS’s mission of expanding college access and success through a rigorous, equitable early college model. Performance expectations include:

- (1) student achievement and growth** (STAAR/EOC Approaches/Meets/Masters, Domain 2 growth, and Closing the Gaps outcomes);
- (2) college readiness and credit attainment** (CCMR, TSI readiness, successful completion of HCC dual credit/UT OnRamps/AP coursework, and progress toward an associate degree and transferable credits);
- (3) graduation, persistence, and on-track indicators** (4-, 5-, and 6-year graduation rates, credit completion, cohort monitoring, and dropout prevention measures);
- (4) equity and access** to advanced coursework and early college opportunities for all student groups (economically disadvantaged, EB, students with disabilities, and at-risk students), consistent with the CCRSM/ECHS model and access OBMs;
- (5) instructional quality** (Tier 1 rigor, TEKS alignment, lesson internalization, walkthrough/coaching cycles, and PLC effectiveness evidenced through student work and assessment results); and
- (6) culture and operational excellence** (attendance/ADA, climate and safety indicators, compliance across HISD/HCC/College Board/UT OnRamps requirements, and meaningful family engagement).

To drive consistency and accountability, the And / or Chief School Officer leads a SMART-goal system that connects the campus action plan to teacher team goals (PLC SMART goals) and student goals (data talks and individualized progress monitoring), ensuring that daily instruction, tutorial supports, and intervention plans are measurable, time-bound, and directly tied to student outcomes and early college benchmarks.

From Year 1 (launch) to sustainability years, expectations shift from establishing and calibrating systems to institutionalizing, scaling, and governing for long-term results under a Level 5 autonomy / SB 1882 School of Innovation framework. In Year 1, the And / or Chief School Officer prioritizes building the “non-negotiables”: a coherent scope and sequence across AP/dual credit/OnRamps pathways; strong instructional routines and

coaching; reliable assessment and data protocols; attendance, advising, and tutorial systems; and clear compliance structures - while ensuring equitable access and protecting the early college culture.

In Years 2–5, expectations expand to continuous improvement and durability: maintaining high accountability outcomes, narrowing subgroup gaps, increasing the percentage of students earning college credit and meeting CCMR without remediation, strengthening staffing pipelines, and codifying systems into a campus playbook that is resilient to turnover. In sustainability years, the role emphasizes strategic performance management and governance-ready decision-making: using trend data and SMART goal progress to guide financial and academic decisions (staffing, scheduling, tutoring investments, and pathway expansion) that maintain Level 5 autonomy, meet performance contract commitments, and support “pay-for-performance” expectations where applicable. This creates a transparent, measurable system in which the CECHS Board can monitor outcomes, allocate resources, and make strategic decisions grounded in data, equity, and student success.

Staffing Plans

o. Provide the following:

a. As Attachment 8, a c for all campus roles, including:

- selection criteria that demonstrate high standards and mission alignment for all candidates
- a hiring protocol, and timeline that ensure the school is fully staffed by July 1 of each year.

Attachment 8 included? ☒ YES ☐ NO

b. As Attachment 9, a plan to develop staff and retain high-performing staff, including:

- an induction program that will prepare teachers to deliver any unique or particularly challenging aspects of the educational program
- evaluation tools and processes that will capture trends and track and promote teacher progress over time
- The process for providing targeted and personalized support for school staff that includes:
- The allocation of resources to support and provide professional development
- The qualifications of personnel to provide professional development and facilitate adult learning
- Professional development methods and calendar

Attachment 9 included? ☒ YES ☐ NO

c. Describe your process for identifying and remedying unsatisfactory leadership and/or teacher performance:

Challenge Early College High School (CECHS) identifies unsatisfactory leadership and/or teacher performance through a consistent, evidence-based cycle that combines multiple data sources: frequent walkthroughs and coaching notes aligned to the campus instructional “look-fors” (standards-aligned objective/DOL, engagement, checks for understanding, rigor, differentiation/scaffolds for SPED/504/EB, and effective use of time), formal observations using the evaluation tool selected by the Board – Friends of Challenge ECHS and aligned to TEA expectations, PLC artifacts (lesson plans/slide decks, unit internalization, common assessment work), student outcome indicators (DOL/formative trends, unit assessments, STAAR/EOC readiness, AP/OnRamps/HCC success), and operational indicators (attendance, duty performance, timeliness, parent communication).

Performance concerns are flagged when patterns emerge (not one-off events), especially when instructional practice is inconsistent with the CECHS model or when student data shows limited growth for specific groups.

When performance is identified as unsatisfactory, CECHS follows a structured remediation pathway with clear roles, timelines, and accountability. The immediate step is a documented improvement plan that includes specific expectations, coaching actions, and measurable targets (e.g., planning/internalization deadlines, required checks for understanding, small-group routines, scaffold implementation, and improved student results). Support is targeted and personalized - modeling, co-planning, “at-bats,” peer observation, and frequent feedback - paired with regular progress monitoring (weekly check-ins and follow-up observations). If improvement is not demonstrated within the defined timeline, escalation occurs: intensified monitoring, reassignment of duties or schedule adjustments, and formal HR-aligned actions consistent with district policy and the 1882 governance framework. For leaders, the same cycle applies - using schoolwide performance metrics, implementation fidelity, staff culture indicators, and compliance measures - followed by leadership coaching and, if required, reassignment or removal to ensure students consistently receive high-quality instruction.

Facilities

p. **Provide the following:**

- a. **Identification of an appropriate proposed school facility OR a plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility that will meet the requirements of the educational program and anticipated student population:**

Challenge Early College High School (CECHS) will continue to operate within the Houston City College (HCC) West Loop campus footprint, where CECHS is physically located and intentionally designed to function as an Early College program. This facility is appropriate for the proposed educational program because it supports daily access to college classrooms, labs, student services, and dual credit instruction while also providing dedicated high school instructional space, student support areas, and campus culture structures. Students are both HISD students and HCC college students for dual credit participation, and the facility design enables safe movement, supervision, and real-time attendance accountability across both high school and college learning spaces.

Plan to Identify, Finance, Renovate, and Ensure Code Compliance

1) Facility Strategy (Core Plan + Contingency)

- Core Plan: Maintain CECHS operations at the HCC West Loop site under an updated/renewed facility-use agreement/MOU that clearly defines space allocation, shared-use areas, supervision expectations, safety protocols, and building access procedures aligned to the Early College model.
- Contingency Plan: If enrollment projections or program growth (e.g., additional dual credit sections, expanded testing capacity, or increased student-support staffing) requires additional space, CECHS will collaborate with HCC and, as needed, HISD Facilities/Operations to (a) reconfigure and optimize current campus space, (b) secure additional rooms within the HCC West Loop facility, and/or (c) identify a nearby, code-compliant satellite location that maintains seamless access to HCC instruction and student services.

2) Financing Approach

Because CECHS occupies an established facility, the plan prioritizes operational sustainability and targeted upgrades rather than new construction.

- Operating Costs: Ongoing facility costs (utilities, custodial, routine maintenance) will be funded through HCC’s approved financial plan, consistent with the performance contract and board-approved allocations.
- Targeted Renovations/Improvements: Any renovations required to support program needs (e.g.,

furniture, technology readiness, signage, secured entry procedures, small-group intervention spaces, counseling/wraparound offices, testing rooms) will be financed through a combination of:

- CECHS campus funds (as approved through the board's budget process),
- allowable district supports/services, and
- partnership-aligned resources and grants when applicable.
- Board Oversight: All facility expenditures and major agreements are reviewed and approved through the CECHS governing board's finance/operations process to ensure transparency and alignment to program priorities.

3) Renovation and Readiness Priorities (If Needed)

Renovations are “right-sized” to protect instructional time and support the Early College model:

- Instructional readiness: classroom instructional technology, secure storage, lab readiness for college-aligned coursework, and reliable connectivity.
- Student supports: dedicated spaces for counseling, wraparound services, college advising, testing, and small-group interventions.
- Safety and operations: secured entry procedures, visitor management alignment, campus signage/wayfinding, and supervision points that support student movement between CECHS and HCC spaces.

4) Code Compliance and Safety Assurance

CECHS will meet all required facility standards through coordinated compliance processes with HCC facility leadership and HISD operations/facilities as applicable:

- Life safety and occupancy: current fire/life safety requirements, occupancy limits, emergency egress, and annual safety checks.
- Accessibility: ADA compliance and appropriate accommodations for students, staff, and visitors.
- Health and environmental: routine inspections and maintenance protocols consistent with district and partner requirements.
- Emergency operations: alignment to the campus emergency operations plan, drills, communication systems, and required safety training for staff and students.
- Documentation: CECHS will maintain and regularly update compliance documentation (inspection records, safety drill logs, incident reporting procedures) as part of operational monitoring.

Timeline (Aligned to 2026–2027 Launch and Ongoing Operations)

January–March 2026

- Confirm facility capacity against enrollment projections and master schedule needs (high school + dual credit sections).
- Begin annual facilities readiness review: classrooms, labs, student support spaces, testing needs, supervision points.

April–May 2026

- Finalize/renew facility-use agreement details with HCC (space allocation, access procedures, safety protocols, shared-use expectations).
- Identify any required upgrades or reconfigurations; develop scope, budget, and procurement plan for board review.

June–July 2026

- Complete targeted upgrades (technology readiness, room setups, signage, secured entry procedures, office/student support spaces).
- Complete compliance checks and documentation updates (occupancy/life safety verification, emergency procedures alignment).

August 2026 (Pre-Service and Launch)

- Staff training on facility operations, safety, supervision procedures, and attendance accountability across CECHS/HCC spaces.
- Final facility walkthrough and readiness sign-off prior to first day of school.

Throughout 2026–2027

- Quarterly facilities monitoring: safety, functionality, cleanliness, supervision effectiveness, and program-fit (dual credit access + student supports).
- Mid-year review to adjust space usage based on enrollment, course demand, and intervention needs.

Why This Facility Meets Program Needs

This facility plan supports CECHS's high-performing Early College model by ensuring students have daily access to rigorous instruction and college coursework, while maintaining the safety, supervision, and student-support systems necessary for a diverse population (including SPED/504/EB services, tutoring/interventions, and wraparound supports). By leveraging an established, college-embedded facility and maintaining a clear compliance and readiness cycle, CECHS can sustain program quality and scale supports without disrupting instructional time.

Section 4 – Financial Plan

A strong Financial Plan is coherent overall and aligned internally with the school's mission and vision, Educational Program, and Organization Plan.

Financial Plan

q. Provide the following:

- a. **The staff members responsible for the organization's finance and a brief description of their qualifications to manage the organization's systems, policies, and processes:**

Staff Responsible for Finance (and Qualifications)

CECHS will also continue to receive district-level fiscal services and oversight from Houston ISD to support budget development and compliance. HISD Finance will provide technical assistance with budget creation and amendments, account coding and position control, purchasing/procurement requirements, payroll reconciliation, and budget-to-actual monitoring through required district systems. As needed, CECHS will participate in scheduled budget review checkpoints with HISD finance staff to verify alignment to allowable funding rules (e.g., Title I and other program funds), strengthen internal controls, and ensure documentation is audit-ready while the campus executes its SB 1882 performance contract and board-approved financial plan. All purchasing timelines and requirements, including vendor selection will be reviewed and, under Level 5 autonomy, evaluated to ensure decisions maximize funds, directly support CECHS goals, meet TEA compliance expectations, and are approved through the CECHS Board's established fiscal oversight process.

- **And / or Chief School Officer(José R. Santos)** – Campus Executive Lead for Budget and Financial Performance: Serves as the primary campus fiscal manager responsible for developing and executing the annual budget aligned to the campus performance contract, staffing plan, and academic priorities. Oversees purchasing approvals, monitors monthly budget-to-actual reports, ensures grant/Title I spending alignment, and provides regular financial reporting to the governing board. Experienced in campus budgeting, master scheduling/staffing allocations, and performance management across early college campuses.
- **Business Manager (TBD) – Day-to-Day Finance Operations and Compliance:** Responsible for daily financial systems and controls, including requisitions/PO processing, invoice reconciliation, procurement documentation, campus activity funds coordination (as applicable), internal controls, audit-ready recordkeeping, and monthly close support. Ensures adherence to TEA purchasing rules, separation of duties, and documentation standards; prepares routine financial dashboards for leadership and board review.
- **HISD Budget & Financial Planning and Controller Support (District-Assigned)** — Budget Development, Compliance, and Financial Controls: HISD will continue to provide centralized finance support to CECHS through the Budget & Financial Planning Office and the Controller's Office to ensure strong fiscal governance, timely execution, and compliance with TEA. Key functions include account coding and financial reporting; general ledger and reconciliation support; accounts payable processing and vendor payment controls; payroll and position control alignment. Collectively, these district-assigned teams provide the systems, internal controls, and technical expertise that help CECHS maximize funds, meet purchasing timelines and requirements, and maintain transparent, compliant financial operations aligned to the SB 1882 Level 5 autonomy framework and board-approved priorities.
- **Board Treasurer (Friends of Challenge Early College High School) – Governance-Level Financial Oversight:** Provides board-level oversight of financial health, including review of budget proposals, monthly/quarterly financial reports, cash flow considerations (if applicable), and internal control practices. Leads the board's finance committee work (or finance agenda items) and ensures transparent reporting and alignment between spending decisions and campus performance goals.
- **Governing Board / Finance Committee (as applicable) – Approval and Monitoring Authority:** Reviews

and approves the annual budget and any material budget amendments; monitors financial performance at regular meetings; ensures controls and policies are in place for ethical stewardship, compliance, and alignment to the SB 1882 performance contract and campus priorities.

b. A description of the organization's systems, policies, and processes for:

- **Financial planning**
- **Accounting**
- **Purchasing**
- **Payroll**

Challenge Early College High School (CECHS) — SB 1882 Level 5 Autonomy (with HISD Systems Support)

CECHS will maintain fiscally sound systems that align with TEA requirements while leveraging HISD-approved software, workflows, and central-office supports for budgeting, accounting, purchasing, and payroll. Under Level 5 autonomy, CECHS can align resources and compensation structures to campus needs; however, all practices remain audit-ready, policy-driven, and compliant with state and federal law, as well as applicable HISD procedures.

Financial Planning

Budget planning is a core part of CECHS's annual school improvement cycle and is used to implement the campus Educational Program, staffing plan, early college priorities, and student supports. Financial planning is a year-round process with participation from the Principal/Superintendent, campus leadership, department leads, and the governing board (Friends of CECHS), with technical support from HISD finance systems and district-assigned budget staff. Once the board adopts the annual budget, CECHS immediately begins continuous budget monitoring and forecasting, using current-year budget control and spending trends as the foundation for the next year's budget. CECHS follows a budget calendar aligned to TEA and has the option of using district timelines (including required approvals, reporting cycles, and public transparency expectations as applicable). Revenue and expenditure planning is developed using HISD budgeting tools and reporting platforms, and budget coding is aligned to TEA requirements and the appropriate fund/function/object/program intent structure. The annual budget is adopted by the required deadline (no later than June 30 each year) and updated through formal budget amendments when needed, with board review/approval for material changes.

Accounting

CECHS accounting practices follow the Texas Financial Accountability System Resource Guide (FASRG) and Generally Accepted Accounting Principles (GAAP) to ensure consistent, transparent, and accurate financial reporting. CECHS uses HISD's financial accounting systems, chart of accounts, and standardized coding structures to record transactions, reconcile accounts, and support state reporting requirements (including required financial classifications and reporting periods). Internal controls include documented procedures for transaction approvals, periodic close processes, reconciliations, and retention of supporting documentation. CECHS financial activity is subject to audit expectations, and the campus maintains audit-ready records for all expenditures, payroll actions, and program costs. Where applicable, CECHS participates in HISD's annual audit processes and compliance reviews, ensuring that financial data is accurate, fairly presented, and aligned to TEA reporting expectations.

Purchasing

CECHS purchasing practices ensure that public funds are expended responsibly, transparently, and in compliance with all applicable procurement rules. The campus will use HISD purchasing systems and

established processes (e.g., vendor selection protocols, requisitions, purchase orders, and payment workflows) while exercising Level 5 autonomy to align purchasing decisions to CECHS priorities and performance outcomes. In addition, CECHS may select vendors beyond the standard HISD vendor list when needed to expand options and ensure best value allowing the campus to compare quality, pricing, and service to make the most cost-effective decisions that support student achievement. Purchasing decisions are governed by internal controls, including separation of duties, pre-approval requirements, documentation standards, conflict-of-interest safeguards, and clear spending thresholds that require campus leadership and/or Friends of Challenge ECHS board review and approval. Major purchases and contracted services are reviewed for instructional impact, student supports, compliance, and cost-effectiveness, and purchasing timelines (including vendor selection) are actively monitored to maximize funds and meet TEA expectations, with final approvals aligned to campus authority limits and board oversight where required.

Payroll

CECHS payroll processes ensure accurate compensation, compliance with reporting deadlines, and proper documentation for time and attendance. Campus administration is responsible for verifying timekeeping, leave reporting, and payroll accuracy for all staff assigned to CECHS. Under Level 5 autonomy, CECHS may continue to use HISD payroll systems and procedures or, if more efficient, adopt an alternative payroll process that reduces processing time while maintaining compliance and internal controls. Any change to payroll systems or procedures will be reviewed and approved by the Friends of Challenge Early College High School governing board. Required records (including absence documentation and sign-in/sign-out or timekeeping records) are maintained in accordance with district and audit requirements and retained for the required period. Under Level 5 autonomy, CECHS may propose stipends and extra-duty pay aligned to expanded responsibilities and performance expectations; such compensation structures are reviewed and approved by the CECHS governing board and executed through approved payroll processes to ensure transparency, equity, and compliance.

c. A description of the organization's internal controls, financial reporting requirements, and process for conducting independent annual financial and administrative audits

Internal Controls

Challenge Early College High School (CECHS) will operate with a layered internal control framework that safeguards public funds, ensures transactions are properly authorized and recorded, and maintains compliance with federal, state, and local requirements. CECHS has the option of utilizing HISD's finance platforms and control environment (e.g., budgeting, purchasing, accounts payable, payroll, and reporting workflows), supported by HISD central finance functions (budget, accounting, purchasing, payroll, and controller/audit support). At the campus level, controls include separation of duties (request/approve/receive/pay), documented approvals aligned to delegated authority limits, purchase order and contract compliance, reconciliation routines, inventory/asset tracking where applicable, conflict-of-interest safeguards, and budgetary controls through line-item monitoring and encumbrance practices. Under Level 5 autonomy, CECHS may implement additional campus/board controls (e.g., pre-approval thresholds, performance-based spending reviews, and vendor selection flexibility), but will maintain controls and documentation standards consistent with GAAP/FASRG expectations and HISD procedures to ensure audit-ready transactions and strong stewardship.

Financial Reporting Requirements

CECHS will meet all applicable TEA and state financial reporting requirements by following an established reporting calendar and using compliant financial systems - leveraging HISD's reporting timelines and platforms when appropriate. Financial performance will be monitored through routine

(at least monthly) budget-to-actual reviews, payroll reconciliations, and position control checks, with variance explanations and corrective actions documented. CECHS leadership will present periodic financial updates to the Friends of Challenge ECHS governing board (and/or its Finance/Audit Committee), including: current year budget status, encumbrances, staffing costs, grant/special revenue status (if applicable), major contracts, and multi-year projections tied to the Educational Program. Any funds raised or donated to Friends of Challenge Early College High School (FCECHS) are private, non-HISD funds and will be maintained in a separate bank account controlled by the FCECHS Board. These funds will be fully segregated from all public school funds and managed under clear internal controls, including documentation of donor restrictions/intent, appropriate approvals, and routine financial reporting to the Board to ensure transparency, compliance, and responsible stewardship.

Independent Annual Financial and Administrative Audits

CECHS will be covered under HISD's independent annual external financial audit process (prepared under GAAP/GASB for governmental entities and subject to applicable federal grant compliance requirements such as Uniform Guidance/Single Audit when relevant). CECHS will cooperate fully with external auditors by maintaining complete documentation, timely reconciliations, and compliant procurement/payroll records. In addition, CECHS will be subject to HISD's risk-based Internal Audit function (administrative/operational/compliance audits), which reviews internal control design and effectiveness, purchasing and payroll compliance, financial stewardship, and operational efficiency; findings are documented, management responses are required, and corrective actions are tracked to completion. If the Friends of Challenge ECHS nonprofit conducts financial activity, it will also complete an independent annual financial review/audit (as required by its bylaws/board policy and funder expectations) conducted by an independent CPA, with results presented to the board and corrective action plans adopted when needed. Across district and nonprofit contexts, audit triggers (e.g., material variances, repeated compliance findings, procurement exceptions, or grant documentation gaps) will result in corrective action plans led by CECHS administration with HISD finance support and governing board oversight until issues are resolved.

d. The roles and responsibilities among the administration and governing board regarding school finance:

Under the SB 1882 Level 5 autonomy framework, campus administration and the governing board (Friends of Challenge Early College High School) share clearly defined and complementary responsibilities for school finance to ensure strong stewardship, transparency, and alignment to the CECHS mission. The And / or Chief School Officer serves as the chief budget owner and financial manager for day-to-day operations: developing the annual campus budget aligned to the academic plan, staffing model, and performance goals; monitoring revenues and expenditures monthly; initiating requisitions and contracts; ensuring payroll accuracy and position control; maintaining documentation and internal controls; and providing regular financial updates and forecasts. Campus leadership also ensures compliance with TEA timelines and reporting requirements (using HISD systems and supports as applicable), identifies risks or variances early, and implements corrective actions to keep the campus on track.

The governing board (Friends of Challenge Early College High School) provides oversight and fiduciary governance: reviewing and approving the annual budget and major amendments; establishing financial policies (purchasing thresholds, approval limits, conflict-of-interest safeguards, and audit requirements); monitoring financial health through routine reports (budget vs. actuals, staffing costs, program expenditures, and compliance indicators); and ensuring decisions maximize student impact and align to the 1882 performance contract. The board - often through a Finance/Audit Committee reviews major purchases and vendor selections that exceed campus authority limits, ensures an independent annual audit is conducted as required, and verifies that any private funds raised by Friends of Challenge ECHS are maintained in separate accounts and reported transparently. Together, administration executes the financial plan with fidelity, while the board

(Friends of Challenge ECHS) ensures accountability, compliance, and long-term sustainability.

e. How the organization ensures financial transparency, including:

- **plans for public adoption of the school's budget**
- **public dissemination of its annual audit and an annual report**

CECHS will ensure financial transparency through public budgeting and reporting practices that meet TEA requirements and align with the Friends of Challenge Early College High School (FCECHS) governance framework, using HISD guidelines, timelines, and standard finance procedures as the initial operating guide to ensure consistency and compliance. Each year, the And / or Chief School Officer will develop a proposed campus budget aligned to the academic plan and SB 1882 performance contract. Prior to adoption, the governing board will post notice and agenda in accordance with the Texas Open Meetings Act and hold a public hearing to review the proposed budget, invite stakeholder input, and formally adopt the budget no later than June 30, with actions documented in official minutes. The adopted budget (and major amendments) will be made publicly available through CECHS/FCECHS and/or HISD-approved channels.

In addition, CECHS will publicly disseminate its annual independent audit and an annual report to provide clear visibility into fiscal stewardship and outcomes. Following the close of each fiscal year, an independent audit will be completed in accordance with applicable governmental auditing standards and TEA reporting expectations (leveraging HISD audit systems and timelines, as applicable). Once accepted by the board in an open meeting, the audit report will be posted publicly. CECHS will also publish an annual report summarizing budget-to-actual highlights, major investments, audit results (including any required corrective actions), and key performance outcomes (e.g., accountability, graduation, CCMR, and early college results), and share it with families and the community through the school website and established communication channels.

e. As Attachment 10, an operating budget and narrative that explains revenue and cost assumptions, including:

- **grant/fundraising assumptions**
- **the amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable)**
- **the projected cost to implement the academic model described in this application**

Attachment 10 included? ☒ YES ☐ NO

f. Describe the organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated:

If anticipated revenues are not received or are lower than estimated, Challenge Early College High School (CECHS) will implement a board-governed contingency plan to protect core instruction, student supports, and compliance obligations while stabilizing the budget. The And / or Chief School Officer and campus finance leads will monitor revenue and expenditures monthly (and more frequently during high-variance periods), using HISD financial systems and reporting timelines as the initial operating guide, and will promptly flag material variances (e.g., enrollment/ADA shifts, grant delays, or funding adjustments). When a shortfall is identified, the And / or Chief School Officer will present a recommended mitigation plan to the Friends of Challenge ECHS governing board for review and approval, including revised forecasts, budget-to-actual trends, and specific reduction options aligned to program impact.

Corrective actions will follow a "protect Tier 1 first" prioritization sequence: (1) immediately restrict or pause

non-essential spending (travel, discretionary supplies, non-instructional contracts), (2) delay or re-phase non-urgent purchases and capital/improvement projects, (3) renegotiate vendor contracts and adjust service levels where feasible, (4) use targeted efficiencies in operations and scheduling while preserving required services (special populations compliance, testing, safety, and early college programming), and (5) if needed, adjust staffing through attrition, vacancy management, and reassignment before considering reductions that would affect core classroom instruction. The board will also review allowable use of reserves/contingency set-asides (if maintained), potential reallocation across budget categories, and eligible supplemental funding sources (e.g., grants, philanthropy managed separately by FCECHS, or allowable program revenues) while ensuring public funds and private funds remain clearly segregated and compliant with all requirements. This structured, board-approved approach ensures CECHS can respond quickly to revenue volatility, maintain financial integrity, and sustain essential services for students and families.

Section 5 – Existing Partner/Experienced Partner Supplement

A strong proposal from a partner that has previously operated schools (including partners that operate under a Charter Management Organization or CMO), or a partner proposing to contract with an entity that has previously operated schools (often referred to as an Education Service Provider or ESP), is coherent overall and aligned internally with the school’s mission and vision, Educational Program, Operational Plan, Financial Plan, and any other applicable attachments.

- ***Existing Partners (any organization that has previously operated schools) should complete only Question 13***
- ***Any applicant proposing to contract with an Education Service Provider (ESP) or CMO (Charter Management Organization) should complete Questions 14 and 15***

Existing Partner Track Record

r. Provide the following:

- a. ***As Supplemental Attachment 1, the experienced partner applicant, CMO, or ESP’s success in serving populations similar to the population that the applicant intends to serve, including evidence of academic success and successful management of non-academic school functions (e.g., back-office services, school operations, extracurricular programs)***

Supplemental Attachment 1 included? ☐ YES ☐ NO

- b. ***As Supplemental Attachment 2, an independent financial audit report and its most recent annual report of the experienced partner applicant, CMO, or ESP that demonstrated the financial health of the organization.***

Supplemental Attachment 2 included? ☐ YES ☐ NO

- c. ***A description of any history of charter revocations, non-renewals, withdrawals, or failures to open for the experienced partner applicant, CMO, or ESP:***

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d. If applying to manage a turnaround campus, evidence that:

- the partner organization has been in existence for at least three years prior to the undertaking of the management of the district campus
- the partner organization has managed multiple campuses for multiple years
- the partner organization has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses

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ESP or CMO Management Plan and Legal Relationship

s. Provide the following:

a. The name and address of the ESP or CMO:

Click or tap here to enter text.

b. As *Supplemental Attachment 3*, the Management Agreement between the ESP and the applicant organization that includes:

- ✓ A detailed description of the roles and responsibilities of the ESP
- ✓ A detailed explanation of the scope of services and costs of all resources to be provided by the ESP
- ✓ A detailed description of the oversight and evaluation methods that the board will use to oversee the ESP, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP's progress toward achieving agreed-upon goals
- ✓ A detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory
- ✓ A detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP and the schedule on which the ESP will receive compensation
- ✓ A detailed explanation of the financial responsibilities of the ESP, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP can make without obtaining board approval, and what reports ESP submit to the board on financial performance and on what schedule
- ✓ A detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed
- ✓ A detailed description of the grounds for which the ESP or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause
- ✓ An explanation and justification of any indemnification provisions in the event of default or breach by either party

Supplemental Attachment 3 included? ☐ YES ☐ NO

- c. An enforceable plan for the operation of the school in the case that the management agreement is terminated:**

Click or tap here to enter text.

- d. Assurance and evidence that the board is independent from the ESP or CMO and is self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed ESP or any affiliated business entities**

Click or tap here to enter text.

- e. A clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP supervisory responsibilities:**

Click or tap here to enter text.

- f. A detailed explanation and compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement. Such agreements must be consistent with the school's authority to terminate the ESP/CMO agreement and continue operation of the school:**

Click or tap here to enter text.

- g. A detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused:**

Click or tap here to enter text.

Appendix A

Section 2 – Educational Program

Curriculum and Instructional Design

c. A plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials:

Professional Development (PD) Calendar by Month for Challenge Early College High School, aligned to the HISD 2026–2027 calendar, curriculum implementation

Challenge Early College High School

Professional Development Calendar (2026–2027)

Month	Focus Area	Professional Development Topics	Delivery Structures
July–August (Pre-Service)	Foundation & Alignment	<ul style="list-style-type: none"> • Mission, Vision, Core Beliefs, High-Performance Culture • TEKS-aligned Curriculum Overview & Scope and Sequence Development • Programs: AP, Pre-AP, HCC Dual Credit, UT OnRamps, AVID • Lesson Planning Backward Design (Year → Unit → Week → Day) • Instructional Non-Negotiables & Lesson Internalization • Demonstrations of Learning (DOLs) & Formative Assessment • Technology Systems (Canvas, AP Classroom, OnTrack, Google) • Safety, Routines, and Campus Systems • Bell-to-Bell Instruction & Time-on-Task 	<ul style="list-style-type: none"> • District PD Days • Campus PD Sessions • Required Program-Specific Summer PD (College Board, HCC, UT OnRamps, AVID)
September	Instructional Rigor & Routines	<ul style="list-style-type: none"> • Instructional Cycle (Gradual Release / 5E) • Engagement Strategies & MRS • Classroom Environment & Expectations 	<ul style="list-style-type: none"> • PLCs (2x weekly) • Instructional Walks • Coaching & Feedback
October	Data & Differentiation	<ul style="list-style-type: none"> • Analyzing Early Formative Data • Differentiation in Mixed-Ability Classrooms • Acceleration vs. Remediation • Double-Blocking Structures (ELA & Math) 	<ul style="list-style-type: none"> • PLC Data Digs • Demo Day • Coaching Cycles
November	Literacy Across Content	<ul style="list-style-type: none"> • Writing & Academic Discourse • Extended & Short Constructed Responses • Reading, Annotation, and Text Complexity • Supporting EB & Special Populations 	<ul style="list-style-type: none"> • Content PLCs • Lesson Practice (“At-Bats”)

Month	Focus Area	Professional Development Topics	Delivery Structures
December	Assessment & Reflection	<ul style="list-style-type: none"> • Unit Assessments & DOL Quality • STAAR/EOC Alignment Check • Semester Data Review & Action Planning 	<ul style="list-style-type: none"> • PLCs • Department Data Reviews
January	Midyear Reset & Growth	<ul style="list-style-type: none"> • Instructional Adjustments Based on Semester Data • Re-Internalization of Curriculum & Lesson Design • Student Goal-Setting & AVID Monitoring 	<ul style="list-style-type: none"> • Campus PD Day • PLCs • Coaching
February	College Readiness Focus	<ul style="list-style-type: none"> • TSI Alignment & College Readiness Indicators • AP Exam & Dual Credit Readiness • UT OnRamps Assessment Calibration 	<ul style="list-style-type: none"> • PLCs • Program-Specific Meetings
March	Advanced Rigor & Mastery	<ul style="list-style-type: none"> • Moving Students from Meets to Masters • Higher-Order Questioning (Bloom's Taxonomy) • Performance Tasks & Error Analysis • STAAR/EOC Final Preparation • Summer School Draft Plans – Eagle Camp, HCC Summer 1 & 2, STAAR Test Preparation, TSI ELA & TSI MATH. • Summer Enrichment – HCC Camps/Robotics 	<ul style="list-style-type: none"> • Instructional Rounds • Demo Day
April	Assessment & Accountability	<ul style="list-style-type: none"> • Closing the Gaps Strategies -Planning for Summer School – Review of HCC Grades and graduation plans. • Academic Growth Monitoring • Planning for Summer School Professional developments 	<ul style="list-style-type: none"> • PLCs • Coaching & Walkthroughs
May	Reflection & Sustainability	<ul style="list-style-type: none"> • End-of-Year Data Review /Final Exam Reviews and Final Exams • Curriculum Effectiveness Analysis • Planning Adjustments for Next Year 	<ul style="list-style-type: none"> • Department Meetings • Leadership Reviews
June	Planning & Transition	<ul style="list-style-type: none"> • Teacher Reflection & Feedback • Updates to Scope & Sequence • Staffing & Program Transition Planning 	<ul style="list-style-type: none"> • Leadership Planning Sessions

Ongoing, Embedded Professional Learning (All Months)

- PLCs twice per week (Content + Grade Level)
- Instructional coaching, spot observations, and feedback cycles
- Instructional rounds, demo days, and lesson practice (“at-bats”)

- Program compliance PD (AP, HCC, UT OnRamps, AVID)
- Support for students at risk of not meeting graduation or college-readiness standards

High School Graduation Requirements and Exit Standards

a. Exit Standards for Graduating Students – Challenge Early College High School (CECHS)

Challenge Early College High School (CECHS) implements a rigorous Distinguished Level of Achievement graduation plan, requiring students to complete a minimum of 26 high school credits while simultaneously earning college credit through dual credit, UT OnRamps, and/or Advanced Placement (AP) coursework. As an Early College High School, CECHS is intentionally designed to ensure that all graduates leave high school college ready, career ready, and prepared to successfully transition to postsecondary education or the workforce.

Beginning with the **Class of 2022**, students must also complete a **FAFSA or TASFA** submission (unless exempted for good cause) as a graduation requirement.

Graduation Requirements

All CECHS graduates must:

- Complete 26 Texas high school credits aligned to the Distinguished Level of Achievement
- Earn at least one endorsement, with CECHS students primarily completing dual credit–aligned endorsements in the Multidisciplinary Studies area.
- Meet all STAAR/EOC assessment requirements as required by TEA
- Complete required college coursework through Houston City College (HCC), UT OnRamps, and/or AP
- Meet Texas College, Career, and Military Readiness (CCMR) indicators

Endorsement Pathways at CECHS

Texas offers five endorsement areas. Given our academic design and course offerings, the most common endorsements earned by CECHS students include:

• Multidisciplinary Studies Endorsement

Students may earn this endorsement by completing:

- Four advanced courses across one or more endorsement areas, or
- Four credits in each foundation subject area (including Chemistry and/or Physics and English IV or AP English), or
- Four credits in AP, IB, or dual credit selected from core content areas.

• Arts and Humanities Endorsement

Earned through advanced coursework in:

- Social Studies (five credits), or
- Languages Other Than English (multiple levels across one or more languages), or
- Advanced English courses such as English IV, Humanities, Creative Writing, Literary Genres, Research and Technical Writing, AP English Language, or AP English Literature.

• STEM Endorsement

Requires Algebra II, Chemistry, and Physics (or Physics for Engineering), plus:

- Additional advanced mathematics and/or science courses, or
- Approved STEM-related CTE programs of study (e.g., cybersecurity, robotics).

Because CECHS students are enrolled in Pre-AP, AP, HCC dual credit, UT OnRamps, and AVID, many naturally meet both endorsement and college credit requirements through their coursework.

Exit Standards: What CECHS Graduates Will Know and Be Able to Do

By the time students graduate from Challenge Early College High School, they will demonstrate the following competencies:



Academic & Content Mastery

- Master the Texas Essential Knowledge and Skills (TEKS) across all core content areas at the high school level
- Successfully complete college-level coursework aligned to HCC, UT OnRamps, and/or College Board AP standards
- Apply academic knowledge to complex, real-world problems using analysis, evaluation, and synthesis

College Readiness & Credit Attainment

- Earn college credit prior to graduation through:
 - HCC dual credit courses
 - UT OnRamps university-aligned courses
 - AP courses, with the opportunity to earn college credit by scoring 3 or higher on AP exams
- Meet or exceed TSI readiness standards or equivalent college-readiness measures
- Demonstrate the ability to succeed in a college classroom environment, including managing syllabi, deadlines, and academic expectations

Critical Thinking & Academic Skills

- Analyze complex texts and data, construct evidence-based arguments, and communicate clearly in writing and speech
- Use critical-thinking strategies to solve problems and justify reasoning
- Demonstrate strong information literacy, including research, evaluation of sources, and academic integrity

Academic Behaviors & Independence

- Exhibit organizational, time-management, and self-advocacy skills reinforced through the AVID program
- Monitor academic progress using data (grades, assessments, college performance) and adjust learning strategies accordingly
- Collaborate effectively with peers while also demonstrating independent learning skills

Postsecondary Readiness

- Graduate prepared for four-year universities, two-year colleges, trade or technical programs, military service, or direct entry into the workforce
- Develop a postsecondary plan aligned to individual goals, including college applications, financial aid awareness, and career exploration

Alignment to the Early College Model

CECHS's exit standards align directly to the Texas Early College High School and College and Career Readiness School Model, which emphasizes:

- Access to rigorous instruction for all students
- Early exposure to and success in college-level coursework
- Elimination of remediation after high school
- Equitable outcomes for students from historically underserved populations

Through this comprehensive graduation plan and clearly defined exit standards, Challenge Early College High School ensures that every graduate not only earns a Texas high school diploma with distinction, but also leaves with the knowledge, skills, college credit, and confidence necessary to succeed in postsecondary education and beyond.

Early Graduation Pathway (3 or 3.5 Years)

As part of its Early College design, Challenge Early College High School (CECHS) offers a limited early graduation pathway for a small number of students who demonstrate exceptional academic readiness, maturity, and a clearly defined postsecondary plan. This option is intentionally structured, highly selective, and not appropriate for all

students, as the primary goal of CECHS is deep academic preparation, college credit attainment, and long-term postsecondary success—not acceleration for its own sake.

Eligibility and Requirements for Early Graduation

Students seeking to graduate in three (3) or three and one-half (3.5) years must meet all of the following requirements:

- Complete the Distinguished Level of Achievement with 26 high school credits
- Successfully pass all required STAAR/EOC assessments
- Graduate with an Associate Degree earned through Houston City College (HCC)
- Meet Texas College, Career, and Military Readiness (CCMR) indicators
- Maintain strong academic standing in all college-level coursework (dual credit, UT OnRamps, and/or AP)
- Demonstrate consistent academic behaviors aligned to college readiness, including attendance, organization, time management, and self-advocacy

Application and Approval Process

Early graduation is **by application only** and includes multiple layers of review to ensure decisions are student-centered and academically sound:

- **Formal application** submitted by the student
- **Written postsecondary plan** outlining goals after high school (four-year university, advanced college coursework, career pathway, or other approved postsecondary option)
- **Parent/guardian approval**, required no earlier than **10th grade**, acknowledging the academic, social, and developmental implications of early graduation
- **Campus approval**, including review by school leadership, counselors, and Early College staff to ensure readiness and alignment with long-term success

Approval is granted **only when early graduation clearly benefits the student's academic and postsecondary trajectory** and does not compromise depth of learning, college success, or social-emotional readiness.

Purpose and Benefits of the Early Graduation Option

The early graduation pathway exists to support **highly prepared students** who are ready to transition fully into postsecondary education sooner, while maintaining the integrity of the Early College model. Benefits may include:

- Earlier entry into upper-division college coursework after earning an Associate Degree
- Reduced overall time and cost to complete a bachelor's degree
- Increased flexibility to pursue competitive academic, research, or career opportunities
- Continued alignment with CECHS's mission of expanding access to higher education

Guardrails and Expectations

CECHS emphasizes that **early graduation is not the default expectation** and is not encouraged unless it is clearly in the student's best interest. Many students benefit from completing the full four-year Early College experience, which allows additional time for:

- Advanced coursework and enrichment
- Leadership development
- Academic depth and college readiness refinement
- Social-emotional growth

By maintaining clear eligibility criteria, a formal approval process, and strong safeguards, Challenge Early College High School ensures that early graduation decisions uphold academic rigor, equity, and the long-term success of each student.

High School Graduation Requirements & Exit Standards

(TEA-Aligned | Updated per 19 TAC Chapter 74) - Grades 9-12 - For Students Entering 9th Grade in or after 2014-2015

	Foundation	Challenge ECHS Graduation Requirements Distinguished Level of Achievement
English (A) Chapter 110 – English Language Arts and Reading (ELAR)	4 Credits: English 1, 2, 3, 4	4 Credits: English I, 2, 3, 4
Mathematics (B) Chapter 111 – Mathematics	3 Credits to include: Algebra I, Geometry, and Algebra 2	4 Credits to include: Algebra I, Geometry, Algebra 2, and an Upper Level Math
Science (C) Chapter 112 – Science	3 Credits to include: Biology and one of the following: IPC, Chemistry, or Physics plus an Upper Level Science	4 Credits to include: Biology and one of the following: IPC, Chemistry, or Physics plus 2 Upper Level Sciences
Social Studies (D) Chapter 113 – Social Studies	4 Credits to include: W. Geography, W. History, US History, .5 Economics, & .5 Government	4 Credits to include: W. Geography /AP Human Geography, W. History / AP World History, AP/Dual Credit US History, .5 Economics, & .5 Government
Foreign Language (E) Chapter 114 – Languages Other Than English (LOTE)	2 Credits	2 Credits
Physical Education (G) Chapter 116 – Physical Education	1 Credit	1 Credit
Fine Arts (H) Chapter 117 – Fine Arts	1 Credit	1 Credit
Health (F) Chapter 115 – Health Education	0.5 Credit	0.5 Credit
Electives	3.5 Credits	5.5 Credits
Total Credits	22 Credits	26 Credits
Endorsements Declaration Options		<ul style="list-style-type: none"> *Multidisciplinary *Arts & Humanities *STEM (requires Alg2, Chem, Physics) *Business & industry *Public Services
Additional Considerations	<p>Meet required performance standards on state assessments: STAAR EOC Eng I, Eng II, BIO, ALG 1, US History.</p> <p>CCMR Indicator, CPR & Peace Officer Training, FAFSA/TASFA, (3) College Applications, Schoollinks Surveys, Personal Graduation Plan (PGP), & Senior Conference wh Counselor</p>	<p>Meet required performance standards on state assessments: STAAR EOC Eng I, Eng II, BIO, ALG 1, US History.</p> <p>CCMR Indicator, CPR & Peace Officer Training, FAFSA/TASFA, (3) College Applications, Schoollinks Surveys, Personal Graduation Plan (PCP), & Senior Conference wh Counselor</p>

Grade-Level Course Sequence

This page outlines a grade-level course sequence designed to guide students along a clear, intentional pathway toward graduation, with the ultimate goal of earning a Distinguished Level of Achievement high school diploma and an Associate Degree through Houston Community College. Course selections are aligned by grade level to support long-term planning and ensure students remain on track for both high school and college completion.

The grade-level Assistant Principal works closely with counselors, registrar, teachers, and families to analyze each student's academic record, attendance history, assessment data, and individual needs in order to build a schedule that best supports student success. Because students progress at different rates, schedules are intentionally differentiated—some students may require additional supports, double-blocked courses, or adjusted pacing to ensure mastery and long-term success.

Each grade level has clearly defined milestones, including passing TSI English and Mathematics, meeting STAAR/EOC requirements, and successfully completing a targeted number of dual credit courses each year. When students need additional time to meet these benchmarks, summer learning opportunities are provided to help close gaps and maintain momentum.

These supports are not punitive; they are designed with the sole purpose of helping students reach the finish line—college ready, confident, and prepared for their next step after high school. At Challenge Early College High School, we believe in every student's potential, and we remain committed to walking alongside them, providing the guidance, structure, and encouragement needed to help them achieve their academic and postsecondary goals.

Based on ongoing data analysis, including STAAR, classroom formative assessments, TSI indicators, and college readiness benchmarks, CECHS implements strategic double-blocking and intervention structures to meet student needs. Ninth- and tenth-grade students requiring additional literacy support are double-blocked in reading and English courses, while students identified as at-risk, emergent bilingual, special education, or not yet meeting TSI standards receive targeted instructional time and supports. In mathematics, students needing additional support in Pre-AP Algebra I or Algebra II/Math 1314 are double-blocked to ensure sufficient time to master foundational concepts critical for college-level success. AVID classes further support students by explicitly teaching organization, note-taking, time management, goal setting, and self-advocacy, enabling students to reflect on assessment data and actively monitor their progress.

Internship Opportunity

Genesys Works is a nationally recognized nonprofit organization that prepares high school students, especially those from underserved communities for successful careers by combining rigorous training with paid, year-long professional internships.

The program begins with an eight-week summer training that builds essential technical, business, and professional skills, including communication, workplace etiquette, and technology competencies. After completing training, students are matched with corporate partners for a paid internship that typically spans their senior year, working approximately 15–20 hours per week while continuing to attend high school. Throughout the internship experience, Genesys Works also provides college and career coaching, financial aid guidance, and structured support, and continues offering alumni support as students transition to postsecondary education and careers. This model has been shown to increase college enrollment and career readiness for participants from historically underrepresented backgrounds, helping bridge the gap between school and workforce expectations.

At Challenge Early College High School, students can apply to Genesys Works during the second semester of their junior year as part of AVID 3, when they begin planning senior schedules. Participation is contingent on rigorous academic eligibility—students must be on track to meet graduation requirements, complete their college pathway including Associate Degree progress with Houston City College, and maintain strong attendance—as well as having sufficient space in their senior schedule to attend two classes per day alongside their internship commitment. Counselors review student readiness, and recommendations are submitted to Genesys Works for students demonstrating the maturity, reliability, and academic stability necessary for success in a professional environment. This partnership gives CECHS students the opportunity to apply what they are learning academically, earn income, build professional networks, and gain real-world experience that complements their college and career planning.



Some of the resources used in this document are listed below:

HISD Resources:

- HISD Graduation Requirements (district site):
<https://www.houstonisd.org/families-students/student-requirements-expectations/graduation-requirements>
- HB5 Graduation Requirements Flyer (HISD):
https://tx01001591.schoolwires.net/cms/lib2/TX01001591/Centricity/Domain/56622/HB-5_Graduation-Requirements_Flyer_ENG.pdf

TEA Resource:

- Full Texas Administrative Code (TAC) Graduation Requirements PDF:
<https://tea.texas.gov/about-tea/laws-and-rules/sboe-rules-tac/sboe-tac-currently-in-effect/ch074b.pdf>
(There is also an attachment for this part, serves as a reference)



Attachment 2 — Enrollment Policy

Challenge Early College High School (CECHS)

I. Purpose

The purpose of this Enrollment Policy is to define the procedures and requirements under which students may enroll at Challenge Early College High School (CECHS), ensure compliance with the Texas Education Code and applicable state and federal laws, and outline the lottery process used when applications exceed available capacity. This policy affirms that CECHS is open to all eligible students and does not discriminate based on academic performance, race, ethnicity, disability, language status, socioeconomic status, or any other nonstatutory criteria.

Alignment to CCRSM and ECHS Outcomes-Based Measures

As a Texas College and Career Readiness School Model (CCRSM)–designated Early College High School (ECHS), CECHS is required to meet specific **Outcomes-Based Measures (OBMs)** outlined in the ECHS Blueprint in order to maintain its **Designated with Distinction** status. These measures include required access indicators and access distinction indicators that limit underrepresentation of key student groups relative to district averages, including students identified as at risk, economically disadvantaged, emergent bilingual, and students with disabilities. Because CECHS currently participates in the Houston ISD School of Choice lottery process, enrollment patterns generated through this centralized system may directly affect the campus’s ability to meet CCRSM access OBMs. CECHS therefore conducts regular reviews of enrollment outcomes to ensure continued compliance with TEA requirements. If permitted under TEA guidance, CECHS may explore adjustments to enrollment structures or lottery processes to maintain alignment with CCRSM access expectations and ECHS Outcomes-Based Measures while ensuring that the campus remains open, equitable, and non-selective.

Failure to meet OBM standards may result in a **Designated – Needs Improvement** status for up to three school years, during which CECHS would remain in the CCRSM network. During this period, CECHS would continue to implement the ECHS Blueprint with fidelity, enroll underserved students, and ensure students have the opportunity to earn both a high school diploma and up to 60 college credit hours or an associate degree. The proposed 1882 partnership transition is viewed as an opportunity to proactively align governance and enrollment systems to sustain equity, access, and Distinguished ECHS status under TEA’s CCRSM framework.

II. Eligibility and Open Enrollment

CECHS is a School of Choice campus within Houston ISD that does not screen or select students based on academic performance, entrance exams, or prerequisite coursework. All eligible students who submit a timely application are included in the district’s centralized enrollment process.

CECHS does not charge tuition or enrollment fees.

CECHS eligibility requirements:

1. Student must be entering Grades 9–12 (or equivalent grade levels).
2. Student must reside within the HISD attendance zone or be eligible to attend HISD through open enrollment policies.
3. Student must submit a complete School of Choice application by the published deadline.
4. Students with disabilities, emergent bilingual students, economically disadvantaged students, and other at-risk populations are fully eligible to apply and enroll.

III. Enrollment Process

CECHS participates in the HISD School of Choice and Magnet admissions process, administered by the HISD Enrollment Management Division. The district provides all parents access to the Magnet Hub portal, including program descriptions, eligibility information, and a common application platform.

Key steps:

1. **Information and Outreach:** Beginning in the fall, CECHS conducts outreach to students and families, including campus tours, informational presentations, and support for completing applications.



2. **School of Choice Application:** Parents complete the HISD School of Choice application via the Magnet Hub during the open application window.
3. **District Verification:** HISD verifies residency, eligibility, and completeness of applications.
4. **Lottery Assignment:** All eligible applications are included in the district's randomized lottery process if more students apply than available seats.

IV. Lottery Process

When the number of eligible applicants exceeds available seats, enrollment is determined by a **randomized lottery process** administered by HISD in compliance with the Texas Education Code and TEA guidance.

Lottery assurances include:

- Equal chance of selection for all eligible applicants
- No screening based on academic achievement, disability, language proficiency, race, ethnicity, discipline history, or immigration status
- Consistent and transparent lottery procedures applied across HISD School of Choice campuses

Waitlist Procedures:

- A waitlist is generated following the lottery.
- Waitlists are valid for the current academic year only unless otherwise specified by HISD policy.
- Families are contacted in lottery order as seats become available.

V. Enrollment of Students with Special Populations

CECHS ensures equitable access for all student populations:

- **Students with Disabilities:** Included fully in the lottery process; transition ARD meetings are held upon placement to determine appropriate accommodations.
- **Emergent Bilingual Students:** Eligible without restriction and provided access to academic and language supports.
- **At-Risk and Economically Disadvantaged Students:** Fully eligible and supported through schoolwide academic and wraparound systems.

VI. Registration and District Requirements

Upon placement at CECHS, families complete registration in accordance with HISD policies, including:

- Proof of residency within HISD (or open enrollment eligibility)
- Birth verification
- Immunization and health requirements
- Academic records and transcripts
- Special education, 504, Emergent Bilingual and any other records (if applicable)
- Parent/guardian contact information

CECHS collaborates with the HISD registrar and enrollment teams to ensure that all registration and placement documents are collected in compliance with state and local guidelines.

VII. Non-Discrimination Assurance

CECHS, as part of HISD, operates under all applicable state and federal non-discrimination laws, including:

- Title VI of the Civil Rights Act
- Title IX of the Education Amendments
- Section 504 of the Rehabilitation Act
- Individuals with Disabilities Education Act (IDEA)
- Texas Education Code requirements

VIII. Communication of Policy

This policy is made publicly available through:



- CECHS and HISD websites
- Parent information sessions and outreach events
- Enrollment materials and translated documents as needed

IX. Review and Compliance

This policy is reviewed annually and updated as needed to reflect changes in TEA, HISD, or federal enrollment regulations.

Chapter 74. Curriculum Requirements

Subchapter B. Graduation Requirements

§74.11. High School Graduation Requirements.

- (a) To receive a high school diploma, a student entering Grade 9 in the 2014-2015 school year and thereafter must complete the following:
 - (1) in accordance with subsection (d) of this section, requirements of the Foundation High School Program specified in §74.12 of this title (relating to Foundation High School Program);
 - (2) testing requirements for graduation as specified in Chapter 101 of this title (relating to Assessment); and
 - (3) demonstrated proficiency, in Grade 8 or higher, as determined by the district in which the student is enrolled, in delivering clear verbal messages; choosing effective nonverbal behaviors; listening for desired results; applying valid critical-thinking and problem-solving processes; and identifying, analyzing, developing, and evaluating communication skills needed for professional and social success in interpersonal situations, group interactions, and personal and professional presentations.
- (b) Beginning with students enrolled in Grade 12 during the 2021-2022 school year, each student in Grade 12 must complete and submit a free application for federal student aid (FAFSA) or a Texas application for state financial aid (TASFA) before graduating from high school.
 - (1) A student may graduate under the Foundation High School Program without completing a financial aid application if:
 - (A) the student's parent or other person standing in parental relation submits a signed form, approved by the Texas Education Agency (TEA), indicating that the parent or other person declines to complete and submit the application or authorizes the student to decline to complete and submit the financial aid application;
 - (B) the student signs and submits the form described by paragraph (1) of this subsection on the student's own behalf if the student is 18 years of age or older or has been emancipated under Texas Family Code, Chapter 31; or
 - (C) a school counselor authorizes the student to decline to complete and submit the financial aid application for good cause, as determined by the school counselor.
 - (2) A school counselor may not indicate that a student has not complied with this subsection if the school district or open-enrollment charter school fails to provide the form described by paragraph (1)(A) of this subsection to the student or the student's parent or guardian.
- (c) A school district shall clearly indicate the distinguished level of achievement under the Foundation High School Program, an endorsement, and a performance acknowledgment on the transcript or academic achievement record (AAR) of a student who satisfies the applicable requirements.
- (d) A student entering Grade 9 in the 2014-2015 school year and thereafter shall enroll in the courses necessary to complete the curriculum requirements for the Foundation High School Program specified in §74.12 of this title and the curriculum requirements for at least one endorsement specified in §74.13 of this title (relating to Endorsements).
- (e) A student may graduate under the Foundation High School Program without earning an endorsement if, after the student's sophomore year:
 - (1) the student and the student's parent or person standing in parental relation to the student are advised by a school counselor of the specific benefits of graduating from high school with one or more endorsements; and

- (2) the student's parent or person standing in parental relation to the student files with a school counselor written permission, on a form adopted by the TEA, allowing the student to graduate under the Foundation High School Program without earning an endorsement.
- (f) A student may earn a distinguished level of achievement by successfully completing the curriculum requirements for the Foundation High School Program and the curriculum requirements for at least one endorsement required by the Texas Education Code (TEC), §28.025(b-15), including four credits in science and four credits in mathematics to include Algebra II.
- (g) An out-of-state or out-of-country transfer student (including foreign exchange students) or a transfer student from a Texas nonpublic school is eligible to receive a Texas diploma but must complete all requirements of this section to satisfy state graduation requirements. Any course credit required in this section that is not completed by the student before he or she enrolls in a Texas school district may be satisfied through the provisions of §74.23 of this title (relating to Correspondence Courses and Distance Learning) and §74.24 of this title (relating to Credit by Examination) or by completing the course or courses according to the provisions of §74.26 of this title (relating to Award of Credit).
- (h) Elective credits may be selected from the following:
 - (1) high school courses not required for graduation that are listed in the following chapters of this title:
 - (A) Chapter 110 of this title (relating to Texas Essential Knowledge and Skills for English Language Arts and Reading);
 - (B) Chapter 111 of this title (relating to Texas Essential Knowledge and Skills for Mathematics);
 - (C) Chapter 112 of this title (relating to Texas Essential Knowledge and Skills for Science);
 - (D) Chapter 113 of this title (relating to Texas Essential Knowledge and Skills for Social Studies);
 - (E) Chapter 114 of this title (relating to Texas Essential Knowledge and Skills for Languages Other Than English);
 - (F) Chapter 115 of this title (relating to Texas Essential Knowledge and Skills for Health Education);
 - (G) Chapter 116 of this title (relating to Texas Essential Knowledge and Skills for Physical Education);
 - (H) Chapter 117 of this title (relating to Texas Essential Knowledge and Skills for Fine Arts);
 - (I) Chapter 127 of this title (relating to Texas Essential Knowledge and Skills for Career Development and Career and Technical Education); and
 - (J) Chapter 130 of this title (relating to Texas Essential Knowledge and Skills for Career and Technical Education);
 - (2) state-approved innovative courses as specified in §74.27 of this title (relating to Innovative Courses and Programs);
 - (3) Junior Reserve Officer Training Corps (JROTC)--one to four credits;
 - (4) Driver Education--one-half credit; and
 - (5) College preparatory English language arts or mathematics courses developed and offered pursuant to the TEC, §28.014.
- (i) Courses offered for dual credit at or in conjunction with an institution of higher education that provide advanced academic instruction beyond, or in greater depth than, the essential knowledge and skills for the equivalent high school course required for graduation may satisfy graduation requirements, including requirements for required courses, advanced courses, and courses for elective credit as well as requirements for endorsements.

- (j) A student may not be enrolled in a course that has a required prerequisite unless:
 - (1) the student has successfully completed the prerequisite course(s);
 - (2) the student has demonstrated equivalent knowledge as determined by the school district; or
 - (3) the student was already enrolled in the course in an out-of-state, an out-of-country, or a Texas nonpublic school and transferred to a Texas public school prior to successfully completing the course.
- (k) A district may exempt a student from a specific career and technical education (CTE) course prerequisite for a CTE course that satisfies a mathematics or science credit if the district determines the student is not using the course to complete a CTE program of study.
- (l) A district may award credit for a course a student completed without meeting the prerequisites if the student completed the course in an out-of-state, an out-of-country, or a Texas nonpublic school where there was not a prerequisite.
- (m) A district shall allow a student who successfully completes AP Computer Science A or IB Computer Science Higher Level to satisfy both one advanced mathematics requirement and one languages other than English requirement for graduation.
- (n) Each school district shall annually report to the TEA the names of the locally developed courses, programs, institutions of higher education, and internships in which the district's students have enrolled as authorized by the TEC, §28.002(g-1). The TEA shall make available information provided under this subsection to other districts. If a district chooses, it may submit any locally developed course for approval under §74.27 of this title as an innovative course.
- (o) Each school district shall annually report to the TEA the names of cybersecurity courses approved by the board of trustees for credit and the institutions of higher education in which the district's students have enrolled as authorized by the TEC, §28.002(g-3). The TEA shall make available information provided under this subsection to other districts. If a district chooses, it may submit any locally developed course for approval under §74.27 of this title as an innovative course.
- (p) A school district shall permit a student to comply with the curriculum requirements under the Foundation High School Program by successfully completing appropriate courses in the core curriculum of an institution of higher education (IHE). A student who has completed the core curriculum of an IHE in accordance with TEC, §61.822, as certified by the IHE in accordance with §4.28 of this title (relating to Core Curriculum):
 - (1) is considered to have earned an endorsement by successfully completing the appropriate courses for that endorsement;
 - (2) is considered to have earned a distinguished level of achievement under the Foundation High School Program; and
 - (3) is entitled to receive a high school diploma.

Statutory Authority: The provisions of this §74.11 issued under the Texas Education Code, §§7.102(c)(4); 28.002; 28.018; 28.025; and 28.0256(a), (b), and (d).

Source: The provisions of this §74.11 adopted to be effective July 8, 2014, 39 TexReg 5149; amended to be effective August 22, 2016, 41 TexReg 5040; amended to be effective August 27, 2018, 43 TexReg 4190; amended to be effective November 24, 2019, 44 TexReg 7050; amended to be effective August 1, 2020, 45 TexReg 4178; amended to be effective August 1, 2021, 46 TexReg 3874; amended to be effective August 1, 2022, 47 TexReg 4502.

§74.12. Foundation High School Program.

- (a) Credits. A student must earn at least 22 credits to complete the Foundation High School Program.
- (b) Core courses. A student must demonstrate proficiency in the following.
 - (1) English language arts--four credits. Two of the credits must consist of English I and II. (Students with limited English proficiency who are at the beginning or intermediate level of English language proficiency, as defined by §74.4(d) of this title (relating to English Language Proficiency Standards), may satisfy the English I and English II graduation requirements by successfully completing English I for Speakers of Other Languages and English II for Speakers of Other Languages.) A third credit must consist of English III, a comparable Advanced Placement (AP) English language arts course that does not count toward another credit required for graduation, or a comparable International Baccalaureate (IB) English language arts course that meets all the requirements in §110.33 of this title (relating to English Language Arts and Reading, English III (One Credit), Beginning with School Year 2009-2010). A fourth credit may be selected from one full credit or a combination of two half credits from two different courses, subject to prerequisite requirements, from the following courses:
 - (A) English IV;
 - (B) Independent Study in English;
 - (C) Literary Genres;
 - (D) Creative Writing;
 - (E) Research and Technical Writing;
 - (F) Humanities;
 - (G) Public Speaking III;
 - (H) Communication Applications, which must be combined with another half credit from the other courses listed in subparagraphs (A)-(G) and (I)-(S) of this paragraph;
 - (I) Oral Interpretation III;
 - (J) Debate III;
 - (K) Independent Study in Speech;
 - (L) Independent Study in Journalism;
 - (M) Advanced Broadcast Journalism III;
 - (N) Advanced Journalism: Newspaper III;
 - (O) Advanced Journalism: Yearbook III;
 - (P) a comparable Advanced Placement (AP) English language arts course that does not count toward another credit required for graduation;
 - (Q) a comparable International Baccalaureate (IB) English language arts course that meets all the requirements in §110.34 of this title (relating to English Language Arts and Reading, English IV (One Credit), Beginning with School Year 2009-2010);
 - (R) after the successful completion of English I, II, and III, a locally developed English language arts course or other activity, including an apprenticeship or training hours needed to obtain an industry-recognized credential or certificate that is developed pursuant to the Texas Education Code (TEC), §28.002(g-1);
 - (S) Business English; and
 - (T) a college preparatory English language arts course that is developed pursuant to the TEC, §28.014.

- (2) Mathematics--three credits. Two of the credits must consist of Algebra I and Geometry.
- (A) The additional credit may be selected from one full credit or a combination of two half credits from two different courses, subject to prerequisite requirements, from the following courses or a credit selected from the courses listed in subparagraph (B) of this paragraph:
- (i) Mathematical Models with Applications;
 - (ii) Mathematical Applications in Agriculture, Food, and Natural Resources;
 - (iii) Digital Electronics;
 - (iv) Financial Mathematics;
 - (v) Applied Mathematics for Technical Professionals;
 - (vi) Accounting II;
 - (vii) Manufacturing Engineering Technology II; and
 - (viii) Robotics II.
- (B) The additional credit may be selected from one full credit or a combination of two half credits from two different courses, subject to prerequisite requirements, from the following courses:
- (i) Algebra II;
 - (ii) Precalculus;
 - (iii) Advanced Quantitative Reasoning;
 - (iv) Independent Study in Mathematics;
 - (v) Discrete Mathematics for Problem Solving;
 - (vi) Algebraic Reasoning;
 - (vii) Statistics;
 - (viii) a comparable AP mathematics course that does not count toward another credit required for graduation;
 - (ix) AP Computer Science A;
 - (x) IB Computer Science Higher Level;
 - (xi) Engineering Mathematics;
 - (xii) Statistics and Business Decision Making;
 - (xiii) Mathematics for Medical Professionals;
 - (xiv) Discrete Mathematics for Computer Science;
 - (xv) pursuant to the TEC, §28.025(b-5), after the successful completion of Algebra II, a mathematics course endorsed by an institution of higher education as a course for which the institution would award course credit or as a prerequisite for a course for which the institution would award course credit. The Texas Education Agency (TEA) shall maintain a current list of courses offered under this clause; and
 - (xvi) after the successful completion of Algebra I and Geometry, a locally developed mathematics course or other activity, including an apprenticeship or training hours needed to obtain an industry-recognized credential or certificate that is developed pursuant to the TEC, §28.002(g-1).

- (C) One credit of a two-credit IB mathematics course selected from Chapter 111 of this title (relating to Texas Essential Knowledge and Skills for Mathematics) may satisfy the additional mathematics credit.
- (3) Science--three credits. One credit must consist of Biology or a comparable AP or IB biology course.
 - (A) One credit must be selected from the following laboratory-based courses:
 - (i) Integrated Physics and Chemistry;
 - (ii) Chemistry;
 - (iii) Physics;
 - (iv) Physics for Engineering; and
 - (v) a comparable AP or IB chemistry or physics course that does not count toward another credit required for graduation.
 - (B) The additional credit may be selected from one full credit or a combination of two half credits from two different courses, subject to prerequisite requirements, from the following laboratory-based courses:
 - (i) Chemistry;
 - (ii) Physics;
 - (iii) Aquatic Science;
 - (iv) Astronomy;
 - (v) Earth Systems Science;
 - (vi) Environmental Systems;
 - (vii) Specialized Topics in Science;
 - (viii) a comparable AP science course that does not count toward another credit required for graduation;
 - (ix) Advanced Animal Science;
 - (x) Advanced Plant and Soil Science;
 - (xi) Anatomy and Physiology;
 - (xii) Medical Microbiology;
 - (xiii) Pathophysiology;
 - (xiv) Food Science;
 - (xv) Forensic Science;
 - (xvi) Biotechnology I;
 - (xvii) Biotechnology II;
 - (xviii) Physics for Engineering;
 - (xix) Scientific Research and Design;
 - (xx) Engineering Design and Problem Solving;
 - (xxi) Engineering Science;
 - (xxii) pursuant to the TEC, §28.025(b-5), after the successful completion of physics, a science course endorsed by an institution of higher education as a course for which the institution would award course credit or as a prerequisite for a course

for which the institution would award course credit. The TEA shall maintain a current list of courses offered under this clause;

- (xxiii) a locally developed science course or other activity, including an apprenticeship or training hours needed to obtain an industry-recognized credential or certificate that is developed pursuant to the TEC, §28.002(g-1); and
 - (xxiv) one credit of a two-credit IB science course selected from Chapter 112 of this title (relating to Texas Essential Knowledge and Skills for Science).
 - (C) Credit may not be earned for both physics and Physics for Engineering to satisfy science credit requirements.
- (4) Social studies--three credits.
 - (A) One credit must consist of United States History Studies Since 1877.
 - (B) One-half credit must consist of United States Government.
 - (C) One-half credit must be selected from the following:
 - (i) Economics with Emphasis on the Free Enterprise System and Its Benefits; or
 - (ii) Personal Financial Literacy/Economics.
 - (D) One credit must be selected from the following:
 - (i) World History Studies;
 - (ii) World Geography Studies; or
 - (iii) a comparable AP or IB world history or world geography course that does not count toward another credit required for graduation.
- (5) Languages other than English (LOTE)--two credits.
 - (A) The credits may be selected from the following:
 - (i) any two levels in the same language, including comparable AP or IB language courses that do not count toward another credit required for graduation; or
 - (ii) two credits in computer programming languages, including computer coding, to be selected from Computer Science I, II, and III, AP Computer Science Principles, AP Computer Science A, IB Computer Science Standard Level, and IB Computer Science Higher Level.
 - (B) A single two-credit IB LOTE course may only satisfy one LOTE requirement.
 - (C) If a student, in completing the first credit of LOTE, demonstrates that the student is unlikely to be able to complete the second credit, the student may substitute another appropriate course as follows:
 - (i) Special Topics in Language and Culture;
 - (ii) World History Studies or World Geography Studies for a student who is not required to complete both by the local district;
 - (iii) another credit selected from Chapter 114 of this title (relating to Texas Essential Knowledge and Skills for Languages Other Than English); or
 - (iv) computer programming languages, including computer coding.
 - (D) The determination regarding a student's ability to complete the second credit of LOTE must be agreed to by:
 - (i) the teacher of the first LOTE credit course or another LOTE teacher designated by the school district, the principal or designee, and the student's parent or person standing in parental relation;

- (ii) the student's admission, review, and dismissal (ARD) committee if the student receives special education services under the TEC, Chapter 29, Subchapter A; or
 - (iii) the committee established for the student under Section 504, Rehabilitation Act of 1973 (29 United States Code, Section 794) if the student does not receive special education services under the TEC, Chapter 29, Subchapter A, but is covered by the Rehabilitation Act of 1973.
 - (E) A student, who due to a disability, is unable to complete two credits in the same language in a language other than English, may substitute a combination of two credits that are not being used to satisfy another specific graduation requirement selected from English language arts, mathematics, science, or social studies or two credits in career and technical education for the LOTE credit requirements. The determination regarding a student's ability to complete the LOTE credit requirements will be made by:
 - (i) the student's ARD committee if the student receives special education services under the TEC, Chapter 29, Subchapter A; or
 - (ii) the committee established for the student under Section 504, Rehabilitation Act of 1973 (29 United States Code, Section 794) if the student does not receive special education services under the TEC, Chapter 29, Subchapter A, but is covered by the Rehabilitation Act of 1973.
 - (F) A student who successfully completes a dual language immersion/two-way or dual language immersion/one-way program in accordance with §89.1210(d)(3) and (4) of this title (relating to Program Content and Design), §89.1227 of this title (relating to Minimum Requirements for Dual Language Immersion Program Model), and §89.1228 of this title (relating to Two-Way Dual Language Immersion Program Model Implementation) at an elementary school may satisfy one credit of the two credits required in a language other than English.
 - (i) To successfully complete a dual language immersion program, a student must:
 - (I) have participated in a dual language immersion program for at least five consecutive school years;
 - (II) achieve high levels of academic competence as demonstrated by performance of meets or masters grade level on both the mathematics and reading State of Texas Assessments of Academic Readiness (STAAR®) in English or Spanish, as applicable, in at least one grade level; and
 - (III) achieve proficiency in both English and a language other than English as demonstrated by scores of proficient or higher in the reading and speaking domains on language proficiency or achievement tests in both languages.
 - (ii) The second credit of a language other than English must be in the same language as the successfully completed dual language immersion program.
 - (G) A student who successfully completes a course in American Sign Language while in elementary school may satisfy one credit of the two credits required in a language other than English.
- (6) Physical education--one credit.
 - (A) The required credit may be selected from one full credit or a combination of two half credits from two different courses from the following courses:
 - (i) Lifetime Fitness and Wellness Pursuits;
 - (ii) Lifetime Recreation and Outdoor Pursuits; and
 - (iii) Skill-Based Lifetime Activities.

- (B) In accordance with local district policy, the required credit may be earned through completion of any Texas essential knowledge and skills-based course that meets the requirement in subparagraph (E) of this paragraph for 100 minutes of moderate to vigorous physical activity per five-day school week and that is not being used to satisfy another specific graduation requirement.
- (C) In accordance with local district policy, credit for any of the courses listed in subparagraph (A) of this paragraph may be earned through participation in the following activities:
 - (i) Athletics;
 - (ii) Junior Reserve Officer Training Corps (JROTC); and
 - (iii) appropriate private or commercially sponsored physical activity programs conducted on or off campus. The district must apply to the commissioner of education for approval of such programs, which may be substituted for state graduation credit in physical education. Such approval may be granted under the following conditions.
 - (I) Olympic-level participation and/or competition includes a minimum of 15 hours per week of highly intensive, professional, supervised training. The training facility, instructors, and the activities involved in the program must be certified by the superintendent to be of exceptional quality. Students qualifying and participating at this level may be dismissed from school one hour per day. Students dismissed may not miss any class other than physical education.
 - (II) Private or commercially sponsored physical activities include those certified by the superintendent to be of high quality and well supervised by appropriately trained instructors. Student participation of at least five hours per week must be required. Students certified to participate at this level may not be dismissed from any part of the regular school day.
- (D) In accordance with local district policy, up to one credit for any one of the courses listed in subparagraph (A) of this paragraph may be earned through participation in any of the following activities:
 - (i) Drill Team;
 - (ii) Marching Band; and
 - (iii) Cheerleading.
- (E) All substitution activities allowed in subparagraphs (B)-(D) of this paragraph must include at least 100 minutes per five-day school week of moderate to vigorous physical activity.
- (F) Credit may not be earned more than once for the courses identified in subparagraph (A)(i) and (iii) of this paragraph. Credit may not be earned more than twice for the course identified in subparagraph (A)(ii) of this paragraph. No more than four substitution credits may be earned through any combination of substitutions allowed in subparagraphs (B)-(D) of this paragraph.
- (G) A student who is unable to participate in physical activity due to disability or illness may substitute an academic elective credit (English language arts, mathematics, science, or social studies) or a course that is offered for credit as provided by the TEC, §28.002(g-1), for the physical education credit requirement. The determination regarding a student's ability to participate in physical activity will be made by:
 - (i) the student's ARD committee if the student receives special education services under the TEC, Chapter 29, Subchapter A;

- (ii) the committee established for the student under Section 504, Rehabilitation Act of 1973 (29 United States Code, Section 794) if the student does not receive special education services under the TEC, Chapter 29, Subchapter A, but is covered by the Rehabilitation Act of 1973; or
 - (iii) a committee established by the school district of persons with appropriate knowledge regarding the student if each of the committees described by clauses (i) and (ii) of this subparagraph is inapplicable. This committee shall follow the same procedures required of an ARD or a Section 504 committee.
- (7) Fine arts--one credit.
 - (A) The credit may be selected from the following courses subject to prerequisite requirements:
 - (i) Art, Level I, II, III, or IV;
 - (ii) Dance, Level I, II, III, or IV;
 - (iii) Music, Level I, II, III, or IV;
 - (iv) Music Studies;
 - (v) Theatre, Level I, II, III, or IV;
 - (vi) Musical Theatre, Level I, II, III, or IV;
 - (vii) Technical Theatre, Level I, II, III, or IV;
 - (viii) IB Film Standard or Higher Level;
 - (ix) Floral Design;
 - (x) Digital Art and Animation; and
 - (xi) 3-D Modeling and Animation.
 - (B) In accordance with local district policy, credit may be earned through participation in a community-based fine arts program not provided by the school district in which the student is enrolled. The district must apply to the commissioner of education for approval of such programs, which may be substituted for state graduation credit in fine arts. Approval may be granted if the fine arts program provides instruction in the essential knowledge and skills identified for a fine arts course as defined by Chapter 117, Subchapter C, of this title (relating to High School, Adopted 2013).
- (c) Elective courses--five credits. The credits must be selected from the list of courses specified in §74.11(g) or (h) of this title (relating to High School Graduation Requirements) or from a locally developed course or activity developed pursuant to the TEC, §28.002(g-1), for which a student may receive credit and that does not satisfy a specific course requirement.
- (d) Substitutions. No substitutions are allowed in the Foundation High School Program, except as specified in this chapter.

Statutory Authority: The provisions of this §74.12 issued under the Texas Education Code, §§7.102(c)(4); 28.002; 28.018; and 28.025.

Source: The provisions of this §74.12 adopted to be effective July 8, 2014, 39 TexReg 5149; amended to be effective August 22, 2016, 41 TexReg 5040; amended to be effective August 28, 2017, 42 TexReg 3139; amended to be effective August 27, 2018, 43 TexReg 4190; amended to be effective August 1, 2019, 44 TexReg 3802; amended to be effective August 1, 2020, 45 TexReg 4178; amended to be effective August 1, 2022, 47 TexReg 4502; amended to be effective August 1, 2024 49 TexReg 5501; amended to be effective August 1, 2025, 50 TexReg 3569.

§74.13. Endorsements.

- (a) A student shall specify in writing an endorsement the student intends to earn upon entering Grade 9.
- (b) A district shall permit a student to enroll in courses under more than one endorsement before the student's junior year and to choose, at any time, to earn an endorsement other than the endorsement the student previously indicated. This section does not entitle a student to remain enrolled to earn more than 26 credits.
- (c) A student must earn at least 26 credits to earn an endorsement.
- (d) A school district may define advanced courses and determine a coherent sequence of courses for an endorsement area, provided that prerequisites in Chapters 110-117, 127, and 130 of this title are followed.
- (e) To earn an endorsement a student must demonstrate proficiency in the following.
 - (1) The curriculum requirements for the Foundation High School Program as defined by §74.12 of this title (relating to Foundation High School Program).
 - (2) A fourth credit in mathematics that may be selected from one full credit or a combination of two half credits from two different courses, subject to prerequisite requirements, from the following courses:
 - (A) Algebra II;
 - (B) Precalculus;
 - (C) Advanced Quantitative Reasoning;
 - (D) Independent Study in Mathematics;
 - (E) Discrete Mathematics for Problem Solving;
 - (F) Algebraic Reasoning;
 - (G) Statistics;
 - (H) a comparable Advanced Placement (AP) mathematics course that does not count toward another credit required for graduation;
 - (I) AP Computer Science A;
 - (J) International Baccalaureate (IB) Computer Science Higher Level;
 - (K) Engineering Mathematics;
 - (L) Statistics and Business Decision Making;
 - (M) Mathematics for Medical Professionals;
 - (N) Discrete Mathematics for Computer Science;
 - (O) pursuant to the Texas Education Code (TEC), §28.025(b-5), after the successful completion of Algebra II, a mathematics course endorsed by an institution of higher education as a course for which the institution would award course credit or as a prerequisite for a course for which the institution would award course credit. The Texas Education Agency (TEA) shall maintain a current list of courses offered under this subparagraph; and
 - (P) after the successful completion of Algebra I and Geometry, a locally developed mathematics course or other activity, including an apprenticeship or training hours needed to obtain an industry-recognized credential or certificate that is developed pursuant to the TEC, §28.002(g-1).
 - (3) A student may complete a course listed in paragraph (2) of this subsection before or after completing a course listed in §74.12(b)(2)(A) of this title.
 - (4) The fourth mathematics credit may be a college preparatory mathematics course that is developed and offered pursuant to the TEC, §28.014.

- (5) The fourth mathematics credit may be satisfied with one credit of a two-credit IB mathematics course selected from Chapter 111 of this title (relating to Texas Essential Knowledge and Skills for Mathematics) that does not count toward another credit required for graduation.
- (6) An additional credit in science that may be selected from one full credit or a combination of two half credits from two different courses, subject to prerequisite requirements, from the following courses:
 - (A) Chemistry;
 - (B) Physics;
 - (C) Aquatic Science;
 - (D) Astronomy;
 - (E) Earth Systems Science;
 - (F) Environmental Systems;
 - (G) Specialized Topics in Science;
 - (H) a comparable AP science course that does not count toward another credit required for graduation;
 - (I) Advanced Animal Science;
 - (J) Advanced Plant and Soil Science;
 - (K) Anatomy and Physiology;
 - (L) Medical Microbiology;
 - (M) Pathophysiology;
 - (N) Food Science;
 - (O) Forensic Science;
 - (P) Biotechnology I;
 - (Q) Biotechnology II;
 - (R) Physics for Engineering;
 - (S) Scientific Research and Design;
 - (T) Engineering Design and Problem Solving;
 - (U) Engineering Science;
 - (V) pursuant to the TEC, §28.025(b-5), after the successful completion of physics, a science course endorsed by an institution of higher education as a course for which the institution would award course credit or as a prerequisite for a course for which the institution would award course credit. The TEA shall maintain a current list of courses offered under this subparagraph;
 - (W) a locally developed science course or other activity, including an apprenticeship or training hours needed to obtain an industry-recognized credential or certificate that is developed pursuant to the TEC, §28.002(g-1);
 - (X) pursuant to the TEC, §28.025(c-3), a student pursuing an arts and humanities endorsement who has the written permission of the student's parent or a person standing in parental relation to the student may substitute a course that is not being used to satisfy another specific graduation requirement selected from:
 - (i) Chapter 110 of this title (relating to Texas Essential Knowledge and Skills for English Language Arts and Reading);

- (ii) Chapter 113 of this title (relating to Texas Essential Knowledge and Skills for Social Studies);
 - (iii) Chapter 114 of this title (relating to Texas Essential Knowledge and Skills for Languages Other Than English); or
 - (iv) Chapter 117 of this title (relating to Texas Essential Knowledge and Skills for Fine Arts); and
- (Y) credit may not be earned for both physics and Physics for Engineering to satisfy science credit requirements.
- (Z) The fourth science credit may be satisfied with one credit of a two-credit IB science course selected from Chapter 112 of this title (relating to Texas Essential Knowledge and Skills for Science) that does not count toward another credit required for graduation.
- (7) Two additional elective credits that may be selected from the list of courses specified in §74.11(g) or (h) of this title (relating to High School Graduation Requirements).
- (f) A student may earn any of the following endorsements.
 - (1) Science, technology, engineering, and mathematics (STEM). Students who entered high school prior to the 2022-2023 school year may earn a STEM endorsement by completing the requirements specified in subsection (e) of this section, including Algebra II, chemistry, and physics or Physics for Engineering and:
 - (A) a coherent sequence of courses for four or more credits in career and technical education (CTE) that consists of at least two courses in the same career cluster and at least one advanced CTE course. The courses may be selected from Chapter 127 of this title (relating to Texas Essential Knowledge and Skills for Career Development and Career and Technical Education) or CTE innovative courses. The final course in the sequence must be selected from Chapter 127, Subchapter O, of this title (relating to Science, Technology, Engineering, and Mathematics) as it existed prior to August 1, 2025, or Career Preparation I or II (Career Preparation General or Career Preparation for Programs of Study) and Project-Based Research (Career and Technical Education Project-Based Capstone) in Chapter 127, Subchapter B, of this title (relating to High School), if the course addresses a STEM-related field;
 - (B) courses required to complete a TEA-designated program of study related to STEM;
 - (C) three credits in mathematics by successfully completing Algebra II and two additional mathematics courses for which Algebra II is a prerequisite by selecting courses from subsection (e)(2) of this section;
 - (D) four credits in science by successfully completing chemistry, physics, and two additional science courses by selecting courses from subsection (e)(6) of this section; or
 - (E) in addition to Algebra II, chemistry, and physics, a coherent sequence of three additional credits from no more than two of the categories or disciplines represented by subparagraphs (A), (B), (C), and (D) of this paragraph.
 - (2) Business and industry. Students who entered high school prior to the 2022-2023 school year may earn a business and industry endorsement by completing the requirements specified in subsection (e) of this section and:
 - (A) a coherent sequence of courses for four or more credits in CTE that consists of at least two courses in the same career cluster and at least one advanced CTE course. The courses may be selected from Chapter 127 of this title or CTE innovative courses. The final course in the sequence must be selected from one of the following:
 - (i) Chapter 127, Subchapter C, of this title (related to Agriculture, Food, and Natural Resources);

- (ii) Chapter 127, Subchapter D, of this title (relating to Architecture and Construction);
 - (iii) Chapter 127, Subchapter E, of this title (relating to Arts, Audio/Video Technology, and Communications);
 - (iv) Chapter 127, Subchapter F, of this title (relating to Business, Marketing, and Finance);
 - (v) Chapter 127, Subchapter H, of this title (relating to Energy);
 - (vi) Chapter 127, Subchapter K, of this title (relating to Hospitality and Tourism);
 - (vii) Chapter 127, Subchapter M, of this title (relating to Information Technology);
 - (viii) Chapter 127, Subchapter O, of this title (relating to Manufacturing);
 - (ix) Chapter 127, Subchapter P, of this title (relating to Transportation, Distribution, and Logistics); or
 - (x) Career Preparation I or II (Career Preparation General or Career Preparation for Programs of Study) and Project-Based Research (Career and Technical Education Project-Based Capstone) in Chapter 127, Subchapter B, of this title if the course addresses a career from a field listed in clauses (i)-(ix) of this subparagraph;
 - (B) courses required to complete a TEA-designated program of study related to business and industry;
 - (C) four English credits by selecting courses from Chapter 110 of this title to include three levels in one of the following areas:
 - (i) public speaking;
 - (ii) debate;
 - (iii) advanced broadcast journalism;
 - (iv) advanced journalism: newspaper;
 - (v) advanced journalism: yearbook; or
 - (vi) advanced journalism: literary magazine; or
 - (D) a coherent sequence of four credits from subparagraph (A), (B), or (C) of this paragraph.
- (3) Public services. Students who entered high school prior to the 2022-2023 school year may earn a public services endorsement by completing the requirements specified in subsection (e) of this section and:
- (A) a coherent sequence of courses for four or more credits in CTE that consists of at least two courses in the same career cluster and at least one advanced CTE course. The courses may be selected from Chapter 127 of this title or CTE innovative courses. The final course in the sequence must be selected from one of the following:
 - (i) Chapter 127, Subchapter G, of this title (relating to Education and Training);
 - (ii) Chapter 127, Subchapter J, of this title (relating to Health Science);
 - (iii) Chapter 127, Subchapter L, of this title (relating to Human Services);
 - (iv) Chapter 127, Subchapter N, of this title (relating to Law and Public Service); or
 - (v) Career Preparation I or II (Career Preparation General or Career Preparation for Programs of Study) and Project-Based Research (Career and Technical Education Project-Based Capstone) in Chapter 127, Subchapter B, of this title if

- the course addresses a field from a cluster listed in clauses (i)-(iv) of this subparagraph;
- (B) courses required to complete a TEA-designated program of study related to public services; or
 - (C) four courses in Junior Reserve Officer Training Corps (JROTC).
- (4) Arts and humanities. A student may earn an arts and humanities endorsement by completing the requirements specified in subsection (e) of this section and:
- (A) five social studies credits by selecting courses from Chapter 113 of this title; or
 - (B) four levels of the same language in a language other than English by selecting courses in accordance with Chapter 114 of this title, which may include Advanced Language for Career Applications; or
 - (C) two levels of the same language in a language other than English and two levels of a different language in a language other than English by selecting courses in accordance with Chapter 114 of this title; or
 - (D) four levels of American sign language by selecting courses in accordance with Chapter 114 of this title; or
 - (E) a coherent sequence of four credits by selecting courses from one or two categories or disciplines in fine arts from Chapter 117 of this title or innovative courses approved by the commissioner; or
 - (F) four English credits by selecting from the following:
 - (i) English IV; or
 - (ii) Independent Study in English; or
 - (iii) Literary Genres; or
 - (iv) Creative Writing; or
 - (v) Research and Technical Writing; or
 - (vi) Humanities; or
 - (vii) Communication Applications; or
 - (viii) AP English Literature and Composition; or
 - (ix) AP English Language and Composition; or
 - (x) IB Language Studies A: Language and Literature Standard Level; or
 - (xi) IB Language Studies A: Language and Literature Higher Level; or
 - (xii) IB Language Studies A: Literature Standard Level; or
 - (xiii) IB Language Studies A: Literature Higher Level; or
 - (xiv) IB Literature and Performance Standard Level.
- (5) Multidisciplinary studies. A student may earn a multidisciplinary studies endorsement by completing the requirements specified in subsection (e) of this section and:
- (A) four advanced courses that prepare a student to enter the workforce successfully or postsecondary education without remediation from within one endorsement area or among endorsement areas that are not in a coherent sequence; or
 - (B) four credits in each of the four foundation subject areas to include chemistry and/or physics and English IV or a comparable AP or IB English course; or

- (C) four credits in Advanced Placement, International Baccalaureate, or dual credit selected from English, mathematics, science, social studies, economics, languages other than English, or fine arts.
- (6) STEM. Students who entered high school in the 2022-2023 school year or later may earn a STEM endorsement by completing the requirements specified in subsection (e) of this section, including Algebra II, chemistry, and physics or Physics for Engineering and:
 - (A) courses required to be designated a CTE completer in one of the following TEA-approved programs of study related to STEM:
 - (i) biomedical sciences;
 - (ii) civil engineering;
 - (iii) cybersecurity;
 - (iv) electrical engineering;
 - (v) engineering foundations;
 - (vi) geospatial engineering and land surveying;
 - (vii) mechanical and aerospace engineering;
 - (viii) networking systems;
 - (ix) nursing science;
 - (x) programming and software development;
 - (xi) renewable energy;
 - (xii) robotics and automation technology; or
 - (xiii) web development;
 - (B) three credits in mathematics by successfully completing Algebra II and two additional mathematics courses for which Algebra II is a prerequisite by selecting courses from subsection (e)(2) of this section;
 - (C) four credits in science by successfully completing chemistry, physics, and two additional science courses by selecting courses from subsection (e)(6) of this section; or
 - (D) in addition to chemistry, physics, and Algebra II, one additional mathematics course listed in subsection (e)(2) of this section for which Algebra II is a prerequisite and one additional science course listed in subsection (e)(6) of this section.
- (7) Business and industry. Students who entered high school in the 2022-2023 school year or later may earn a business and industry endorsement by completing the requirements specified in subsection (e) of this section and:
 - (A) courses required to be designated a CTE completer in one of the following TEA-approved programs of study related to business and industry:
 - (i) accounting and financial services;
 - (ii) agriculture business, leadership, and communications;
 - (iii) agricultural technology and mechanical systems;
 - (iv) animal science;
 - (v) architectural drafting and design;
 - (vi) automotive and collision repair;
 - (vii) aviation maintenance;

- (viii) aviation pilots;
- (ix) business management;
- (x) carpentry;
- (xi) construction management and inspection;
- (xii) cosmetology;
- (xiii) culinary arts;
- (xiv) diesel and heavy equipment maintenance and commercial drivers;
- (xv) digital communications;
- (xvi) distribution, logistics, and warehousing;
- (xvii) drone (unmanned vehicle);
- (xviii) electrical;
- (xix) entrepreneurship;
- (xx) environmental and natural resources;
- (xxi) food science and technology;
- (xxii) graphic design and interactive media;
- (xxiii) HVAC and sheet metal;
- (xxiv) industrial maintenance;
- (xxv) information technology support and services;
- (xxvi) lodging and resort management;
- (xxvii) manufacturing technology;
- (xxviii) maritime;
- (xxix) marketing and sales;
- (xxx) masonry;
- (xxxi) oil and gas exploration and production;
- (xxxii) plant science;
- (xxxiii) plumbing and pipefitting;
- (xxxiv) printing and imaging;
- (xxxv) real estate;
- (xxxvi) refining and chemical processes;
- (xxxvii) retail management;
- (xxxviii) travel, tourism, and attractions; or
- (xxxix) welding;

(B) courses required to be designated a CTE completer in one of the following TEA-approved programs of study related to business and industry, if the mathematics and science requirements for the STEM endorsement are not met:

- (i) civil engineering;
- (ii) cybersecurity;
- (iii) electrical engineering;

- (iv) engineering foundations;
 - (v) geospatial engineering and land surveying;
 - (vi) mechanical and aerospace engineering;
 - (vii) networking systems;
 - (viii) programming and software development;
 - (ix) renewable energy;
 - (x) robotics and automation technology; or
 - (xi) web development; or
- (C) four English credits by selecting courses from Chapter 110 of this title to include three levels in one of the following areas:
 - (i) public speaking;
 - (ii) debate;
 - (iii) advanced broadcast journalism;
 - (iv) advanced journalism: newspaper;
 - (v) advanced journalism: yearbook; or
 - (vi) advanced journalism: literary magazine.
- (8) Public services. Students who entered high school in the 2022-2023 school year or later may earn a public services endorsement by completing the requirements specified in subsection (e) of this section and:
 - (A) courses required to be designated a CTE completer in one of the following TEA-approved programs of study related to public services:
 - (i) biomedical science, if the mathematics and science requirements for the STEM are not met;
 - (ii) diagnostic and therapeutic services;
 - (iii) early learning;
 - (iv) exercise science, wellness, and restoration;
 - (v) family and community services;
 - (vi) fire science;
 - (vii) government and public administration;
 - (viii) health and wellness;
 - (ix) health informatics;
 - (x) law enforcement;
 - (xi) legal studies;
 - (xii) nursing science, if the mathematics and science requirements for the STEM are not met; or
 - (xiii) teaching and training; or
 - (B) four courses in Junior Reserve Officer Training Corps (JROTC).
- (g) A course completed as part of the set of four courses needed to satisfy an endorsement requirement may also satisfy a requirement under §74.12(b) and (c) of this title and subsection (e)(2), (4), (5), and (6) of this

section, including an elective requirement. The same course may count as part of the set of four courses for more than one endorsement.

Statutory Authority: The provisions of this §74.13 issued under the Texas Education Code, §§7.102(c)(4); 28.002; 28.018; and 28.025.

Source: The provisions of this §74.13 adopted to be effective July 8, 2014, 39 TexReg 5149; amended to be effective August 22, 2016, 41 TexReg 5040; amended to be effective August 28, 2017, 42 TexReg 3139; amended to be effective August 27, 2018, 43 TexReg 4190; amended to be effective August 1, 2019, 44 TexReg 3802; amended to be effective August 1, 2020, 45 TexReg 4178; amended to be effective August 1, 2022, 47 TexReg 4502; amended to be effective August 1, 2024 49 TexReg 5501; amended to be effective August 1, 2025, 50 TexReg 3569.

§74.14. Performance Acknowledgments.

- (a) A student may earn a performance acknowledgment on the student's transcript for outstanding performance in a dual credit course by successfully completing:
 - (1) at least 12 hours of college academic courses, including those taken for dual credit as part of the Texas core curriculum, and advanced technical credit courses, including locally articulated courses, with a grade of the equivalent of 3.0 or higher on a scale of 4.0; or
 - (2) an associate degree while in high school.
- (b) A student may earn a performance acknowledgment on the student's transcript for outstanding performance in bilingualism and biliteracy as follows.
 - (1) A student may earn a performance acknowledgment by demonstrating proficiency in accordance with local school district grading policy in two or more languages by:
 - (A) completing all English language arts requirements and maintaining a minimum grade point average (GPA) of the equivalent of 80 on a scale of 100; and
 - (B) satisfying one of the following:
 - (i) completion of a minimum of three credits in the same language in a language other than English with a minimum GPA of the equivalent of 80 on a scale of 100; or
 - (ii) demonstrated proficiency in the Texas Essential Knowledge and Skills for Level IV or higher in a language other than English with a minimum GPA of the equivalent of 80 on a scale of 100; or
 - (iii) completion of at least three credits in foundation subject area courses in a language other than English with a minimum GPA of 80 on a scale of 100; or
 - (iv) demonstrated proficiency in one or more languages other than English through one of the following methods:
 - (I) a score of 3 or higher on a College Board Advanced Placement examination for a language other than English; or
 - (II) a score of 4 or higher on an International Baccalaureate examination for a higher-level languages other than English course; or
 - (III) performance on a national assessment of language proficiency in a language other than English of at least Intermediate High or its equivalent.
 - (2) In addition to meeting the requirements of paragraph (1) of this subsection, to earn a performance acknowledgment in bilingualism and biliteracy, an emergent bilingual student must also have:
 - (A) participated in and met the exit criteria for a bilingual or English as a second language (ESL) program; and
 - (B) scored at the Advanced High level on the Texas English Language Proficiency Assessment System (TELPAS).
- (c) A student may earn a performance acknowledgment on the student's transcript for outstanding performance on a College Board Advanced Placement test or International Baccalaureate examination by earning:
 - (1) a score of 3 or above on a College Board Advanced Placement examination; or
 - (2) a score of 4 or above on an International Baccalaureate examination.
- (d) A student may earn a performance acknowledgment on the student's transcript for outstanding performance on an established, valid, reliable, and nationally norm-referenced preliminary college preparation assessment instrument used to measure a student's progress toward readiness for college and the workplace

or on an established valid, reliable, and nationally norm-referenced assessment instrument used by colleges and universities as part of their undergraduate admissions process by:

- (1) earning a score on the Preliminary SAT/National Merit Scholarship Qualifying Test (PSAT/NMSQT®) that qualifies the student for recognition as a commended scholar or higher by the National Merit Scholarship Corporation or as an awardee of the National Recognition Programs of the College Board;
 - (2) earning a composite score of 442 on the ACT Aspire™ examination;
 - (3) earning a composite score of 29 on the ACT PreACT® examination;
 - (4) earning a total score of at least 1350 on the SAT®; or
 - (5) earning a composite score on the ACT® examination of 29 (excluding the writing subscore).
- (e) A student may earn a performance acknowledgment on the student's transcript for earning a state-recognized or nationally or internationally recognized business or industry certification or license as follows.
- (1) A student may earn a performance acknowledgment with:
 - (A) performance on an examination or series of examinations sufficient to obtain a nationally or internationally recognized business or industry certification; or
 - (B) performance on an examination sufficient to obtain a government-required credential to practice a profession.
 - (2) Nationally or internationally recognized business or industry certification shall be defined as an industry-validated credential that complies with knowledge and skills standards promulgated by a nationally or internationally recognized business, industry, professional, or government entity representing a particular profession or occupation that is issued by or endorsed by:
 - (A) a national or international business, industry, or professional organization;
 - (B) a state agency or other government entity; or
 - (C) a state-based industry association.
 - (3) Certifications or licensures for performance acknowledgements shall:
 - (A) be age appropriate for high school students;
 - (B) represent a student's substantial course of study and/or end-of-program knowledge and skills;
 - (C) include an industry-recognized examination or series of examinations, an industry-validated skill test, or demonstrated proficiency through documented, supervised field experience; and
 - (D) represent substantial knowledge and multiple skills needed for successful entry into a high-skill occupation.

Statutory Authority: The provisions of this §74.14 issued under the Texas Education Code, §§7.102(c)(4); 28.002; 28.018; and 28.025.

Source: The provisions of this §74.14 adopted to be effective July 8, 2014, 39 TexReg 5149; amended to be effective August 22, 2016, 41 TexReg 5040; amended to be effective August 27, 2018, 43 TexReg 4190; amended to be effective August 1, 2022, 47 TexReg 4502.



Attachment 3 — Student Discipline Policy

Challenge Early College High School (CECHS)

I. Purpose and Philosophy

Challenge Early College High School (CECHS) is committed to maintaining a safe, orderly, and respectful learning environment that supports high academic expectations, college readiness, and student well-being. As an Early College High School located on the Houston City College (HCC) campus, CECHS emphasizes responsibility, professionalism, and mutual respect among students, staff, and families.

CECHS believes that discipline is instructional, not punitive. Our primary goal is to keep students in school and engaged in learning, especially given the rigor of advanced coursework and college-level expectations. Suspension or removal from instruction is not the default response and is used only when student behavior significantly disrupts learning or poses a safety concern to the individual or others.

II. Alignment to HISD and State Requirements

CECHS operates in full alignment with:

- Houston ISD Student Code of Conduct
- HISD Board Policy FOC (Disciplinary Alternative Education Program – DAEP)
- HISD Board Policy FOD (Expulsions)
- HISD Discipline Matrix
- Texas Education Code and TEA guidance

All disciplinary actions respect student due process rights, comply with state and federal law, and are implemented consistently and equitably.

III. Positive School Culture and Preventative Practices

CECHS maintains very low disciplinary incidents, as reflected in recent TEA accountability and campus report card data, due to a strong, proactive school culture grounded in:

- High expectations and strong relationships
- Consistent routines and clear behavioral norms
- Frequent adult monitoring and student support
- Emphasis on academic professionalism aligned to college expectations

Preventative strategies include:

- Explicit teaching of behavioral expectations from the first day of school
- Use of restorative conversations and problem-solving approaches
- Strong AVID advisory and mentoring structures
- Regular attendance, grade, and behavior monitoring
- Early family communication and engagement

IV. Progressive Discipline Framework

CECHS follows a progressive discipline model, using the least restrictive intervention necessary to correct behavior and restore learning. Strategies may include:

- Verbal redirection and re-teaching expectations
- Restorative conferences and reflection
- Parent communication and collaboration
- Behavior contracts or support plans
- Loss of privileges aligned to the behavior
- Counseling or mentoring support
- After-school or Saturday interventions

Suspension, DAEP placement, or expulsion is considered only when required by law or when other interventions have been exhausted, and always in accordance with HISD and TEA guidelines.

V. Special Considerations and Student Rights

CECHS ensures that discipline practices:

- Are non-discriminatory
- Consider the needs of students receiving special education, 504 services, or Emergent Bilingual supports
- Follow all procedural safeguards under IDEA, Section 504, and state law
- Include parent notification and the opportunity for student voice

Students with disabilities are disciplined in accordance with their Individualized Education Plans (IEPs) or 504 Plans, including manifestation determination reviews when applicable.

VI. Collaboration with Families and Institutions

Because CECHS students are simultaneously Houston ISD students and Houston City College students, students are expected to follow:

- CECHS Student Code of Conduct
- HISD policies
- HCC Student Code of Conduct

Families and students sign acknowledgment agreements outlining expectations, responsibilities, and consequences. Discipline decisions consider the unique shared-campus environment and emphasize accountability, safety, and continued access to instruction.

VII. Monitoring and Continuous Improvement

Discipline data is reviewed regularly by campus leadership to:

- Identify trends or disproportionality
- Adjust preventative strategies
- Strengthen supports for students
- Maintain a positive and inclusive campus climate

CECHS remains committed to a discipline approach that is fair, restorative, legally sound, and centered on student success.

Challenge Early College High School's discipline policy promotes a safe, orderly, and academically focused environment while respecting student rights and emphasizing restorative practices. By prioritizing prevention, positive relationships, and keeping students engaged in learning, CECHS sustains a strong school culture with minimal disciplinary removals—supporting both high academic achievement and college readiness.

Challenge Early College High School

Organizational Structure

Position	Reports To
Principal – Jose R. Santos	Board – Friends of Challenge Early College HS
Assistant Principal – Tracy B. Celestine	Principal
Assistant Principal – Christopher W. Saikin	Principal
Assistant Principal – Preeti Joseph	Principal
Counselor – Sara G. Boston	Principal
Magnet Coordinator – Laura O. Del Rio	Principal
AVID Teacher – Sandra Barron	Principal
Teachers (Core, AP, Dual Credit, UT OnRamps)	Assistant Principals
Support Staff / Clerical	Principal

Bylaws of Friends of Challenge Early College High School

Incorporated in: State of Texas

Type: Nonprofit Public Benefit Corporation (501(c)(3))

Article I – Name and Purpose

Section 1. Name

The name of this organization shall be **Friends of Challenge Early College High School**.

Section 2. Purpose

The Organization is organized exclusively for charitable and educational purposes under Section 501(c)(3) of the Internal Revenue Code.

The purpose of the Organization is to:

- Support and sustain the mission, vision, and programs of **Challenge Early College High School (CECHS) TEA # 101-912-323**;
- Collaborate with the Principal/CEO, faculty, families, and community partners to enhance student learning, teacher support, and school culture;
- Raise and manage funds to support academic initiatives, campus improvements, celebrations, and community partnerships;
- Ensure that CECHS continues to thrive as a **high-performing, innovative public school** under the Houston Independent School District (HISD) and SB 1882 partnership framework.

Article II – Membership

Section 1. Eligibility

Membership in the Organization shall be open to individuals and entities who support the mission and objectives of CECHS, including parents, alumni, teachers, staff, community members, and business partners.

Section 2. Voting Members

Voting rights shall be reserved for members of the **Board of Directors**.

Article III – Board of Directors

Section 1. General Powers

The Board of Directors shall manage the affairs, funds, and property of the Organization. It shall determine policies, approve budgets, and ensure that the Organization's activities align with its mission and legal obligations.

Section 2. Number and Composition

The Board shall consist of **no fewer than three (3)** and **no more than seven (7)** voting members.

The Board may include:

- Parent and community representatives
- CECHS faculty or staff
- Alumni representatives

- Houston City College or business partners
- The CECHS Principal/CEO (non-voting member)

Section 3. Officers

The officers of the Board shall include:

1. **President (Chair)**
2. **Development / Fundraising Chair**
3. **Secretary**
4. **Treasurer**
5. **Additional Officers** as determined by the Board (e.g., **Community Partnerships Chair, Parent Liaison, or Communications / Marketing Chair**).

Section 4. Duties of Officers

- **President (Chair):** Leads the Board, presides over meetings, represents the Organization publicly, and works closely with the CECHS Principal/CEO to ensure alignment with the school's mission and goals.
- **Development / Fundraising Chair:** Oversees fundraising initiatives, donor relations, and grant opportunities to secure resources that support the school's programs, events, and long-term sustainability.
- **Secretary:** Maintains accurate records of meetings, prepares agendas and minutes, manages organizational documentation, and ensures compliance with reporting and recordkeeping requirements.
- **Treasurer:** Oversees all financial activities, including budgeting, accounting, and financial reporting; ensures fiscal responsibility and transparency; and works with any contracted financial professionals or fiscal agents.
- **Principal / CEO (Non-Voting):** Serves as the liaison between the Organization and Challenge Early College High School, ensuring decisions and initiatives align with the school's mission, priorities, and student success goals.
- **Community Partnerships Chair:** Builds and maintains relationships with Houston City College, Grow+On, University of Houston, local businesses, and community organizations to create opportunities that benefit CECHS students and staff.
- **Parent Liaison:** Represents the parent community, fosters communication between families and the Board, and supports parent engagement in fundraising, events, and school initiatives.
- **Communications / Marketing Chair:** Manages the Organization's public communication, including newsletters, social media, and promotional materials; ensures consistent messaging that reflects the mission and achievements of CECHS.

Section 5. Terms

Directors shall serve **two-year terms** and may be re-elected. Terms should be staggered to ensure continuity of leadership.

Section 6. Meetings

The Board shall meet at least **quarterly**, with additional meetings scheduled as needed.

- **Quorum:** A simple majority of voting members constitutes a quorum.
- **Voting:** Each voting member has one vote; proxy voting is not permitted.
- **Notice:** Written notice of each meeting shall be provided at least seven (7) days in advance.

Section 7. Committees

The Board may establish standing or ad hoc committees to carry out specific tasks, such as:

- Fundraising & Development
- Governance
- Finance
- Community Partnerships
- Programs & Events

Article IV – Conflict of Interest

Board members must act in the best interests of the Organization.

Any potential conflict of interest must be disclosed, and the affected individual shall abstain from voting on related matters.

Article V – Financial Administration

- The fiscal year shall align with the school year: **July 1 – June 30.**
- All funds shall be used to advance the Organization's stated mission.
- The Treasurer shall prepare an **annual financial report** and ensure compliance with IRS Form 990 reporting requirements.
- No part of the Organization's net earnings shall benefit any private individual.

Article VI – Amendments

These Bylaws may be amended by a **two-thirds (2/3)** vote of the Board of Directors, provided written notice of the proposed amendment has been distributed at least seven (7) days prior to the vote.

Article VII – Dissolution

Upon dissolution of the Organization, all assets shall be distributed to **Challenge Early College High School** or another nonprofit educational organization consistent with the Organization's mission and compliant with IRS 501(c)(3) requirements.

Code of Ethics

All Board members and officers of FCECHS shall adhere to the following principles:

1. **Duty of Care** – Act in good faith and with reasonable diligence.
2. **Duty of Loyalty** – Place the interests of CECHS above personal or professional interests.
3. **Duty of Obedience** – Ensure compliance with applicable laws, TEA requirements, and organizational policies.
4. **Integrity & Transparency** – Conduct business openly and honestly.
5. **Equity & Student-Centered Decision Making** – Advance policies that support equitable access, academic excellence, and student success.

Violations of this Code may result in corrective action, including removal from the Board.

Conflict of Interest Policy

Purpose

To protect FCECHS from conflicts that could compromise decision-making, integrity, or public trust.

Definition

A conflict exists when a Board member has a financial, professional, or personal interest that could improperly influence decision-making.

Procedures

- All Board members must disclose actual or potential conflicts annually and as they arise.
- A conflicted member must recuse themselves from discussion and voting.
- Disclosures and recusals shall be documented in meeting minutes.

Failure to disclose conflicts may result in removal from the Board.

Statement of Assurances

(To Be Signed Annually by Each Board Member)

I, _____, affirm that:

1. I have read and agree to comply with the Bylaws, Code of Ethics, and Conflict of Interest Policy of Friends of Challenge Early College High School.
2. I will act in the best interests of CECHS and its students.
3. I will disclose any actual or perceived conflicts of interest immediately.
4. I understand that governance authority rests with the Board and not with the authorizer.
5. I will uphold TEA, 1882 partnership, and CCRSM expectations.

Signature: _____

Date: _____

Attachment 6_Information Sheet – Friends of Challenge Early College HS

President

Dr. Anne McClellan’s depth of experience, institutional knowledge, and longstanding commitment to Challenge Early College High School make her an exceptional fit to serve as President of the Friends of Challenge Early College High School in partnership with the Principal/Superintendent under the 1882 model. As the founder of Challenge Early College High School and a nationally recognized leader in early college and college-readiness reform, Dr. McClellan brings unparalleled expertise in governance, program design, community engagement, and outcomes-based accountability aligned to TEA’s College and Career Readiness School Model. Her career spans executive leadership in higher education, statewide policy initiatives, and large-scale school improvement efforts, including securing and managing significant public and private funding to expand access and equity for historically underserved students. In this role, Dr. McClellan’s collaborative leadership style, deep understanding of early college partnerships, and ability to bridge K–12, higher education, and community stakeholders position her to work seamlessly with the Principal/Superintendent to strengthen strategic oversight, sustain Distinguished Early College High School outcomes, and advance the long-term mission and vision of the 1882 partnership for Challenge Early College High School.

Secretary

Dr. Michael Webster’s extensive experience in higher education leadership, governance, and cross-sector collaboration makes him an excellent fit to serve as Secretary for the Friends of Challenge Early College High School in support of the 1882 partnership. As President of HCC Southwest, Dr. Webster brings deep expertise in dual credit, early college pathways, workforce alignment, and institutional accountability—all of which are central to the mission and success of Challenge ECHS. His background in policy implementation, documentation, compliance, and strategic planning positions him well to support board governance functions, ensure clear records and communication, and strengthen alignment between the school, higher education partners, and community stakeholders. Working closely with the Principal/Superintendent, Dr. Webster’s leadership and systems-level perspective will help ensure transparency, fidelity to the 1882 governance model, and sustained focus on student outcomes and college readiness.

Treasurer

Mr. Justin G. Fuentes, M.Ed., is an excellent fit to serve as Secretary for Friends of Challenge Early College High School because his background combines deep knowledge

of the CECHS early-college model with high-level experience in governance, compliance, and systems leadership, exactly what is needed to support an SB 1882 partnership. As a former CECHS principal, he understands the rigor, operational demands, and accountability expectations required to sustain student success in advanced coursework and dual credit pathways. His district leadership as Houston ISD's Executive Director for School Choice strengthened his expertise in policy implementation, transparent processes, and compliance expectations that directly support board governance functions. In his current role as Chief of Schools/Operations for a Tejano Center campus, he leads performance monitoring, operational execution, and leader support; skills that translate well to maintaining accurate board records, ensuring timely compliance documentation, and supporting the Principal/Superintendent with governance processes, meeting agendas/minutes, and follow-through on SB 1882 contract commitments.

Resumes included

Anne McClellan

LEADERSHIP EXPERIENCE

McClellan Collective Executive, LLC, President, and McClellan Educational Coaching and Consulting - Sole Proprietor, Owner. (2007-current)

Director of Innovation & Research, Research Professor, and Executive Director of Advancing Community Education and Service Institute (ACES Institute), University of Houston, College of Education, Houston, Texas. (2012 - Current) Significant project funding, design, and launch include Advancing Community Engagement and Service Institute and programming, Third Ward Community Schools Partnership, TEACH2Lead, HISD Teach Forward Houston, and KIPP National Principal Preparation Program.

Director of Education – Middle School Matters George W. Bush Institute, Dallas, Texas. (2011-2012) Led and funded the design of the Middle School Matters program and managed research contributions from 15 university-based expert researchers.

Vice President & Chief Growth Officer, YES Prep Public Schools, Houston, Texas. (2008-2011) Led strategic planning and school expansion campaign resulting in five new schools with growth funding for \$10M from the Laura and John Arnold Foundation, \$6.8 from the Charter School Growth Fund, \$22.1 in low-cost debt: QZAB, QSCB Bonds, and initiated New Market Tax Credits funding. Secured and recycled existing commercial buildings for repurpose and school expansion, and initiated a policy effort to provide charters access to the Texas Permanent School Fund.

T-STEM Program Officer – Texas High School Project, Communities Foundation of Texas, Dallas, Texas. (2005-2008) Led school design and Texas Education Agency funding for 35 Texas Science, Technology, Engineering, and Mathematics (STEM) academies and four STEM Early College High Schools (STEM-ECHS); established and funded a statewide STEM coaching program; and managed a \$47M grant funding new STEM schools across Texas. Principal

Academy Master Coach – A+ Challenge (1999-2005)

Founder & Principal – Challenge Early College High School (ECHS), Houston Independent School District (HISD), Houston, Texas. (2003-2005) Funded and developed the first Early College in the State of Texas, and one of the first four in the nation; served as the Texas Education Agency Early College High School Demonstration Site; contributed to State policy on early college as an early innovator; and expanded the dual credit program in HISD and Texas.

Founding Program Officer – Center for the Reform of School Systems, Houston, Texas. (2000-2003)

Principal, Edgar Allan Poe Elementary, HISD, Houston, Texas. (1990-2000)

Assistant Principal - Robert E. Lee Senior High School, HISD, Houston, Texas. (1987-2000)

Classroom Leader, HISD, Houston, Texas. (1979-1987)

EDUCATION

- | | |
|-------------------------|--|
| – University of Houston | Ed.D., Educational Leadership and Cultural Studies |
| – University of Houston | M.Ed., Educational Administration |
| – Buffalo State College | B.S., Education |
| – Syracuse University | Advertising, Design, and Communications |

Anne McClellan

AWARDS AND HONORS

- Harvard University McLean Medical School Institute of Coaching - Fellow, 2018 - current
- Houston Women's Magazine 50 Influential Women, 2018
- American Leadership Forum Senior Fellow, 2015 - Current.
- University of Houston Outstanding Alumni Award, 2006
- Houston Independent School District Master Principal, 2003 -2005
- E.E. and Myrtle Oberholtzer Outstanding UH Graduate Student Award, 1996
- George and Josephine Hamman Foundation HISD Outstanding Educator Award, 1989

COMMUNITY SERVICE

- 2025 - Current, Barbara Bush Houston Literacy Foundation Ladies Guild, Executive Board
- 2017 - Current, American Leadership Forum Board of Trustees- Houston, Texas.
- 2013- Current, A+ Unlimited Charter School Board of Trustees, Board Chair.
- 2017 - 2019, Regional Education Laboratory/ American Institute for Research, Educator
- Effectiveness Alliance Member
- 2015 - 2018, Good Works Houston, Board Member - Houston, Texas.

SELECTED FUNDED PROJECTS

- McClellan, A. (2020). \$1,000,000 Federal Comprehensive Center-Westat grant subcontract.
- McClellan, A. and Aguirre-Munoz, Z. (2020). Barbara Bush Literacy Foundation: \$300,000, Reading Round Up program development, implementation and evaluation.
- McClellan, A. (2019). AmeriCorps Cougar Reading Tutors: \$273,000, year 3
- McClellan, A. and Schwartz, J. (2018). AmeriCorps Cougar Reading Tutors: \$284,000, year 2.
- McClellan, A. and Thompson, A. (2018) Raise Your Hand Texas Grant: \$5,000,000 for ten years of teacher scholarships.
- McClellan, A., (2017-20). Powell Foundation Third Ward Ace Teacher Project, \$150,000.
- McClellan, A. and Schwartz, J. (2017). AmeriCorps Cougar Reading Tutors and Teacher Corps: \$272,000, a three-year renewable term.
- Schwartz, J. and McClellan, A. (2017). Advancing Community Engagement (ACE) Institute university building match: \$1,500,000.
- Schwartz, J. and McClellan, A. (2017) Advancing Community Engagement (ACE) Institute, University of Houston, Chancellor's start-up funding and fundraising match: \$675,000.
- McClellan, A., (2016-19). Barbara Bush Literacy Foundation Third Ward Cougars Literacy Tutors Project, \$120,000.
- Schwartz, J. and McClellan, A., (2016) US Department of Commerce Third Ward Partnership building: \$1,300,000.
- McClellan, A. (2015). Barbara Bush Literacy Foundation Read Houston Read Tutor Evaluation, \$25,000.
- McClellan, A. and Horn, C. (2015). Sid Richardson Foundation College of Education Innovation, \$200,000.
- McPherson, R. Turchi, L., Chauvot, J. and McClellan, A. (2015). Bill and Melinda Gates Foundation Grant: USPREP Teacher Transformation Center-Texas Tech University, \$734,000.
- McClellan, A., (2014). Sid Richardson Foundation College of Education Innovation, \$100,000.
- McClellan, A., (2013). Powell Foundation TEACH2Lead Coaching Program development, \$75,000.
- McClellan, A. (2013). Brown Foundation: TEACH2Lead Coaching Program development, \$250,000.

Anne McClellan

- McClellan, A. (2012). Sid Richardson Foundation: George W. Bush Foundation – Middle School Matters program expansion, \$4,200,000.
- McClellan, A. & Briggs, K. (2011). Meadows Foundation for George W. Bush Foundation – Middle School Matters program development, \$1,000,000.
- McClellan, A. (2009) Charter School Growth Fund – YES Prep Public Schools Expansion, \$6,900,000.
- Dolibios, R. and McClellan, A. (2008) Arnold Foundation – YES Prep Public Schools Expansion, \$10,000,000.
- Dolibios, R. and McClellan, A. (2008) Brown Foundation – YES Prep Public Schools Expansion, \$5,000,000.
- McClellan, A. (2006). Texas Education Agency Early College Demonstration Site, \$250,000.
- McClellan, A. (2005). Houston A+ Challenge Lamplighter Grant Award (2006): Challenge ECHS Startup funds, \$150,000.
- McClellan, A. (2005). Department of Education & Texas Education Agency Charter School Startup Grant (2005): Challenge ECHS, \$650,000.
- McClellan, A., Williams, N., & Aligo, J. (1999). Texas Education Agency – Early Reading Initiative Model School for Effective Interventions Programs, \$627,000.

PROFESSIONAL EXPERIENCE

President, HCC Southwest

2024-Present: Houston City College System

HCC is the fifth largest community college in the nation with over 95,000 enrolled students comprised of 38% Hispanic, 28% African American, 14.5% White, 12.5% Asian, and 7% Other. With seven colleges operating 20 campuses located throughout the Houston region and an annual unrestricted budget near \$500 million, over 5,200 faculty and staff members provide world-class training in more than 100 fields of study.

As HCC Southwest President, I oversee the four-campus college in the southwest footprint of the service area where 26,000 students are served annually. As part of my functions, I provide oversight and management to the college's instructional services, student services, operations and administration and communications. The localized budget of HCC Southwest is \$17.5million with an annual employee FTE of 650. Some recent highlights include the following:

- Increased enrollment by 8% in 2024-2025 and on track to increase 2025-2026 by 6%
- Secured the following grants:
 - \$2 million from Google.org
 - \$800,000 from Apple
 - \$250,000 from anonymous foundation to install childcare facilities
 - \$100,000 from Trehan Family Foundation
- Latino Learning Center Humanitarian Award Recipient, 2025

Associate Vice Chancellor, Workforce Instruction

2017-2024: Houston City College System

In my role as AVC, Workforce Instruction, I provided leadership and strategic direction within the college's workforce programming and instruction including the management of the credit, non-credit, contract training and dual credit workforce programs. Some key accomplishments and experience while serving in this role include:

- Established the Office of Work-Based Learning and Industry Partnerships in 2022 to expand apprenticeships in non-traditional sectors through the "Gulf Coast Region Apprenticeship Hub." To date, 37 new registered apprenticeships have been launched.
 - **NCWE Exemplary Program Award, 2023**
- Partnered with large, regional furniture retailer, Gallery Furniture, to stand up a dual credit, charter school and workforce training center at the retail location
 - **League of Innovation Winner, 2022**
- Established dual-credit, pre-apprenticeships with regional ISDs and employer partners:
 - **NCWE Award Winning Program, 2019**
- Led the transformation and reorganization of HCC's Workforce Instruction Division including resource allocation, staffing and instructional programming in credit and non- credit programs, corrections education, apprenticeships, teacher education and dual credit
- Appointed by Lt. Governor to state's Industry-Based Certification Advisory Council
- Established a partnership with the Harris County Community Supervision and Corrections Department to offer HCC Workforce Training at the regional probation offices
- In partnership with the Harris County Sheriff's Office, developed vocational training for the Women's Empowerment Center, a county jail facility
- Developed the Fast Track Training Campaign in response to the Covid-19 pandemic that has generated 8000 leads since 2021

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- Generated grant/donation revenue totaling \$10.8 million last year
- Established employer partnerships to drive training offerings in construction, petrochemical, professional services, and energy sectors

Director, Regional Workforce Development

2016-2017: Greater Houston Partnership

The Greater Houston Partnership is the Chamber of Commerce and Economic Development Agency for the greater Houston region. Membership includes over 900 companies from the 12-county region including over 20 Fortune 500 companies.

As Director of Regional Workforce Development, I facilitated the collaborative effort of employers to build a robust pipeline of talent with technical and employability skills to meet the regional workforce demand. Key experiences include the following:

- Assisted in the development and implementation of the effort's strategy to create sectorchanging solutions to the talent supply chain
- Facilitated collective impact efforts of collaborative, industry councils
- Developed business partnerships and maintain external relations
- Delivered professional development and training
- Provided technical assistance to community-based organizations, local employers, higher education institutions and regional ISDs

Assistant Superintendent, Career Readiness

2012-2016: Houston Independent School District

HISD is the eighth largest school district in the nation with almost 200,000 students attending 274 schools. Total staffing for the district is 27,040 within an operating budget of \$2.1 billion.

As Assistant Superintendent of Career Readiness, I led strategic initiatives for the district's career readiness programming including oversight of the Career and Technical Education program, K-8 Career Readiness efforts and a programmatic budget in excess of \$35 million.

Some key accomplishments in this role include:

- Increasing CTE enrollment from 12,000 students to 27,000 students
- Increased industry certificates awarded from 800 to 3300
- Developed and implemented 5-year strategic plan for district CTE programming
- Created District "Chamber of Commerce" comprised of business partners
- Implemented innovative dual-credit AAS degree career programs
- Established essential processes for funding and compliance

Industry Liaison, Education

2010-2012: Gulf Coast Workforce Board

The Gulf Coast Workforce Board is the largest workforce board in the State of Texas serving the 13-county region. Annually, the board facilitates services to over 250,000 clients and employers through a budget totally over \$400 million.

As Industry Liaison, I developed and supported strategic relationships between local industry, community organizations and school systems to increase the quality and quantity of the local workforce through the following activities:

- Developed external relationships and business partnerships
- Designed programming related to workforce development as relevant to district needs

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- Created instructional materials for internal and external training providers
- Liaised with workforce system staff, industry account executives, and chamber of commerce/economic development representatives to organize industry-based initiatives to meet employers' workforce needs
- Used statistical and qualitative labor market information to support industry-based efforts to identify and verify critical labor shortages
- Maintained database for outreach among key industry, community and district stakeholders

Program Coordinator

2006 - 2010: Houston A+ Challenge, formerly Houston Annenberg Challenge, Houston, Texas

As program coordinator at this educational nonprofit organization, I managed a \$97 million portfolio of grant projects connecting businesses, community organizations and school districts for educational nonprofit organization. I had the opportunity to develop key leadership skills and knowledge through the following experiences:

- Developed and led aspiring principal leadership academy
- Developed learning strategies and instructional programming for school districts including fine arts integration, elementary math and science pedagogy, and secondary literacy
- Served as liaison between school districts and community and business partners
- Designed and implemented instructional coaching program for local school districts
- Provided direct training and coaching to customers (school district personnel) through a variety of instructional methodologies
- Conducted periodic evaluation of programming to assess quality and performance
- Coordinated and presented at large scale events
- Developed grant proposals

Instructional Coach

2003- 2006: HISD—Heights High School, Houston, Texas

In this role, I provided learning and professional development programming including coaching instructors, team building, curriculum and instruction development and presentations to large groups, and generated proposals for local and national grants and respond to RFPs

- Managed budgets related to programming
- Conducted evaluation and assessments

Adjunct Professor, English

2006 - 2007: University of Houston, Downtown, Houston, Texas

English Language Arts/Journalism Instructor

2000 - 2006: HISD—Reagan High School, Houston, Texas

- Produced award winning and profit-making student newspaper three years in a row
- Nominated two years in a row as teacher of the year

English Language Arts/Journalism Instructor

1999 - 2000: St. Pius X High School, Houston, Texas

EDUCATION

Lamar University, Beaumont, Texas, Superintendent Certificate, May 2021

University of Houston, Houston, Texas, PhD, English, May 2018

University of Houston, Houston, Texas, M.A., English, May 2005

University of Texas at Austin, Austin, Texas, B.A., English, May 1999
Kingwood College, Lone Star College System

CERTIFICATIONS

Texas Superintendent (EC-12)
Texas Secondary Teacher (6-12), English
US Chamber of Commerce Talent Pipeline Management

COLLEGE SERVICE

- Workforce Advisory Committee Member, Greater Houston United Way
- Executive Committee Member, Upskill Houston/Greater Houston Partnership
- Member, East Harris County Manufacturing Association Workforce Committee
- Vice Chair, SER Jobs For Progress Training Advisory Committee
- Board Member, Community College Petrochemical Initiative

STATE AND NATIONAL SERVICE

- Appointed Member, State of Texas Industry-Based Certification Advisory Council
- Member, National Council for Workforce Education Business Partnership Committee

COMMUNITY SERVICE

- Board Member, Gulf Coast Workforce Board
- Senior Fellow-Education Class 4, American Leadership Forum Houston
- Board Member, Center for Recycled Art
- Board Member, Education Pioneers Houston, 2010-2012
- Member, Fulshear-Katy Chamber of Commerce Education and Workforce Committee
- Fellow, Center for Houston's Future Leadership Forum
- National Facilitator, National School Reform Faculty

SELECTED PRESENTATIONS

"Responding to the Pandemic Job Loss through Microcredentials," Texas Higher Education Coordinating Board Microcredential Learning Network, Summer 2023

"Utilizing VR as a Platform Across Disciplines," AACC Annual Conference, Denver, CO, Spring 2023

"Technology of Today and Tomorrow: Amazon Lunch and Learn @ AfroTech," Panel Participant, Austin, TX, Fall 2023

"Partnerships that Work: Houston Community College @ Gallery Furniture Retail Center," National Council for Workforce Education, Portland, OR, Fall 2022

"Regional Workforce Trends Influencing Talent Pipeline," CenterPoint Energy School District Consortium Seminar, Spring 2022

"Connecting Careers to the Classroom," Texas Association of School Administrators, Dallas, TX, Fall 2021

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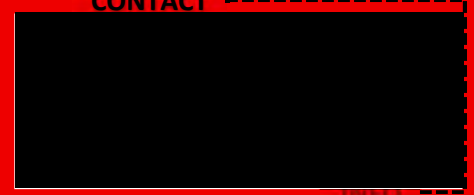
“An Introduction to Work-based Learning and Apprenticeships,” AWS Tech Skills Roundtable, Houston, TX, Fall 2021

“Regional Workforce Development Effective Practices,” West Houston Chamber of Commerce Government Affairs Quarterly Meeting, Houston, TX, Spring 2021

“Effective Workforce Development: Trio Electric Pre-Apprenticeship Partnership,” National Council for Workforce Education, San Antonio, TX, Fall 2019

JUSTIN G. FUENTES

CONTACT



INFO

EDUCATION

- M.Ed. The University of Houston (2003)
Master's in Education Administration
- B.S. The University of Houston (1999)
Bachelor of Science -Mathematics/Minor: Secondary Education

CERTIFICATIONS

- Superintendent
- Principal
- Secondary Mathematics

PROFESSIONAL DEVELOPMENT

- HARVARD UNIVERSITY
Data Driven Instruction – This development program is designed to support district leaders in coaching Principals and Professional Learning Communities toward the utilization of student data and communication methods ensuring the appropriate use and manipulation of curriculum and pedagogical practices to increase student achievement.
- RICE UNIVERSITY JESSE H. JONES GRADUATE SCHOOL OF BUSINESS
Strategic Marketing Management - An accelerated professional development program that provides a business strategy that aligns both human capital and financial resources, to better support academic consistency and proficiency.

PROFESSIONAL HIGHLIGHTS

28 – Years in Education

23 – Years in District Leadership Roles

11 – Years as High-Level Cabinet Member

8 – Years as Principal

- Utilized \$19 million to create STEM programs in schools, specifically through partnerships with Baylor College of Medicine and NASA.
- Coordination and oversight of 128 Magnet programs in 119 campuses, 29 other transfer types, 3,600 different transfer options spanning 287 campuses, and the functioning of an office with 35 employees.
- Wrote and awarded \$12 million ESSER Enrollment Funding, \$15 million TTIPS grant for School Improvement, and \$5 million Texas Early College Initiative's Model School

AS PRINCIPAL:

- Challenge ECHS earned the coveted “National Blue-Ribbon School” status, 2010
- Sterling HS achieved “Met Standard” every year, 2015-2018, after three years below state academic standard
- Challenge ECHS earned a total of 41 Gold Performance Acknowledgements in 5yr.span, 2006-2011
- Sterling HS achieved a total of 5 TEA Campus Level Distinctions in three years
- Challenge ECHS achieved “Exemplary” three times, 2009, 2010, & 2011
- Challenge ECHS achieved “Recognized” twice, 2007 & 2008
- Challenge ECHS was the first Early College in Texas; 1 of 11 in the nation when it was created; it served TEA's Model School for the Texas Early College Initiative in coordination with Jobs For the Future while implementing a school-wide focus using the Common Instructional Framework to drive high level instruction.
- Never had a campus fall below state academic standard (TAKS & STAAR)

SUMMARY OF PROFESSIONAL WORK EXPERIENCE (circa 2006)

Chief of Schools/Chief of Operations	Raul Yzaguirre School for Success	2023 - Present
Assistant Superintendent/Executive Director (School Choice)	Houston ISD	2018 – 2023
High School Principal (Sterling HS)	Houston ISD	2015 – 2018
Director of High Schools (Dept. of School Support)	Houston ISD	2014 – 2015
School Support Officer (Dept. of School Support)	Houston ISD	2011 – 2014
High School Principal (Challenge ECHS)	Houston ISD	2006 – 2011

DETAILED SUMMARY OF PROFESSIONAL WORK EXPERIENCE

Raul Yzaguirre School for Success (RYSS)

2023 - Present

Chief of Schools/Chief of Operations

Summary: Leading schools and operations at RYSS under the umbrella of the Tejano Center for Community Concerns; Oversaw the Division of Operations which included IT, Maintenance, New Construction & Expansion, and Nutrition Services; Supervision of 6 principals and 10 schools, oversight of Academics and Federal State Compliance, district and campus budget creation and oversight, student enrollment and engagement, all correspondence and activities associated with TEA

Selected Accomplishments:

- Achieved a “B” rating for the district overall, 5 “A-rated” campuses in 2024-2025
- Launched the opening of a new Pre-K - 2 campus in Pasadena which will eventually rise to 8th grade including purchase and renovation of building
- Opened a new high school in Brownsville began with 9th grade with three-phase new building coordination and negotiations
- Installation of new programming at the high schools expanding the P-TECH Early College offerings
- Implementation of TEA Blue Bonnet curriculum in elementary and middle grades
- Recruited a second band director for middle school students resulting in RYSS Jazz Band winning UIL of H annual competition and state award winning UIL participation
- Increased enrollment by 8% annually

Houston Independent School District

2018 - 2023

Assistant Superintendent/Executive Director

Office of School Choice

Selected Accomplishments:

- Oversight of 128 Magnet programs (*Region V Director & board member Magnet Schools for America, President for Magnet Schools of the Mid-South*) in 117 campuses, 29 other transfer types, 3,600 different transfer options spanning 287 campuses, and the functioning of an office with 35 employees.
- Over 90,000 students in the district are on transfers to the school they attend while 67,000 attend campuses that are outside of the boundaries of their zoned campus.
- Facilitated and served on the Magnet Program Evaluation Review Committee
- Led the task force with reforming the Magnet system to be more equitable, creation of an online application system for the 29 non-magnet transfer types
- Led the coordination of a single online application system through a vendor to have all magnet and non-magnet applications done at once to ease the process.
- Coordination and management of the US Department of Education – Magnet Schools Assistance Program utilizing \$15 million to create STEM programs in schools, specifically through partnerships with Baylor College of Medicine and NASA.
- Wrote and awarded \$12 million ESSER Enrollment Funding
- Wrote and awarded \$5 million Texas Early College Initiative’s Model School grant

Houston Independent School District

2015 – 2018

Principal, R. S. Sterling Aviation High School

Summary: Sterling HS is an urban economically disadvantaged campus with a student body that serves 52% of the area’s African American students, 45% of the area’s Hispanic students, 2% of the area’s Caucasian students and 1% of the area’s multiple race students.

Selected Accomplishments:

- Sterling HS achieved “Met Standard” every year, 2015-2018
- Sterling HS achieved a total of 5 TEA Campus Level Distinctions in three years
- Served as top instructional leader of 130 faculty and staff members and 1385 students while implementing a democratic model of servant leadership.

- Sterling was a multi-year Improvement Required status school where the immediate implementation of multiple changes in the school's systems brought the school out of Improvement Required status.
- Created multiple Career and Technical Education programs to provide students a more relevant educational experience.
- Revamped master schedule to provide common planning periods for all departments, and processes to use data-driven instructional planning to determine the individual needs of all students.
- Wrote and awarded \$8 million grant to convert the programming of the school to that of an Early College

Houston Independent School District
Director of High Schools

2014 – 2015

Department of School Support, High Schools Office

Summary: Responsibilities include directing, supervising, and evaluating the School Support Officers who were responsible for the implementation of all education programs, support services, and business and compliance functions within all high schools. Developed an overall strategic plan for schools aligned to the district's priorities. Implemented and communicated the district's initiatives and strategies used for increasing student achievement and promoting the district as a whole.

Selected Accomplishments:

- Directed, coordinated, and supervised the operations and staff members within the Office of High School Education and fifty-five High School Principals.
- Oversaw \$135 million in operation funds.
- Coordinated the implementation of PowerUp 1:1 technology initiative, saving the district funding of textbook replacement costs annually.
- Led the restructuring of the School Support Model from one of coaching to supervisor, having to retrain School Support Officers to balance the coaching and supervising of Principals to ensure that trust is maintained, district mandates are met, and that Principals are held to a standard of excellence.

OTHER LEADERSHIP ROLES IN EDUCATION AT HOUSTON ISD

School Support Officer 2011 - 2014
 Department of School Support, High Schools Office

Principal 2006 - 2011
 Challenge Early College High School

Dean of Students/Assistant Principal 2002 - 2005
 Challenge Early College & S.P. Waltrip High Schools

SUMMARY OF TEACHING EXPERIENCE

Mathematics Teacher 1997 – 2002
 M. B. Lamar High School

SUMMARY OF HIGHER ED EXPERIENCE

WILLIAM MARSH RICE UNIVERSITY Field Advisor 2011 - 2016
 Rice Educator Entrepreneurship Program

Summary: Acting as both a mentor and advisor to program participants, includes both sitting Principals and teachers who are pursuing a certification in public education administration while completing their Masters in Business Administration. Act as a resource for one to two participants per academic year. For sitting Principals, act as a resource for implementation of programs on their campus and a reviewer of the programs final project. For aspiring administrators, act as both a resource for the program final project and endorser for their state administrative certification

PRESENTATIONS / PUBLICATIONS

- ALAS – Integrating The Digital World Into The School World
- Council for Great City Schools – Using Dual Enrollment to Ensure that Students are College Ready
- North Carolina Small School Initiative – Early College Transition
- Middle College National Consortium – Collaboration and Support for Embedded Students
- Yale Club of Houston – College Options in Houston’s Public Schools
- Administrator Tiered Presentation
- Goal Assessment and Direction
- Small Learning Communities (SLC)
- 3r’s – Rigor Relevance and Relationships

PROFESSIONAL AFFILIATIONS

- Texas Association of Secondary School Administrators
- Texas Association of School Administrators
- Association of Latino Administrators and Superintendents
- Texas Association for Latino Administrators and Superintendents
- Association of Hispanic School Administrators
- Middle College National Consortium
- Houston Association of School Administrators
- National Council of Urban School Transformation

Attachment 7 - Information Sheet –Challenge Early College HS

Principal

José R. Santos is a veteran public educator and school leader with 25 years of experience in Houston ISD, recognized for building high-performing, student-centered systems that expand opportunity and accelerate outcomes. He currently serves as Principal of Challenge Early College High School, where he has strengthened early-college pathways, increased access to dual credit beginning in ninth grade, and established data-driven routines that support strong attendance, rigorous instruction, and targeted interventions for every learner. Previously, he served as Principal of Middle College High School at HCC Fraga, where he developed and scaled systems that dramatically increased student participation in college coursework and expanded College, Career, and Military Readiness—helping more students graduate with both a high school diploma and meaningful college credit toward an associate degree. Earlier in his career, Mr. Santos served as an Assistant Principal at Sterling Aviation Early College High School, Dean of Students for the Advanced Virtual Academy, and a Career and Technology Education teacher at East Early College High School, where he was named Teacher of the Year. Known for his collaborative leadership style, strong accountability focus, and commitment to student success, Mr. Santos partners closely with families, colleges, and community organizations to ensure every student graduates prepared for college, career, and life.

Assistant Principal

Tracy B. Celestine is a dynamic instructional leader with over a decade of experience improving student achievement, strengthening teacher practice, and leading campus operations within Houston ISD. She currently serves as Assistant Principal at Challenge Early College High School, where she oversees ninth grade, leads ELA and Social Studies departments, manages the dual credit and English Learner programs, and supports campuswide systems for instruction, attendance, and intervention. Ms. Celestine brings deep expertise in data-driven instruction, professional learning communities, teacher coaching, and early college program implementation, with prior leadership roles spanning middle and high school campuses, district instructional support, and early college environments. Her background, certifications as a Texas EC–12 Principal and ESL specialist, and demonstrated success in instructional leadership and operational management position her as a strong contributor to sustaining high performance, equity, and compliance within an SB 1882 governance framework.

Assistant Principal

Christopher W. Saikin serves as the Dean of Students at Challenge Early College High School (since August 2020) and brings deep experience in campus operations, instructional leadership, and compliance systems that directly support CECHS's early college mission. In his current role he supports key campus functions such as serving as the HB 4545 liaison, Campus Testing Coordinator, T-TESS certified appraiser, AP Campus Coordinator, TSIA2/Accuplacer site administrator, and Safety Captain—ensuring strong systems for student support, assessment, and safe campus operations. He has also led professional learning nationally on effective instruction, rigor, and AP Biology through the National Math + Science Initiative and the College Board, and has planned and implemented professional development for both new and veteran teachers as a district AP PLC Lead Teacher. Previously, he served as Science Department Chair at DeBakey High School for Health Professions and supported measurable improvement in STAAR Biology Level III outcomes over multiple years. Mr. Saikin holds an M.Ed. in Educational Leadership and Policy Studies from The University of Texas at Arlington, a B.A. in Biology from The University of Texas at Austin, and holds Texas Principal and Science (8–12) certifications.

Resumes Included

José Rodrigo Santos

CAREER GOAL

Results-driven educational leader with 25 years of experience and a proven record of elevating high school performance through strong instructional leadership, data-driven systems, and early-college/CCMR program design. As Principal of Challenge Early College High School (since August 2022) and former Principal of Middle College High School at HCC Fraga (2019–2022), he has built sustainable systems that expand dual credit participation, strengthen Tier 1 instruction through tight feedback cycles, and scale targeted supports (tutorials, small groups, Saturday learning) to improve student achievement, attendance, and graduation outcomes. He is highly fluent in accountability and performance management and is well positioned to lead a Level 5 autonomy high school under an SB 1882 performance contract—serving as a school-based CEO/superintendent who drives strategy, talent, operations, and partner alignment while delivering exceptional results for students, families, and the district.

CORE STRENGTHS

Instructional Leadership (Tier 1, PLCs, data cycles) • Early College / Dual Credit Systems • CCMR & Graduation Systems • MTSS/Interventions • Master Scheduling • Staff Development & Coaching • Student Culture & Engagement • Community Partnerships • Compliance & Accountability (TEA/HISD)

EDUCATION

M.Ed., Educational Administration — Prairie View A&M University (May 2015)

B.B.A., Computer Information Systems — University of Houston–Downtown (Dec 2004)

PROFESSIONAL EXPERIENCE

Principal — Challenge Early College High School (Houston ISD) | Houston, TX

August 2022 – Present

Challenge ECHS is rated “A” in the latest Texas A–F accountability release and reports a 100% four-year graduation rate (Class of 2023).

Selected accomplishments (since August 2022):

- Built an attendance success system (student/parent checkpoints, early interventions, culture routines) resulting in sustained, top-tier attendance; improved ADA from 97% (2022–23) to 98% (2024–25) (campus-reported).
- Expanded early-college access and readiness by strengthening course selection processes, onboarding supports, and student monitoring so more students begin dual credit earlier (including intentional 9th-grade entry into college-credit momentum).
- Achieved 100% of 10th graders meeting CCMR readiness milestones by January 2024 through a structured monitoring system, targeted supports, and aligned advising (campus-reported).
- Integrated new college-and-career pathways with Houston Community College, including cybersecurity and artificial intelligence opportunities for students (campus-reported).
- Strengthened instructional coherence across Dual Credit, AP, and UT OnRamps through tighter alignment of curriculum, assessments, and teacher planning routines—supported by frequent classroom feedback cycles and “look-for” expectations (TEKS/objectives, agenda, demonstration of learning, aligned lesson materials).
- Sustained strong postsecondary indicators including robust graduation outcomes and college readiness measures (e.g., SAT/ACT averages reported publicly).
- Recognized publicly among Houston-area top-performing schools in statewide reporting.
- TEA Campus ID/Number: 101912323 (public directory listing).

Principal — Middle College High School at HCC Fraga (Houston ISD) | Houston, TX

June 2019 – August 2022

Fraga was rated “A” in the Texas A–F accountability release and reports a 100% four-year graduation rate (Class of 2022).

Selected accomplishments (2019–2022):

- Redesigned the early-college system: moved the campus from minimal dual credit participation to a structured model where students regularly enrolled in college coursework and progressed toward graduating with an associate degree within four years (campus-reported).
- Expanded dual credit participation from 6% to 78% by building scheduling/advising systems, strengthening onboarding, and creating student supports aligned to college readiness (campus-reported).

- Increased CCMR attainment from 13% (2019) to 85% (2022) by aligning programming, tracking readiness indicators, and ensuring access to credentialed pathways (campus-reported).
- Launched a Marketing & Enterprise CTE pathway aligned to HCC Level 1 Marketing/Retail coursework to create a clear college-to-career bridge (campus-reported).
- Accelerated STAAR outcomes via data cycles, targeted interventions, tutorials, Saturday supports, and “spark” camps; improved results across tested areas (ELA, Algebra I, U.S. History, Biology) with several areas reaching near/at 100% (campus-reported).
- Improved attendance through family engagement checkpoints and student monitoring systems, reaching 98% in 2021 (campus-reported).
- Led COVID-era operational and instructional continuity, implementing safety and learning systems to support staff, students, and families (campus-reported).
- TEA/State school ID includes campus number 101912485 (public NCES directory listing).

**Assistant Principal — Sterling Aviation Early College High School (Houston ISD) | Houston, TX
2015 – 2019**

- Led intervention planning for first-time testers and retesters; organized data, supported curriculum alignment, and facilitated teacher-facing data cycles.
- Conducted 48+ observations/walkthroughs using the district rubric; coached teachers to strengthen Tier 1 instruction.
- Supervised Early College implementation (dual credit course access and compliance); supported student scheduling for graduation and state requirements.
- Delivered campuswide professional development (AVID, data analysis, close reading, early college, T-TESS/TADS processes, graduation supports).
- Helped increase campus attendance from 88% (2015–16) to 90.4% (2016–17) and sustain >90% thereafter (campus-reported).

**Dean of Students — Advanced Virtual Academy (Houston ISD) | Houston, TX
2013 – 2015**

- Oversaw multi-role compliance and operations (testing, attendance, dropout prevention, 504, Title I, LPAC/LEP supports).
- Recovered 170+ students over two years through strategic outreach and home visit systems (campus-reported).
- Built staff capacity through weekly professional development and coaching.

**Career & Technology Education Teacher — East Early College High School (Houston ISD) | Houston, TX
2007 – 2013**

- Delivered project-based CTE instruction; led robotics program (multiple competitions).
- Coordinated AP program and increased students meeting AP criterion by 35% (campus-reported).
- Served in multiple campus leadership roles (CTC, Title I, HCC liaison, GT/AP/At-Risk/LEP coordination).
- Teacher of the Year (2007–08).

**Registrar — Mirabeau B. Lamar High School (Houston ISD) | Houston, TX
2001 – 2007**

- Managed 4,000+ student records; supported major SIS transition and trained 175+ teachers (campus-reported).
- Supported ARD/LPAC compliance and differentiated supports for students.

PROFESSIONAL & COMMUNITY INVOLVEMENT

- Member: Association of Hispanic School Administrators; Houston Association of School Administrators; Texas Association of Secondary School Principals
- Conducted 300+ home visits (2007–present) and trained volunteers for graduation recovery outreach (campus-reported)
- Member: Sterling Aviation Advisory Board

TRACY CELESTINE



LEADERSHIP PROFILE

Dynamic instructional leader with 10+ years of experience improving student achievement, strengthening teacher practice, and leading campus operations. Proven success in instructional coaching, data-driven decision making, English Learner programming, and development of systems that increase attendance, behavior, and academic performance. Collaborative communicator committed to equity, high expectations, and positive school culture.

LEADERSHIP EXPERIENCE

Houston ISD – Challenge Early College High School, Houston, TX

Assistant Principal | August 2022 – Present

- Oversee daily campus operations for 9th grade and the English Language Arts and Social Studies departments.
- Evaluate, coach, and develop teachers in instructional best practices, data-driven instruction, and classroom management.
- Plan and facilitate weekly Professional Learning Community (PLC) meetings for ELA and Social Studies teams.
- Lead bi-weekly 9th grade level meetings to monitor student progress and campus initiatives.
- Design and deliver professional development on instructional strategies and digital platforms.
- Create instructional technology tutorials to increase staff capacity and instructional effectiveness.
- Manage the dual credit program to ensure students successfully attain high school diplomas and associate degrees within four years.
- Supervise the English Learner (EB) program and serve as LPAC administrator.
- Oversee campus intervention systems to improve student achievement, behavior, and attendance.

- Collaborate with administration on recruitment, hiring, and development of high-quality staff.
- Assist in development and implementation of the Campus Improvement Plan.
- Supervise extracurricular activities and ensure a safe learning environment.
- Assume principal responsibilities in the absence of the campus principal.

Houston ISD – McReynolds Middle School, Houston, TX

Assistant Principal | June 2021 – August 2022

- Managed daily operations for 8th grade and STEM building.
- Coached English teachers to strengthen instructional delivery and classroom culture.
- Facilitated PLCs for ELA, Social Studies, and elective departments.
- Delivered campus-wide professional development on instructional technology integration.
- Supervised TELPAS administration and compliance.
- Supported intervention systems to improve attendance and academic outcomes.
- Partnered with families and community stakeholders to support student success.
- Assisted with staff selection and campus improvement planning.
- Served as acting principal when needed.

Houston ISD – Middle College High School @ HCC Felix Fraga, Houston, TX

Campus Educational Technologist / Campus Administrator | January 2019 – June 2021

- Coached teachers in ELA, Social Studies, and electives using data-driven instructional practices.
- Led weekly PLCs and designed professional learning on platforms such as Apex Learning, IXL, and ItsLearning.
- Served as IAT liaison coordinating Tier 2 and Tier 3 academic and behavioral interventions.

- Administered graduation lab and online credit recovery programs for at-risk students.
- Facilitated TELPAS testing and dyslexia interventions using Reading by Design.
- Coordinated attendance appeals and Saturday school programs.
- Evaluated transcripts and monitored graduation requirements.
- Supervised campus operations in the absence of the principal.

Houston ISD – Middle College High School @ HCC Felix Fraga

Summer School Coordinator | June 2020 – July 2020

- Developed master schedule and instructional plans to increase summer achievement.
- Hired, trained, and supervised summer faculty and staff.
- Monitored online learning programs and provided student discipline support.
- Conducted transcript reviews to ensure on-time graduation.

Houston ISD – Houston, TX

Teacher Development Specialist | August 2017 – December 2019

- Provided job-embedded coaching and real-time feedback to high school ELA teachers.
- Supported campuses in achieving STAAR growth of 13–15 percentage points in English I and II.
- Analyzed performance data with principals to target instructional priorities.
- Modeled research-based instructional strategies and monitored implementation.
- Designed district assessments and standards-aligned lessons.

Sheldon ISD – C.E. King High School, Houston, TX

Principal Intern | August 2014 – February 2016

- Assisted with development of campus improvement plans and performance monitoring.
 - Supervised campus operations and student activities in principal's absence.
 - Facilitated PLC meetings and promoted technology integration.
 - Supported a positive, student-centered school climate.
-

TEACHING EXPERIENCE

- Humble ISD – Humble High School, Humble, TX
 - English I, Pre-IB English I, Strategic Reading & Writing | August 2016 – June 2017
 - Sheldon ISD – C.E. King High School, Houston, TX
 - English I–IV, ESL, Team Lead | January 2009 – May 2016
-

EDUCATION

- M.Ed., Educational Administration & Leadership – Lamar University
 - B.A., English – University of Houston–Downtown
 - MSO Leaders on the Rise Cohort – 2021–2022
 - Houston ISD APCDO Cohort – 2020–2021
-

CERTIFICATIONS

- Principal (EC–12), Texas – 2016
- ESL (Grades 8–12), Texas – 2015
- English Language Arts (Grades 8–12), Texas – 2010



Profile and Skills

- Served as Assistant Principal at Challenge Early College High School with duties including HB 4545 liaison, Campus Testing Coordinator, T-TESS certified appraiser, Accuplacer Site Administrator for TSIA2 Testing, Campus Testing Coordinator, Safety Captain, AP Campus Coordinator.
- Presented multiple professional development sessions across the country on topics including technology use in the classroom, student-centered instruction, increased rigor, and AP Biology for the National Math + Science Initiative and the College Board.
- Planned and implemented multiple teacher professional development opportunities for 20-30 new and experienced teachers as a district AP PLC Lead Teacher.
- Served as Science Department chair at DeBakey High School for Health Professions with success working with teachers to raise STAAR Biology level III scores by 7% over 3 years.
- Worked to provide solutions to district recapture, budget options, and other Houston I.S.D. issues as an elected member of the District Advisory Committee.
- Taught secondary science with success in increasing STAAR test level III scores (masters), AP test participation, and AP qualifying score percentages (3-5).
- Chosen as Houston I.S.D. Career Pathways Instructional Technology Specialist to help increase campus integration of technology into classroom instruction.

Work Experience

Dean of Students - Challenge Early College High School, Houston, TX

Aug. 2020 – Present

- Magnet High School with enrollment of 460 students
- Title 1 Campus with 72% students categorized as economically disadvantaged

Teacher - Michael E. DeBakey High School for Health Professions, Houston, TX

Aug. 2009 – Aug. 2020

- Magnet High School with enrollment of 890 students
- Title 1 Campus with 42% students categorized as economically disadvantaged

Teacher - McNeil High School, Round Rock, TX

Aug. 2007 – July 2009

- High school with enrollment of 2,673 students
- 24.4% of students categorized as economically disadvantaged, 5.2% English Learners, 9.6% Special Education

Teacher - Lanier High School, Austin, TX

Aug. 2006 – July 2007

- High school with enrollment of 1,584 students
- Title 1 Campus with 79% of students categorized as economically disadvantaged and 31% English Learners

Education and Certifications

The University of Texas at Arlington

Jan. 2010 – Aug. 2011

M.Ed. in Educational Leadership and Policy Studies

The University of Texas at Austin

Aug. 2002 – May 2006

B.A. in Biology

Texas Teaching Certification

May 2007

Composite Science 8-12

Texas Principal Certification

March 2013



Attachment 8 - Recruitment & Hiring Strategy for Campus Roles Challenge Early College High School (CECHS)

1. Purpose and Staffing Philosophy

CECHS is an Early College High School designed to graduate students with a Distinguished high school diploma, college credit, and strong College, Career, and Military Readiness (CCMR) outcomes. Our hiring strategy prioritizes excellent Tier 1 instruction, high expectations, and strong culture so that every classroom is college-preparatory and every student is supported to succeed in rigorous coursework (Dual Credit, UT OnRamps, and AP).

2. Selection Criteria: High Standards and Mission Alignment

CECHS uses selection criteria aligned to HISD hiring expectations and the demands of an Early College program. All candidates must demonstrate:

- Instructional expertise and evidence of student academic growth; ability to plan and deliver TEKS-aligned lessons with clear objectives, checks for understanding, and timely re-teach/enrichment.
- Strong professional habits: punctuality, consistent attendance, preparation, and reliability - aligned to a high-performance culture.
- Data-driven practice: comfort using formative data, interim assessments, and PLC cycles to adjust instruction and support subgroups.
- Commitment to rigorous expectations, equitable access, and strong relationships with students and families.
- Coachability and reflective practice: demonstrates openness to frequent feedback and continuous improvement.
- Readiness for early-college rigor: ability to support students in advanced coursework expectations and academic behaviors (organization, self-advocacy, study skills).

Required hiring components (per district process) include certification verification, completion of a performance task, review of the Teacher Employee Value Proposition (EVP), and a structured full interview that assesses emotional quotient, instructional skill, and culture/leadership alignment.

3. Hiring Protocol and Decision Rules

CECHS follows a consistent, legally sound, and equity-centered protocol so that hiring decisions are transparent and aligned to student outcomes.

3.1 Stage 1 – Workforce Planning (January–February)

1. Conduct needs analysis based on projected enrollment, master schedule, and program requirements (Dual Credit, UT OnRamps, AP, SPED, EB, CTE, electives).
2. Administer an 'Intent to Return' survey and hold individual check-ins to estimate vacancies early.
3. Identify hard-to-fill roles and develop targeted recruiting plans (e.g., SPED, bilingual/ESL, advanced STEM).

3.2 Stage 2 – Candidate Sourcing (February–May)

4. Launch recruitment through multiple pipelines: HISD teacher pool postings, district career fairs/Teacher Kickoff event, internal transfer candidates, university partners, and referrals.
5. Use targeted outreach for specialized roles (CTE, world languages, SPED) when separate postings are required.
6. Maintain a living candidate tracker (role, certification, interview stage, disposition, next steps).

3.3 Stage 3 – Screening and Pre-Interview Checks

7. Resume screening using mission-aligned look-fors (evidence of growth, rigorous planning, data use, strong culture).
8. Verify certification and eligibility through district systems and screening steps prior to final hiring.
9. Confirm completion and score of the district performance task prior to proceeding to final recommendation.

3.4 Stage 4 – Interview and Selection

10. Structured 45-minute interview (campus or career fair) with common questions and rating notes.

11. Campus-based interview at CECHS includes: (1) orientation to Early College expectations; (2) classroom visits to exemplary instruction; (3) candidate reflection and Q&A; and (4) leadership panel interview.
12. Demonstration lesson or performance artifact review (lesson plan + CFU strategy + student work) for finalist candidates.
13. Reference checks focusing on reliability, attendance, collaboration, student outcomes, and professionalism.

3.5 Stage 5 – Offer, Onboarding, and July 1 Staffing Readiness

14. Issue preliminary offer through HISD hiring process; ensure the correct position control (PC#) and title alignment.
15. Complete pre-hire steps (background checks, credential verification, HR processing).
16. By July 1: all core vacancies are filled and onboarding plans are scheduled (new teacher orientation, Early College compliance training, campus culture norms, and instructional expectations).

4. Interview Question Bank (Mission-Alignment and Performance)

CECHS uses structured questions to assess work ethic, planning, proactiveness, attendance, culture building, data use, PLC participation, and family engagement. Sample questions:

- In two minutes, tell us the most important things we should know about you as an educator and teammate.
- Describe a lesson you taught recently: objective, checks for understanding, how you responded when students did not meet the objective.
- How do you plan a TEKS-aligned unit and build an assessment plan (daily CFUs, weekly checks, unit assessment)?
- Share a time you used student data to change instruction within the same week. What did you change and why?
- What does high-quality instruction look like in an Early College setting where expectations are college-preparatory every day?
- What does a strong, safe, and supportive classroom culture look like? How do you build it in the first two weeks of school?
- Attendance and punctuality matter at CECHS. Tell us about your attendance habits and how you ensure reliability for students.
- How do you collaborate in PLCs (planning, analyzing common assessments, reteach/enrichment groups)?
- Describe how you communicate with families proactively—especially when a student begins to struggle academically or with attendance.
- How do you support multilingual learners and students with disabilities using accommodations and scaffolds while maintaining rigor?
- How do you respond to coaching feedback delivered during instruction? Give an example of feedback you implemented quickly.
- CECHS has after-school tutorials, events, and family engagement expectations. How have you participated in similar commitments?

5. Recruitment and Hiring Timeline (Fully staffed by July 1)

Timeframe	Key Actions	Owner(s)	Evidence / Deliverables
Jan–Feb	Workforce planning; enrollment + master schedule needs analysis; intent-to-return survey; identify hard-to-fill roles; update staffing tracker.	Principal/Superintendent, APs, Counselor	Staffing plan draft; vacancy forecast; recruiting targets.
Feb - Mar	Begin active recruiting and interviewing; prioritize internal	Principal/AP Hiring Team	Candidate pipeline; completed interviews; rubric notes.

	transfers per district windows; attend district hiring events/career fairs; initiate campus interview days.		
Apr	Continue hiring; prioritize critical shortage roles; finalize department staffing; complete reference checks; submit recommendations to HR.	Principal/APs, Dept Leads	Offers initiated; cleared candidates; PC# alignment.
May	Close remaining vacancies; hire for summer school/extended learning where needed; finalize contingency plan for late separations.	Principal/APs	All known vacancies filled; onboarding schedule set.
Jun	Onboarding and training: Early College compliance, culture systems, planning expectations, PLC routines; finalize schedules and course assignments.	Principal/APs, Instructional Coaches	New staff orientation completion; finalized master schedule.
By Jul 1	Verify all positions staffed; finalize HR processing; publish campus roles and responsibilities; prepare day-one readiness plan.	Principal/Superintendent	100% staffing confirmation; onboarding complete; readiness checklist.

6. Continuous Improvement and Candidate Experience

CECHS maintains a professional, fair interview experience and uses structured notes and rubrics to reduce bias and improve decision quality. After each hiring season, the leadership team reviews hiring outcomes (retention, performance, culture fit, and student outcomes) to refine sourcing strategies, interview questions, and onboarding supports for the following year.

Under Level 5 autonomy through the SB 1882 Texas Partnership, Challenge Early College High School has the flexibility to design and implement campus roles that best meet CECHS's operational and student-support needs, even when identical positions are not currently established within Houston ISD's standard job catalog. In addition, CECHS has greater discretion to determine compensation structures for these roles, including whether a position is funded with extra-duty pay. For example, while the HISD College & Career Readiness Advisor – Campus (Job #30010355) may not be eligible for extra-duty pay under the traditional district structure, CECHS's Level 5 autonomy permits the campus to provide supplemental compensation when aligned to expanded responsibilities, performance expectations, and program needs. Stipends may also be used to compensate CECHS employees for meeting their achievement goals, additional duties or expanded scopes of work, as proposed by campus leadership and reviewed and approved by the board – Friends of Challenge Early College High School in alignment with the campus budget and performance priorities.

Attachment 9 - Staff Development + Retention Plan (CECHS | SB 1882 Level 5 Autonomy)

Challenge Early College High School (CECHS) retains high-performing staff by pairing a strong induction and coaching model with clear performance expectations, meaningful growth opportunities, and compensation structures aligned to impact (student outcomes, instructional quality, and contributions to school culture). Our approach is grounded in the Texas Effective Schools Framework (ESF) Prioritized Lever 2—effective teachers and leaders—with an emphasis on job-embedded adult learning, frequent feedback, and data-driven support to accelerate instructional excellence.

1) Induction Program (Preparing Teachers for the CECHS Early College Model)

Purpose: Ensure every new staff member can deliver rigorous Tier 1 instruction in a campus where students are enrolled in Pre-AP/AP, HCC Dual Credit, UT OnRamps, and AVID, and where high expectations for college readiness and credit attainment are non-negotiable.

Pre-Service Induction (Summer | 5–10 days depending on role)

- **CECHS Handbook & Non-Negotiables:** lesson structure, DOLs, formative checks, discourse routines, academic integrity, tutorial expectations, and college-going culture
- **Curriculum Alignment Training:** TEKS-aligned planning with the option of using HISD resources while meeting the rigor demands of AP, dual credit, and OnRamps
- **Early College Compliance & Partnership Norms:** college syllabus literacy, grading expectations, FERPA considerations, college readiness milestones
- **Special Populations in Advanced Coursework:** accommodations, scaffolds, EB supports, 504 implementation, inclusive access without lowering rigor
- **AVID/WICOR Foundations:** organization, inquiry, note-taking, collaborative learning, and student self-advocacy routines
- **Instructional Rehearsal (“Teach-Back”):** teachers deliver a mini-lesson using CECHS expectations, receive feedback, revise, and re-teach

First 30/60/90 Days (School-Year Onboarding)

- Assigned mentor + weekly check-ins
- 3-week data cycle training (grades, attendance, formative data, DOL trends)
- Observations of exemplar teachers (campus “model classrooms”)
- Co-planning support and “unit internalization” coaching

2) Evaluation Tools + Processes (Tracking Growth, Trends, and Instructional Impact)

CECHS uses a consistent evaluation cycle that captures instruction quality over time and connects support to measurable student outcomes.

Tools

- Frequent walk-through rubric aligned to campus “look-fors” (objective/DOL alignment, checks for understanding, discourse, differentiation, pacing, rigorous tasks)
- Formal observations with the option of using tools aligned to HISD frameworks (e.g., TTESS/NIES or other district-approved tools); under SB 1882 Level 5 autonomy, Challenge Early College High School may adopt an alternative teacher evaluation system - subject to approval by the Friends of Challenge Early College High School governing board - provided it meets all TEA expectations and applicable state requirements for educator appraisal, documentation, and continuous improvement
- Student learning evidence: DOL mastery trends, common assessment outcomes, STAAR/EOC growth, AP classroom progress, OnRamps checkpoints, dual credit pass rates
- Professional responsibilities: attendance, timeliness, family communication, PLC contributions, tutorial participation, compliance tasks (LPAC/504/SPED supports)

Trend Monitoring

- Monthly department trend reviews: engagement, rigor, assessment quality, subgroup performance

- Quarterly “instructional health” report to campus leadership and (as appropriate) board academic committee: strengths, gaps, action steps

3) Targeted and Personalized Support for Staff (Coaching + Improvement Cycles)

Support is differentiated based on teacher experience and performance, with clear entry/exit criteria.

Tiered Support System

- Tier A (Sustain/Extend): high performers receive leadership pathways, peer observation roles, model classroom designation, and opportunities to lead PD
- Tier B (Refine): targeted coaching cycles - focused on one high-leverage action (e.g., CFUs, lesson pacing, discourse, writing tasks)
- Tier C (Intensive): weekly coaching + co-planning + frequent observation, with clear performance targets and timelines

Support Structures

- Weekly PLCs (content + grade-level) with protocols: plan → assess → analyze → reteach/enrich
- Instructional rounds and calibration walks to ensure consistent expectations
- Mentor program for new teachers and teachers new to AP/dual credit/OnRamps
- Individual growth plans tied to evaluation outcomes and student data

4) Allocation of Resources for PD and Learning

Under SB 1882 Level 5 autonomy, CECHS allocates resources to maximize teacher effectiveness and retention:

- Protected PD time: pre-service days, weekly PLCs, and scheduled PD sessions
- Funded certifications/training (when applicable): College Board AP/Pre-AP training, UT OnRamps onboarding, HCC dual credit compliance training, AVID institutes
- Stipends/extra duty pay for teacher leaders (PLC leads, model classroom teachers, instructional rounds facilitators, tutoring coordination, curriculum leads), as approved in the campus budget and by the governing board
- Instructional materials and platforms to support rigorous instruction and efficient assessment cycles

5) Qualifications of Personnel Leading PD (Adult Learning Capacity)

Professional development is facilitated by staff with demonstrated results and credibility:

- Principal/Superintendent and Assistant Principals with strong instructional leadership experience and deep early college systems knowledge
- Instructional coaches/teacher leaders with documented student growth outcomes and strong evaluation ratings
- Program leads for AP, UT OnRamps, Dual Credit, and AVID (campus-based coordinators)
- Special populations specialists (SPED/504/EB/dyslexia support lead) to ensure legal compliance and effective instructional scaffolds
- External partners as needed (College Board, UT OnRamps, HCC DC institute, AVID)

6) Professional Development Methods + Calendar (Year-Round)

Methods

- Job-embedded coaching (modeling, co-teaching, feedback loops)
- PLC-driven lesson internalization and assessment design
- Data-driven reteach/enrichment planning (every 3 weeks)
- Micro-PD cycles (15–30 minutes) tied to observed trends
- Peer observation and “lab classroom” learning walks

Calendar (High-Level)

- July–August: Pre-service induction, unit internalization, program compliance training (AP/OnRamps/HCC/AVID), classroom systems
- August - September: Culture & routines; formative assessment mastery; differentiation scaffolds for mixed performance levels

- August - October: Writing across content; discourse; special populations supports in advanced coursework
- September - November: Assessment quality; reteach cycles; semester exam/AP progress monitoring
- December: Midyear reflection; growth plans; retention check-ins
- January: Re-launch; data-driven acceleration; STAAR/EOC/AP/college readiness pacing alignment
- January - February: Lesson rigor calibration; subgroup gap closure; tutoring systems
- January - March: Intervention effectiveness review; AP/dual credit success supports; onboarding hiring plan for next year
- March - April: STAAR/EOC readiness and instructional coherence; onboarding of new hires begins
- April - June: End-of-year data review; celebration; next-year scope/sequence refinement

7) Pay-for-Performance + Retention Incentives (Aligned to Roles, Accountability, and Results)

CECHS uses a transparent performance-based compensation framework (stipends/extra duty and role-based supplements) to retain high performers and reward mission-aligned contributions.

Performance Indicators (weighted locally, board-approved)

- Instructional effectiveness (observation trends + rigor indicators)
- Student growth and mastery (formative trends, common assessments, STAAR/EOCs, AP/OnRamps progress, dual credit success)
- Special populations outcomes (EB/SPED/504 progress monitoring and compliance)
- Professional reliability (attendance, planning quality, deadlines, campus duties)
- Contribution to campus systems (PLC leadership, curriculum work, tutoring, mentoring)

Retention Supports

- Teacher leadership pathways (department lead, program lead, model classroom teacher)
- Stipends for hard-to-staff roles and high-impact responsibilities
- Growth opportunities tied to measurable impact, not tenure alone

8) Culture, Celebrations, and Recognition (Keeping Great People)

CECHS sustains retention through a “high support + high expectations” culture:

- Monthly “CECHS Excellence” recognitions (instructional impact, growth, reliability, student advocacy)
- Recognition for community engagement (Open House, events, parent nights, college celebrations, graduation supports)
- Celebrations of student outcomes linked to teacher work (dual credit success, AP scores, CCMR milestones, attendance gains)
- Staff voice systems: pulse surveys, retention interviews, and leadership roundtables

Attachment 10 - Operating Budget Draft and Narrative

Challenge Early College High School's operating budget for 2026–2027 is now based on the updated March 25, 2026 planning. The updated model now reflects a total resource allocation of **\$3,502,577**, based on **486 students**, **97.7% ADA**, and **474.82 grade-level units**.

Under the updated framework, CECHS's resource assumptions are composed of the following funding sources: **Base Resource Allocation \$664,748**, **Special Population/Weights Allocation \$278,129**, **Salary Allocation \$1,883,700**, **SB 1882 Additional Allocation \$583,200**, and **Magnet Allocation \$92,800**, for a total projected allocation of **\$3,502,577**. The special population allocation currently includes **State Compensatory Education \$96,034**, **Special Education \$7,589**, **Gifted and Talented \$11,740**, **CTE \$144,318**, **ELL \$17,963**, and **Homeless \$486**. The salary allocation continues to assume **21 teacher FTEs** distributed across performance bands, which remains the school's single largest cost driver.

At the same time, the March 25 comparison model shows that the **1882 funding option (Plan 2)** provides the stronger financial position for Challenge Early College High School. The comparison sheet reflects a total **1882 allocation of \$5,173,900**, compared with **\$4,297,864** as an ISD campus, an increase of **\$876,036**. After the **5% administrative fee**, the 1882 allocation is shown as **\$4,915,205**. After subtracting the required **Menu of Services cost of \$866,744**, the 1882 option still yields **\$4,048,461**, compared with **\$3,502,577** under the comparison PPOR framework, a net advantage of **\$545,884**. The same comparison also shows a higher per-pupil amount under the 1882 option.

For that reason, CECHS's updated operating narrative should reflect that the school is planning around the **1882 structure as the preferred operating model**, because it provides greater revenue capacity to sustain the school's early college design, preserve current academic expectations, and invest in the systems necessary to improve student outcomes. The 1882 option is especially important because it creates more room to support staffing, student interventions, college and career advising, expanded academic programming, and school-level operational needs while preserving the ability to maintain the rigor of the CECHS model.

Cost assumptions continue to align to the school's core academic design: **College Board Pre-AP/AP**, **HCC dual credit**, **UT OnRamps**, and **AVID**, supported by strong Tier 1 instruction, PLC systems, lesson internalization, tutorials, and targeted services for special populations. Staffing remains the largest recurring investment because rigorous early college programming depends on a stable teacher workforce able to deliver college-credit-bearing coursework and maintain high expectations for student achievement. Weighted and special population funds are assumed to be directed toward equitable access and student success supports for **SCE**, **EB/ELL**, **SPED/504**, **GT**, **homeless**, and **CTE students**, including tutoring, progress monitoring, instructional materials, compliance supports, and intervention systems.

Under the updated model, the **SB 1882 additional allocation** should be understood not as supplemental margin alone, but as a strategic funding lever to support school autonomy. Those priorities may include expanded student support services, college and career readiness advising, intervention capacity, operational flexibility, salary allocations, stipends or expanded roles tied to school needs, and other mission-aligned investments necessary to strengthen implementation of the performance contract. Likewise, the **Magnet Allocation** remains an important part of the resource picture and should continue to support the school's specialized program design.



This narrative should also reflect an important budgeting reality: while the 1882 option is more favorable for CECHS, final awarded dollars remain subject to HISD's final allocation process, enrollment verification, administrative fee calculations, and required Menu of Services decisions. Accordingly, all current figures should still be treated as **planning estimates for decision-making**, not final awarded amounts. However, based on the March 25 comparison, the school's operating assumption should be that the **1882 model is the better financial option for Challenge Early College High School**, particularly because it generates more net resources after administrative costs and required services than the non-1882 alternative shown in the planning materials.

Finally, any private fundraising, donations, or partner contributions managed by **Friends of CECHS** should continue to be treated as supplemental resources, tracked separately from public funds, and used for mission-aligned enhancements rather than to carry the school's core instructional program. The school's core operating model should continue to be built primarily on public funding streams, with 1882 serving as the strongest current framework for sustaining and improving Challenge's early college model.

<u>Enrollment</u>	Challenge EC				
	486				
<u>Tier One Allotments</u>	ISD	1882	PPOR-1882	1882 vs PPOR	PPOR-PUA
Regular Program Allotment	\$2,346,933	\$2,346,933	\$3,132,134	\$785,201	\$2,768,215
Small and Mid-Sized Allotment	\$0	\$438,421	\$0	(\$438,421)	\$0
Special Education Allotment	\$58,007	\$58,007	\$7,589	(\$50,418)	\$7,589
Dyslexia Allotment	\$4,972	\$4,972	\$0	(\$4,972)	\$0
Career and Technical Allotment	\$616,791	\$732,011	\$144,318	(\$587,693)	\$144,318
State Compensatory Ed Allotment	\$650,400	\$650,400	\$96,034	(\$554,366)	\$96,034
Bilingual/ESL Allotment	\$62,278	\$62,278	\$17,963	(\$44,315)	\$17,963
Early Education Allotment	\$0	\$0	\$0	\$0	\$0
Gifted/Talented Allotment	\$9,965	\$9,965	\$11,740	\$1,775	\$11,740
Total Tier One Entitlement	\$3,749,347	\$4,302,988	\$3,409,778	(\$893,210)	\$3,045,859
<u>Tier One Allotments</u>					
WADA	603.274	692.355	\$0	(692.36)	\$0
Guaranteed Yield Level 1	\$129.5206	\$129.5206	\$0	(\$130)	\$0
District Tax Rate Level 1 (DTR1)	\$0.0702	\$0.0665	\$0	(\$0.07)	\$0
Level 1 Entitlement	\$548,517	\$596,417	\$0	(\$596,417)	\$0
Guaranteed Yield Level 2	\$49.720	\$49.720	\$0	(\$50)	\$0
District Tax Rate Level 2 (DTR2)	\$0.0000	\$0.0301	\$0	(\$0)	\$0
Level 2 Entitlement	\$0	\$103,661	\$0	(\$103,661)	\$0
Total Tier Two Entitlement	\$548,517	\$700,077	\$0	(\$700,077)	\$0
<u>Total M&O Funding (As an ISD Campus)</u>					
Total Charter Facility Allotment	\$0	\$170,834	\$0	(\$170,834)	\$0
Total Magnet Allotment - HISD	\$0	\$0	\$92,800	\$92,800	\$92,800
Total	\$4,297,864	\$5,173,900	\$3,502,578	(\$1,671,322)	\$3,138,659
Increase as 1882 vs ISD Campus		\$876,036			
20% of Additional 1882 Funds		\$0			
Allocation less 20%		\$5,173,900			
Admin Fee		\$258,695	\$175,129		
0.05					
Adjusted Allocation less 5% Admin. Fee		\$4,915,205	\$3,327,449		
Menu of Services - Required		\$ 866,744			
Menu of Services - Optional					
Total Menu of Services Cost		\$ 866,744			
Allocation less Admin Fee and Required Menu of Services		\$4,048,461	\$3,327,449	(\$721,012)	
FY25-26 Allocation			\$3,170,363	\$157,086	
FY26-27 Allocation as PUA					\$3,138,659
PPOR % of 1882		78%	64%	-14%	
Per Pupil		\$8,330	\$7,207	(\$1,123)	

GRADE LEVEL UNITS

		ADA% 97.7%					
		Year 1					
<u>Grade Level</u>	<u>Enrollment</u>		<u>FTE</u>		<u>Grade Level Units</u>	<u>Multiplier</u>	<u>Total Grade Level Allocation</u>
EE-PK	0	X	0.5	=	0	\$ 1,400	\$ -
K-12	486	X	1	=	474.82	\$ 1,400	\$ 664,748
TOTAL GRADE LEVEL UNITS	486				474.82		\$ 664,748

SPECIAL POPULATION UNITS

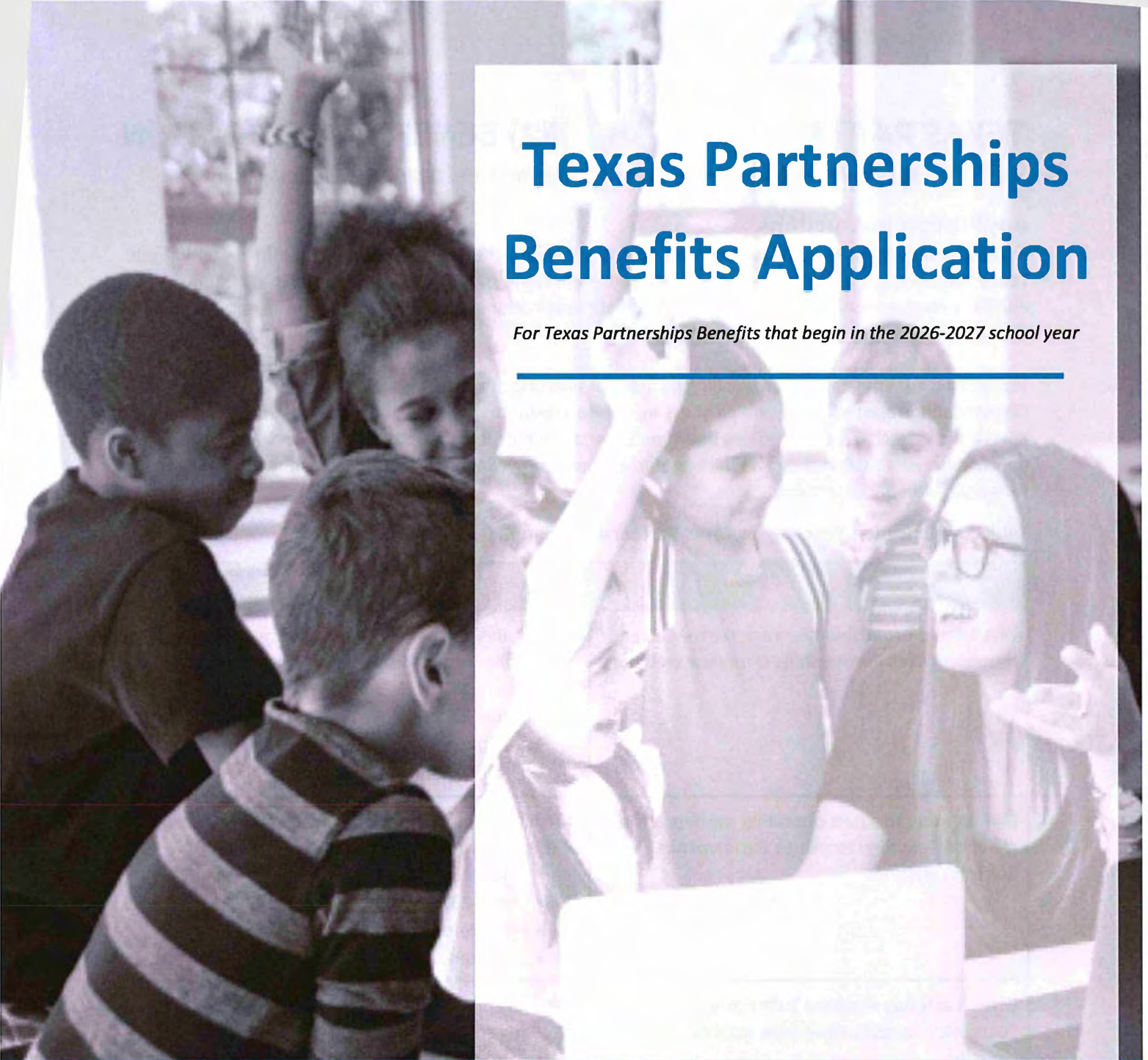
	<u>Count</u>		<u>Weight</u>		<u>Refined Units</u>	<u>Multiplier</u>	<u>Allocation</u>
SCE (AT-RISK UNITS)	316	X	10%	=	31.59	\$ 3,040	\$ 96,034
SPECIAL EDUCATION UNITS	15	X	15%	=	2.19	\$ 3,470	\$ 7,589
GIFTED & TALENTED UNITS	146	X	12%	=	17.50	\$ 671	\$ 11,740
CTE UNITS	44	X	35%	=	15.31	\$ 9,427	\$ 144,318
ELL UNITS	102	X	11%	=	11.23	\$ 1,600	\$ 17,963
REFUGEE UNITS	0	X	5%	=	0.00	\$ 1,000	\$ -
HOMELESS UNIT	10	X	5%	=	0.49	\$ 1,000	\$ 486
TOTAL SPECIAL POP UNITS					78.30		\$ 278,129

SALARY ALLOCATION

	<u>Unsat</u>	<u>Prog I</u>	<u>Prog II</u>	<u>Prof I</u>	<u>Prof II</u>	<u>Exem</u>	<u>Total</u>
Deviation	0	0.16	0.32	0.35	0.12	0.05	1.00
Main Teachers	\$ 64,000	\$ 70,000	\$ 74,000	\$ 80,000	\$ 86,000	\$ 92,000	
Main Teachers FTE Total	0	3	7	7	3	1	21
Main Teachers Sub Total	\$ -	\$ 210,000	\$ 518,000	\$ 560,000	\$ 258,000	\$ 92,000	\$ 1,883,700

TOTAL PPOR ALLOCATION SUMMARY

	<u>Units</u>		<u>PPOR AMOUNT</u>		<u>Amount</u>
BASE RESOURCE ALLOCATION (Grade level units)	475	X	\$1,400	=	\$ 664,748
WEIGHTS ALLOCATION	78			=	\$ 278,129
SALARY ALLOCATION				=	\$ 1,883,700
1882 ADDITIONAL ALLOCATION	486	X	\$1,200	=	\$ 583,200
MAGNET ALLOCATION				=	\$ 92,800
TOTAL RESOURCE ALLOCATION					\$ 3,502,577

A background image showing a group of diverse children and a teacher. On the left, two young boys are looking towards the right. In the center and right, a group of children and a woman with glasses (the teacher) are gathered around a table, looking at a laptop screen. The scene is brightly lit, suggesting a classroom or meeting room.

Texas Partnerships Benefits Application

For Texas Partnerships Benefits that begin in the 2026-2027 school year



TEXAS PARTNERSHIPS (SB 1882) BENEFITS APPLICATION

For Texas Partnerships Benefits that begin in the 2026-2027 school year

Application Instructions

This document is the application for Texas Partnerships (SB 1882) benefits. For more information about Texas Partnerships, including a description of different types of partnerships, partnership benefits, eligibility requirements, and how TEA will evaluate applications, please download the Texas Partnerships Guide from the [Texas Partnerships website](#).

TEA will accept applications on a rolling basis, with two priority deadlines and one final deadline. Districts and proposed operating partners must also attend mandatory webinars, and districts must have their local charter authorizing board policy and their local campus application and scoring rubric approved prior to submitting the full benefits application package. Table 1, below, shows the timeline for application package submissions.

Table 1. Application Timeline for Texas Partnerships Benefits

Action	Date
District and proposed operating partner attend required Texas Partnerships Overview webinar	District and partner representatives will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 15, 2025, 3-4:30p• July 22, 2025, 9a-10:30a• September 9, 2025, 3p-4:30p• September 16, 2025, 9a-10:30a
District and proposed operating partner attend required Texas Partnerships Performance Contract webinar	District and partner representatives will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 16, 2025, 3p-4p• July 23, 2025, 9a-10a• September 10, 2025, 3p-4p• September 17, 2025, 9a-10a
District attends required Submitting a Successful Texas Partnerships Application webinar	District representative will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 17, 2025, 3p-4p• July 24, 2025, 9a-10a• September 11, 2025, 3p-4p• September 18, 2025, 9a-10a
District submits non-binding mandatory Letter of Intent to Apply for Texas Partnerships Benefits <i>The deadline to submit the Letter of Intent is the same for all application due dates. TEA will not accept a Texas Partnerships Benefits Application Package from a district unless the</i>	No later than Friday, December 5, 2025, at 5 p.m. (Central Time)

<i>district has completed a Letter of Intent by the required deadline.</i>	
District submits locally-developed charter authorizing policy, local campus partner application, and/or local application scoring rubric OR notifies TEA that the district has adopted TEA models	No later than Friday, December 5, 2025, at 5 p.m. (Central Time), or no later than 5 working days prior to local campus application release (whichever date is earlier)
Texas Partnerships Benefits Application Package Priority Deadline 1 <i>NOTE: Charter School Program Start-Up Grant funding may be available per approval of extensions</i>	Monday, December 15, 2025, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than February 13, 2026)</i>
Texas Partnerships Benefits Application Package Priority Deadline 2 <i>Districts that submit by this date do not have to submit Attachment D: Pre-Opening Checklist and Implementation Plan</i>	Friday, January 30, 2026, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than March 31, 2026)</i>
Texas Partnerships Benefits Application Final Deadline <i>Districts that submit in February or March must include Attachment D: Pre-Opening Checklist and Implementation Plan with their application</i>	Tuesday, March 31, 2026, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than May 29, 2026)</i>

A complete application includes the following documents.

- ☐ Completed Texas Partnership Application Template (this document)
- ☐ Attachment A: Local Board-Approved Charter Authorizing Policy
- ☐ Attachment B1: Local Campus Partner Application (for each partnership school)
- ☐ Attachment B2: Local Campus Partner Application Evidence of Evaluation (for each partnership school)
- ☐ Attachment C: Partnership Performance Contract (for each partnership school)
- ☐ Attachment D: Pre-Opening Checklist and Implementation Plan (for each partnership school; only required if submitting after January 30, 2026)

Districts can submit a single application for multiple partnership schools but must submit separate attachments B and C for each school.

Please submit the completed application package to TEA using the following steps:

- Save this Partnership Application template as a PDF document titled with district name and document type (e.g., *District Name-Partnership Application*), and
- Please save required attachments as PDF documents. See application instructions for file naming convention.
- Email all files to TXP@tea.texas.gov with the subject line as follows - [Texas Partnerships Benefits Application Package District Name].

Specifications

- Applicants **must** submit proposals electronically and use the template provided.
- Only responses placed within the text boxes provided will be considered for evaluation activities.
- Late submissions will not be accepted.
- Submissions from districts that did not submit a letter of intent by Friday, December 5, 2025 will not be accepted.
- Submissions from districts that did not attend all required webinars will not be accepted.
- Submissions that include an operating partner that did not attend all required webinars will not be accepted.
- Submissions that include a partner that does not have a governing board of at least 3 members and at least one full time staff at the time the application package is submitted will not be accepted.

District Information

District Name	Houston Independent School District (HISD)
Superintendent Name	Mike Miles
Superintendent Email and Phone Number	Mike.Miles@houstonisd.org 713-556-6305
Primary District Point of Contact (if different from superintendent)	Orlando Riddick
Primary District Point of Contact Email and Phone Number (if different from superintendent)	Orlando.Riddick@houstonisd.org
Submission Date	March 31, 2026

Operating Partner and Campus Information

Please complete the following information for each operating partner organization. Copy and paste the full table below if this application includes more than one operating partner.

Name of Partner Organization: Click or tap here to enter text.		
Authorizing statute for this partnership¹: §12.0522		
Primary Partner Contact Information		
Name: Orlando Riddick	Role: Chief of Strategic Initiatives	Email: Orlando.Riddick@houstonisd.org
Eligible Organization:		
<i>To be eligible for Texas Partnerships benefits, the district must contract with the governing body of an open-enrollment charter school (authorized by the state of Texas) or an entity that meets the criteria in TEC 12.101(a).</i>		
Organization status: Tax exempt organization under Section 501(c)(3)		
Please describe how the district verified this organization's status: HISD verified the operating partner's eligibility by confirming the organization's legal status as either (1) the governing body of an open-enrollment charter school authorized by the state of Texas, or (2) an entity meeting the criteria in TEC 12.101(a). Verification included review of the partner's formation documents and governance structure, evidence of tax-exempt status where applicable, and confirmation that the organization is eligible to hold and execute a performance contract to operate an in-district charter campus under TEC Chapter 12, Subchapter C. HISD also conducted conflict-of-interest screening aligned to district assurances and required governance independence, including checks to ensure no prohibited overlap with district decision-makers or evaluators.		

¹ District boards may grant charters under Texas Education Code, Chapter 12, Subchapter C in the following ways:

- TEC 12.052: the board grants a charter to parents and teachers of a campus or campus program after receiving a petition from parents and teachers at the campus
- TEC 12.0521: the board grants a charter for a new campus or to an entity that has entered into contract with the district
- TEC 12.0522: the board grants a district charter to a campus (Enrollment at these campuses cannot exceed 15% of the district's total student enrollment unless the campus is a turnaround campus, is part of a feeder pattern of district charters, or the district receives a waiver from the agency. TEA will review attendance counts at fall snapshot to see if the district has exceeded the 15% threshold.)
- TEC 12.053: the board grants a charter to parents and teacher at two or more campuses for a cooperative charter program after receiving a petition from parents and teachers at the campus

Operating Partner Board:

Each operating partner organization must have at least 3 board members. Add rows as needed.

Board Member Name	Position on the board	Email (Required for board president only)
1. HSPVSA - Janis Jarosz	Chair	
HSPVA - Frank Angelle,	Treasurer	
HSPVA - M. Kaye DeWalt	Secretary	
2. Challenge ECHS - Anne McClellan	President	
Challenge ECHS - Justin Fuentes	Treasurer	
Challenge ECHS – Mike Webster	Secretary	
3. Energy - Julie Zachary	TBD	
Energy - Lucie Tredennick	TBD	
Energy - Kathy Kahanek	TBD	
4. HAIS - Jennifer Kapral	TBD	
HAIS - Brian Gaston	TBD	
HAIS - Brenda Rangel	TBD	

Campus Information:

Provide the following information about the campus(es) this partner will manage. If this a new campus for which there is no CDCN, type "new" in the CDCN column. Add rows as needed if this partner will manage multiple campuses in the district.

Campus Name:	County District Campus Number:	Grade levels served in Year 1:	Grade levels served at capacity:
1. Kinder High School for the Visual and Performing Arts (HSPVA)	1. 101912025	1. 9-12	1. 9-12
2. Challenge Early College High School (Challenge ECHS)	2. 101912323	2. 9-12	2. 9-12
3. Energy Institute High School (Energy)	3. 101912468	3. 9-12	3. 9-12
4. Houston Academy for International Studies (HAIS)	4. 101912348	4. 9-12	4.9-12

Operating Partner Staff Member(s) Responsible for Campus Management (including principal evaluation)²:

1. Kinder High School for the Visual and Performing Arts – Dr. Priscilla Rivas (Anticipated Hire Date 7/1/2026)
2. Challenge Early College High School – Jose Santos (Anticipated Hire Date 7/1/2026)
3. Energy Institute High School – Lori Lambropoulos (Anticipated Hire Date 7/1/2026)
4. Houston Academy for International Studies – Melissa Jacobs (Anticipated Hire Date 7/1/2026)

Turnaround Partnership Information

Only required for districts seeking a pause in accountability sanctions under TEC 11.174(f)

² If campus management staff has not yet been hired, enter the anticipated hire date. Texas Partnership benefits will not be awarded until TEA has received verification that the partner organization has hired this staff member. If campus management staff is currently employed by the district, the district must provide evidence (attach to this application) that this staff is:

- under contractual obligation with the operating partner board, and
- solely dedicated to planning the launch of the campus at the time of application for benefits.

1. If any of the operating partners above will manage a turnaround campus (a campus whose most recent accountability rating was an F), please describe the operating partner's prior experience managing campuses. Include how many campuses the partner managed, the number of years they have managed those campuses, and the organization's track record of managing campuses to academic success or significantly improving the academic performance of the campuses.

N/A

Click or tap here to enter text.

2. How did the district define a track record of academic success and/or significant improvement in academic outcomes?

N/A

Click or tap here to enter text.

3. Has this organization successfully turned a campus around in the past (i.e., improved campus performance from an unacceptable rating to an A, B, or C rating)? If yes, please describe. If no, please describe how the district evaluated the partner organization's ability to successfully execute a turnaround strategy at the district campus.

N/A

Click or tap here to enter text.

Charter Authorizing Policies and Practices

Districts seeking approval for partnership benefits must provide evidence of high-quality district charter authorizing policies and practices. Districts must submit their local, board-approved partnership authorizing policy as attachment A to this application. Districts must also respond to the questions below.

Required:

- **Attachment A:** Local Charter Authorizing Policy (*as currently adopted by local district school board*). Districts are required to adopt TEA's Model Local Charter Authorizing Policy or a similar policy approved by TEA. If the district is not using the Model Local Charter Authorizing Policy, the district's policy must be approved before the agency (by December 4, 2023 or no later than 5 working days prior to local campus application release, whichever is earlier).
- **Respond to** questions in the Summary of Charter Authorization Policies and Practices below.

Summary of Charter Authorizing Policies and Practices

All districts must respond to the following questions about their local authorizing policies and practices. All questions under each section must be addressed. **Answers must explain the contents of the district board policy or the performance contract; copy and pasting sections of the board policy or contract is insufficient.**

Authorizing Mission and Core Vision

1. Describe the mission and vision of the district's efforts to authorize new charter campuses and programs.

HISD's work to authorize in-district charter campuses is grounded in a clear district vision and mission. The vision is to establish high-quality autonomous schools that expand choice and prepare every student for the 2035 workplace and world. The mission is to expand high-quality autonomous schools that increase choice, foster innovation, and strengthen student outcomes.

In service of this vision, HISD's approach to authorizing charter campuses is to expand and sustain high-quality learning options by pairing meaningful school-level autonomy with rigorous, enforceable accountability for student outcomes and equity. This work is grounded in a Defined to Earned Autonomy Framework, in which autonomy is earned and intentionally structured so campuses can control the core variables needed to deliver their educational model, while the district maintains clear guardrails that protect students, ensure compliance, and preserve system coherence.

This approach enables innovation and specialized programming while avoiding the inequities and inefficiencies that can result from autonomy without strong accountability. The framework establishes a performance-based pathway in which higher-performing campuses may qualify for Level 5 autonomy, ensuring that autonomy is awarded intentionally and sustained only when student outcomes and equity commitments remain strong.

Consistent with EL(LOCAL), HISD recognizes external partnerships for educational services (Texas Partnerships) as External Performance Contract Campuses operated under a Board-approved performance contract. These campuses are exempt from instructional and academic rules and Board policies except as specified in the contract, allowing for increased flexibility while maintaining clear expectations for performance and accountability.

- 2. Explain how work to authorize new charter campuses will focus on improving student learning, increasing choice, creating professional opportunities to attract teachers, establishing new forms of accountability, and encouraging innovative learning methods.**

HISD's authorizing approach improves learning by requiring explicit student outcome goals, progress monitoring, and consequences for underperformance through the performance contract. It increases choice by enabling distinct campus models and specialized programming to operate within HISD through authorized in-district charters. It supports professional opportunities by allowing the operating partner to implement its instructional program and campus operating model, including staffing, scheduling, and professional learning routines, within applicable law and contract guardrails. It establishes new forms of accountability by tying renewal and continuation to measurable performance targets, including required reporting and improvement planning when targets are not met. It encourages innovation by granting exemptions to the fullest extent permitted under TEC Chapter 12, Subchapter C, while maintaining a small set of non-negotiable district parameters (such as compliance requirements, calendar, assessments, and instructional expectations that ensure TEKS coverage and student safety). Under the *Earned Autonomy Framework*, Level 5 autonomy is reserved for campuses demonstrating sustained excellence and equity, which strengthens accountability by connecting the highest levels of flexibility to verified performance and narrowing achievement gaps, not merely to compliance with processes.

In alignment with EL(LOCAL), HISD's application and approval process includes a comprehensive written application, a rigorous review by a review committee with conflict-of-interest checks, a capacity interview with partner representatives, superintendent recommendation, and Board approval by vote, ensuring innovation is paired with documented readiness and public governance.

- 3. Explain how the district's efforts to authorize new charter campuses will support the district's broader strategy to improve student outcomes.**

HISD's broader strategy is to raise student achievement, narrow achievement gaps, and prepare students for future success while maintaining strong oversight and equity safeguards. SB 1882 partnerships support this strategy by enabling high-performing and unique schools to gain additional autonomy (including a Level 5 autonomy approach for qualifying campuses) while maintaining clear district parameters and enforceable performance expectations. Through the performance contract, HISD aligns autonomy to accountability, ensuring that innovative campus models contribute to systemwide improvement without compromising compliance, student protections, or fiscal stewardship. HISD's *Level 5 Earned Autonomy Framework* operationalizes this strategy by setting objective entry criteria for expanded autonomy (sustained "A" accountability performance and controlled achievement gaps) and requiring continued performance and gap reduction targets over the contract term, ensuring the partnership advances both excellence and equity districtwide.

Commitment and Capacity

- 1. Describe the capacity and resources dedicated to the district's charter authorizing process, including the evaluation, nomination, and ongoing monitoring of district charter campuses.**

HISD has established a cross-functional authorizing structure to ensure rigorous evaluation, effective oversight, and consistent enforcement of performance contracts. The Chief of Strategic Initiatives leads the district's authorizing work, including application evaluation, performance monitoring, and partnership oversight. The Superintendent provides final approval recommendations and ensures alignment with district

strategy, and the Board of Managers approves all performance contracts as well as renewal and non-renewal decisions. HISD's authorizing work is supported through a matrixed structure that includes dedicated leadership and functional expertise across key departments. Legal Services supports contract development and compliance enforcement. The Finance team provides financial oversight, including budget monitoring and audit alignment. Academic teams support monitoring of instructional performance and student outcomes. Operations teams support facilities, staffing, and operational compliance. This structure allows HISD to apply domain-specific expertise to each component of the authorizing process while maintaining clear accountability for overall performance. The model enables consistent monitoring across multiple campuses, ensures that performance expectations are enforced with fidelity, and provides the capacity necessary to sustain high-quality authorizing practices over time.

2. Identify the key members of the district's leadership team by name and title and describe their individual and collective qualifications for authorizing, monitoring, and evaluating the district charter(s).

Mike Miles, Superintendent, provides executive leadership and ensures partnerships align to HISD's mission, defined to earned autonomy parameters, and performance expectations. Orlando Riddick, Chief of Strategic Initiatives, serves as the district point of contact and leads the authorizing process, cross-department coordination, and the monitoring structure aligned to the performance contract. HISD Legal Services supports statutory alignment, contract compliance, and enforceable remedies. HISD Finance supports fiscal stewardship, reporting requirements, and audit-aligned controls. HISD academics and school support functions support performance monitoring, progress reporting, and compliance with state and federal program requirements. Collectively, this team brings expertise in governance, contract management, accountability systems, operational readiness, and compliance.

3. Identify the district employee(s) that is/are fully dedicated to overseeing the authorizing and ongoing monitoring of in-district charters, including the date the employee(s) began in this role.

Orlando Riddick, Chief of Strategic Initiatives, and Caitlin Butler, Deputy Chief of staff, oversee the authorizing and ongoing monitoring of in-district charters, including coordination, evaluation, communication, consultation, contracting alignment, and implementation oversight. Performance and contractual oversight support is provided by Legal Services, Finance, Academics, and Operations to execute autonomy, monitoring, compliance, and reporting expectations defined in the performance contract. He began his role as Chief of Strategic Initiatives October of 2026, and Caitlin Butler began her role in support of SB1882 partners in November of 2026.

Application and Review Process

1. Describe the process for evaluating and awarding proposals submitted under TEC Chapter 12, Subchapter C. Please include a description of:

- **the questions asked in the operator application (if the district used the TEA model application, please indicate in this section),**
 1. HISD evaluated proposals through a structured process using the TEA Cycle 9 Local Campus Partner Application model. Applicants completed the local campus partners application (TEA model-aligned), which requires clear evidence of the academic model, governance and decision

rights, staffing and operational plan, financial plan and controls, compliance readiness, and measurable performance commitments.

- **the rubric used by the district’s review panel to evaluate partner applications, including how the district evaluated the operating partner’s academic model, the operator’s strengths and weaknesses and past academic performance, and**

1. A district review panel evaluates each application using TEA’s scoring rubric that assesses the strength of the academic model, organizational capacity, governance, financial stewardship, and operational readiness, including identification of strengths, weaknesses, and risk areas.

- **the process the district used for conducting capacity interviews.**

1. HISD evaluates proposals through a structured local process. Applicants complete the local campus partners application (TEA model-aligned), which requires clear evidence of the academic model, governance and decision rights, staffing and operational plan, financial plan and controls, compliance readiness, and measurable performance commitments.

2. A district review panel from the Chief of Strategic Initiatives, Chief of Staff, Chief of Schools, Central Division offices along with a representative from Regio 4’s Education Service Center evaluated each application using TEA’s scoring rubric that assesses the strength of the academic model, organizational capacity, governance, financial stewardship, and operational readiness, including identification of strengths, weaknesses, and risk areas.

3. HISD then conducts capacity interviews to validate written evidence, test implementation feasibility, clarify governance and autonomy practices, and confirm the operating partner can meet the performance contract’s academic, governance, financial, and compliance requirements. A team from the Chief of Strategic Initiatives, Chief of Staff, Chief of Schools, and Central Division offices along with a member from the Region 4’s Education Service Center met to conduct these interviews. Final award decisions are aligned to evidence and readiness to deliver outcomes under contract-based accountability.

2. Describe the process undertaken to provide opportunities for the public to learn about potential charter applications prior to approval decisions by the local board.

Community engagement for the SB 1882 partnerships was intentional, campus-led, and ongoing throughout the development of the applications and contract discussions. Each campus hosted community meetings to provide partnership updates, share the purpose and scope of the performance contract, and receive feedback from families and stakeholders. Engagement also included administrator and teacher leader meetings, campus-wide teacher meetings, and regularly scheduled site-based decision-making team meetings to ensure staff voice and alignment on the proposed autonomy, supports, and accountability expectations. Campuses also leveraged existing family engagement structures through Parent Teacher Organization (PTO) and Parent Teacher and Student Association (PTSA) meetings, as well as informal “coffee with the principal,” to expand access for working families and ensure two-way communication. To keep parents informed between meetings, campuses used ParentSquare, the district and campus messaging system, to provide timely updates, share meeting information and materials, and maintain consistent communication as partnership planning progressed.

HISD provided opportunities for the public to learn about proposed partnerships through required board action processes conducted under open meetings requirements, including agenda publication and public notice in advance of authorization and performance contract approval. HISD also ensured that board materials and district communications provided stakeholders with visibility into the purpose of the partnership,

governance structure, and the accountability commitments included in the performance contract prior to final action.

3. Describe the process for communicating application evaluation criteria and approval/denial decisions, including the basis for such decisions, to charter applicants.

HISD communicated application evaluation criteria and approval/denial decisions through a transparent, structured process with frequent, documented touchpoints. Evaluation criteria were provided in advance through the published district application and scoring rubric, and each partnership received ongoing rubric-aligned feedback throughout development to clarify expectations and strengthen evidence prior to final decisions. Communication occurred through standing weekly 1:1 meetings with each partnership and its leadership team to review progress against the criteria, address questions, and confirm required deliverables. In addition, HISD facilitated weekly whole-group partnership meetings with all partners to reinforce common expectations, timelines, and evaluation standards, as well as a weekly interoffice huddle with cross-department leaders to ensure consistent guidance and alignment across academics, finance, operations, legal, and communications. Progress, evaluation findings, and decision points were also reviewed in bi-weekly meetings with central office leadership, and Superintendent Miles received regular briefings on partnership progress and deliverables through Monday cabinet updates. Where applicable, partners also received timely feedback through TEA office hours to resolve technical questions and ensure submissions aligned to state requirements. Collectively, these routines ensured that partners understood the evaluation criteria, received clear feedback tied to those criteria, and were informed of approval conditions or denial rationale based on documented evidence and readiness to execute under the performance contract.

In addition, HISD communicated application requirements and evaluation criteria through the published application and scoring rubric. Following evaluation, HISD provided applicants with rubric-anchored feedback and capacity interview findings, including documented strengths, weaknesses, and any conditions required to proceed to contracting. Approval or denial decisions are grounded in evidence of academic model strength, capacity to implement, governance readiness, financial controls, compliance readiness, and the ability to meet measurable performance targets under the contract.

Oversight and Evaluation

1. Describe the relationship and key responsibilities between the school district board of trustees, the district administration, and the charter holder/operating partner.

The HISD Board of Managers, and successor governance structure as applicable, retains authorization authority and approves the partnership charter and performance contract. District administration implements the authorizing policy, conducts monitoring and compliance oversight, and enforces performance contract terms and remedies. The operating partner operates as an independent contractor responsible for day-to-day campus operation and implementation of the educational model within the autonomy granted by the contract and applicable law, including governance through its own board. The performance contract defines responsibilities, reporting requirements, and consequences to ensure transparency and accountability. Consistent with EL(LOCAL), the Board's role includes approval of the external performance contract for each campus and oversight decisions related to renewal, probation, and termination based on academic, financial, operational, and governance standards set forth in the performance contract.

2. Describe the areas of autonomy and flexibility provided to charter campuses in the district. Specifically, identify district policies that will be identified in the performance contract as being applicable to the

charter campus for which the campus could otherwise be exempt under TEC, Chapter 12, Subchapter C.

HISD grants autonomy in a manner consistent with TEC Chapter 12, Subchapter C, and the performance contract, with the school exempt from laws and rules to the fullest extent allowed and exempt from district policies except those specifically identified as applicable in the agreement. HISD's approach aligns to the Earned Autonomy Framework: autonomy is earned and structured so the campus can control the key variables that produce the desired model and outcomes, while maintaining non-negotiable parameters that protect students and preserve system coherence. Those parameters include compliance with board policy, as agreed upon and or updated by the OP, and state and federal law. The OP has full autonomy over areas such as; the district calendar, districtwide assessments, district oversight, district compliance requirements, and instructional expectations. Within these guardrails, the operating partner has broad decision rights over school operations and the instructional program, including program design, curriculum decisions beyond minimum state requirements, instructional delivery model, master schedule, staffing, budget planning, purchased services as specified in the contract, staffing, and facility. For Level 5 earned autonomy campuses, HISD's Earned Autonomy Framework establishes objective performance-based thresholds and ongoing expectations that preserve autonomy: eligibility is tied to sustained "A" performance and defined limits on achievement gaps, and continued autonomy is contingent on maintaining an "A" rating and reducing the achievement gaps between black and white students and Hispanic and white students in math and reading to the contract's required target over the term of the contract. Per EL(LOCAL), once an external performance contract is granted, the campus is exempt from Board policies except those specified in the performance contract; accordingly, the contract will include a list of District policies with which the campus must comply, including, at minimum: FFH(LOCAL), DAA(LOCAL), DBAA(LOCAL), DI(LOCAL), DIA(LEGAL) and DIA(LOCAL), DG(LEGAL), DGA(LEGAL) and DGA(LOCAL), FFI(LEGAL) and FFI(LOCAL), CQ(LEGAL) and CQ(LOCAL), and AE(LOCAL) limited to the sections "Goals and Progress Measures" and "Constraints and Constraint Progress Measures."

3. Describe the district's process for routinely monitoring accountability and compliance, as defined in the charter contract. Include the frequency and timeline for all monitoring activities.

HISD implements a structured, performance-driven oversight system to ensure that school-level autonomy is consistently matched with accountability for student outcomes, financial stewardship, and operational execution. Oversight is grounded in the performance contract and operates on a defined cadence with clear performance triggers and corresponding actions.

HISD conducts monthly internal monitoring of leading indicators, including student attendance, enrollment stability, staffing levels, and interim assessment data. These reviews are conducted by the operating partner and campus leadership, with required submission of key data to the district for review.

HISD conducts quarterly formal performance reviews to assess progress toward annual contract goals. These reviews include analysis of academic performance (interim assessments and course outcomes), financial performance (budget-to-actuals and expenditure tracking), and operational metrics (staff retention and enrollment stability). Findings from each quarterly review are documented and used to determine whether the campus is on track to meet annual performance targets.

Operating partners are required to submit mid-year (January) and end-of-year (June) performance reports to the Superintendent. These reports include comprehensive updates on academic outcomes, financial health, staffing, and implementation of the approved school model.

HISD conducts an annual accountability review aligned to state accountability outcomes and contract-specific performance goals. Based on this review, campuses may continue in good standing, be placed on an improvement plan, or enter a probationary status.

Clear performance triggers guide district action. Failure to meet interim growth targets in two consecutive quarters results in a required improvement plan. Failure to meet annual performance targets may result in probationary status and increased monitoring. Material financial variances greater than 10 percent from the approved budget without justification result in a required financial review and corrective action plan. Operational concerns, including elevated staff vacancy rates or enrollment instability, may trigger targeted intervention and escalation of oversight.

All monitoring activities, findings, and required actions are formally documented to ensure transparency and alignment with contract enforcement.

4. Outline any district data collection requirements, including a reporting schedule, site-visits, mandated assessments, and any required student-management system.

HISD requires consistent and standardized data collection and reporting to ensure effective oversight, informed decision-making, and compliance with all state and federal requirements.

Operating partners are required to utilize district-approved student information systems and data platforms and must submit all required data in alignment with PEIMS timelines and state reporting requirements. All state and district assessments must be administered in accordance with district expectations.

Operating partners must submit data according to the following cadence: monthly submission of key operational and leading indicator metrics, quarterly submission of academic, financial, and operational performance reports, and bi-annual submission of comprehensive mid-year and end-of-year performance reports. HISD conducts a full annual accountability and compliance review aligned to state accountability outcomes and contract expectations.

HISD conducts at least one formal monitoring site visit annually, with additional visits conducted as needed based on performance. Site visits include classroom observations, leadership meetings, and review of compliance and operational practices.

This data collection and reporting structure ensures that HISD maintains real-time visibility into campus performance and can take timely and appropriate action when performance concerns arise.

Revocation and Renewal

1. Describe the charter terms and evidence required for renewal of a charter agreement.

HISD utilizes a performance-based renewal process to determine whether a partnership contract will be extended. Renewal decisions are grounded in objective performance outcomes, compliance with contractual obligations, and sustained implementation of the approved school model.

To be eligible for renewal, campuses must demonstrate strong academic performance, including meeting or exceeding state accountability standards and contract-specific performance goals. Campuses must also demonstrate measurable progress in student outcomes, including both achievement and growth. In addition, campuses must maintain sound financial practices, including responsible budget management and successful completion of required audits, and must remain in full compliance with all legal, reporting, and contractual requirements.

HISD initiates the renewal process during Year 4 of the contract term, beginning with a preliminary review of performance trends and risk indicators. If performance concerns are identified, the district provides formal notification and may require additional monitoring or intervention. A final performance evaluation is conducted during Year 5, and a renewal recommendation is developed based on cumulative performance over the contract term.

HISD provides formal notice of renewal or non-renewal no later than April 1 of the final contract year, in accordance with state requirements. Renewal decisions are based on sustained performance over time rather than a single year of results.

2. Describe the criteria and a specific timeline for non-renewal of a charter agreement.

A campus may be subject to non-renewal if it fails to meet academic performance expectations over the course of the contract term, demonstrates persistent performance deficiencies despite intervention, or fails to meet financial or compliance requirements.

HISD identifies campuses at risk of non-renewal through its ongoing monitoring processes and provides notice and opportunity for improvement prior to making a final determination. If performance concerns persist, the district issues formal notification of non-renewal risk during Year 4 of the contract term.

Formal notice of intent not to renew is provided no later than April 1 of the final contract year, in alignment with state requirements and contract terms.

3. Describe the process for establishment of a closure protocol to be used in the event of non-renewal of a charter agreement.

HISD establishes a closure and transition protocol to ensure continuity of services, protection of student rights, and orderly transfer of operations. The protocol includes family communications, continuity planning for students requiring special services, records transfer consistent with law, inventory and asset reconciliation, staffing transition planning, and a defined operational handoff plan to minimize disruption. The district may require transition cooperation and documentation to ensure students experience minimal disruption and compliance obligations are fully met.

4. Describe the criteria for revocation of a charter agreement.

In cases of potential revocation, HISD follows a structured, contract-aligned process to ensure due process and timely intervention.

Upon identification of a material issue, HISD issues a formal notice of concern outlining the specific deficiencies and required corrective actions. The operating partner is provided a defined cure period, typically ranging from 30 to 90 days depending on the severity of the issue.

Following the cure period, HISD conducts a follow-up review to assess whether corrective actions have been successfully implemented. If deficiencies are not resolved, the district may proceed with termination of the contract in accordance with contract provisions.

When feasible, termination is structured to occur at the end of the school year to minimize disruption to students. All actions are documented to ensure transparency and alignment with legal and contractual requirements.

5. Describe the procedure and a specific timeline for revocation of a charter agreement.

HISD follows the performance contract's termination provisions, including written notice of material breach and an opportunity to cure within the timeframe established in the contract, except when the breach affects student safety or well-being or is not reasonably capable of being cured. If deficiencies are not remedied, HISD may terminate the agreement consistent with contract terms, including termination effective at the end of the then-current school year when required timelines are met. HISD documents findings, required corrective actions, and final determinations to ensure transparency and compliance with governing requirements.

Local Campus Partner Application and Evidence of Evaluation

Districts must submit this attachment for **each partnership school** under consideration for Partnership School benefits.

Districts must submit two items:

- **Attachment B1: Local Campus Partner Application:** The application that the partner organization completed and submitted to the district review panel for evaluation.
- **Attachment B2: Local Campus Partner Application Evidence of Evaluation:** The evidence that the district review panel thoroughly evaluates the proposal from the potential operator. This includes documents that demonstrate how the application was evaluated/scored, what areas needed to be addressed in the capacity interview, and notes from the capacity interview.

Attachments should be titled and ordered by partnership school/campus name. For example, a district submitting two partnerships for approval would title attachments as follows:

- Campus 1_Attachment B1_Local Campus Partner Application
- Campus 2_Attachment B1_Local Campus Partner Application
- Campus 1_Attachment B2_Local Campus Partner Application Evidence of Evaluation
- Campus 2_Attachment B2_Local Campus Partner Application Evidence of Evaluation

Partnership Performance Contract

Districts must submit this attachment for **each partnership school** under consideration for Partnership School benefits.

Attachment C: Partnership Performance Contract: the board-approved contract between school district and partner organization to operate the partnership school.

Attachments should be titled and ordered by partnership school/campus name. For example, a district submitting two partnerships for approval would title attachments as follows:

- Campus 1_Attachment C_Partnership Performance Contract
- Campus 2_Attachment C_Partnership Performance Contract

Partnership Assurances Documentation

The partnership assurances document serves as a commitment from the district superintendent and board of trustees that all proposed partnerships do not present a conflict of interest with the district and that the district has done its due diligence to ensure that each partner is capable of the work it has agreed to perform in the performance contract. TEA will monitor continued adherence to these assurances while the partnerships received Texas Partnership benefits.

The Superintendent of the district shall initial each and all assurances within this document to confirm awareness and understanding of responsibilities established herein.

I. Governance

JMM The district assures that the governing body of each operating partner is not and shall not be comprised of any members of the independent school district's board of trustees, the superintendent, or staff responsible for evaluating the partnership application or overseeing the performance contract.

JMM The district assures that the majority of the governing body of each operating partner is not comprised of district staff.

JMM The district assures that no member of the governing body of each partner will be related within the first degree of affinity or consanguinity with any members of the independent school district's board of trustees, the superintendent, or staff responsible for granting the charter or contract to partner to operate or overseeing the performance contract.

JMM The district assures that all members of the governing body of each operating partner have passed and will continually pass the district's conflict of interest checks.

JMM The district assures that the district has not appointed a majority of the members of the governing board of each operating partner.

JMM The district assures that the governing body of the operating partner will participate in board governance training provided by TEA, or a vendor recommended by TEA.

JMM The district assures that it will submit the names and background information for all partner board members to the agency annually.

II. Performance Contract

JMM The district assures that the district and each proposed operating partner meet the requirements to contract to partner to operate, as outlined in TAC §97.1075 (relating to Contracting to Partner to Operate a Campus under Texas Education Code, §11.174, as amended).

JMM The district assures that the district is aware that to maintain benefits eligibility, the performance contract must meet the eligibility requirements described in this application and all

statutory requirements for the duration of the partnership, and that all performance contract amendments must be submitted to the agency within 30 days.

III. Authorizing Policies and Practices

JMM The district assures that it will continuously meet the requirements to authorize an operating partner, as outlined in TAC §97.1079 (relating to Determination Processes and Criteria for Eligible Entity Approval under Texas Education Code §11.174, as amended).

JMM The district assures that it will not authorize performance contracts to partner to operate a campus that are contingent upon overall campus academic performance ratings, or the receipt of additional funding relate to TEC §11.174.

IV. Operating Partner Capacity

JMM The district assures that each operating partner has reasonable staff capacity, including at least one full-time equivalent employee in place at the time this application is submitted, necessary to oversee the operation of the campus(s).

I, the undersigned, hereby certify that the district has authorized me to provide these assurances as noted by my initials on this and all previous pages.

F. Mike Miles

Printed Name of District Superintendent

JMM

Signature of District Superintendent

03-26-2026

Date

Ric Campo

Printed Name of President (Board of Trustees)

RC

Signature of President (Board of Trustees)

03-26-2026

Date

A background image showing a group of diverse children and a teacher. On the left, two young boys are looking towards the right. In the center and right, a group of children and a woman with glasses (the teacher) are gathered around a table, looking at a laptop screen. The scene is brightly lit, suggesting a classroom or meeting environment.

Texas Partnerships Benefits Application

For Texas Partnerships Benefits that begin in the 2026-2027 school year



TEXAS PARTNERSHIPS (SB 1882) BENEFITS APPLICATION

For Texas Partnerships Benefits that begin in the 2026-2027 school year

Application Instructions

This document is the application for Texas Partnerships (SB 1882) benefits. For more information about Texas Partnerships, including a description of different types of partnerships, partnership benefits, eligibility requirements, and how TEA will evaluate applications, please download the Texas Partnerships Guide from the [Texas Partnerships website](#).

TEA will accept applications on a rolling basis, with two priority deadlines and one final deadline. Districts and proposed operating partners must also attend mandatory webinars, and districts must have their local charter authorizing board policy and their local campus application and scoring rubric approved prior to submitting the full benefits application package. Table 1, below, shows the timeline for application package submissions.

Table 1. Application Timeline for Texas Partnerships Benefits

Action	Date
District and proposed operating partner attend required Texas Partnerships Overview webinar	District and partner representatives will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 15, 2025, 3-4:30p• July 22, 2025, 9a-10:30a• September 9, 2025, 3p-4:30p• September 16, 2025, 9a-10:30a
District and proposed operating partner attend required Texas Partnerships Performance Contract webinar	District and partner representatives will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 16, 2025, 3p-4p• July 23, 2025, 9a-10a• September 10, 2025, 3p-4p• September 17, 2025, 9a-10a
District attends required Submitting a Successful Texas Partnerships Application webinar	District representative will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 17, 2025, 3p-4p• July 24, 2025, 9a-10a• September 11, 2025, 3p-4p• September 18, 2025, 9a-10a
District submits non-binding mandatory Letter of Intent to Apply for Texas Partnerships Benefits <i>The deadline to submit the Letter of Intent is the same for all application due dates. TEA will not accept a Texas Partnerships Benefits Application Package from a district unless the</i>	No later than Friday, December 5, 2025, at 5 p.m. (Central Time)

<i>district has completed a Letter of Intent by the required deadline.</i>	
District submits locally-developed charter authorizing policy, local campus partner application, and/or local application scoring rubric OR notifies TEA that the district has adopted TEA models	No later than Friday, December 5, 2025, at 5 p.m. (Central Time), or no later than 5 working days prior to local campus application release (whichever date is earlier)
Texas Partnerships Benefits Application Package Priority Deadline 1 <i>NOTE: Charter School Program Start-Up Grant funding may be available per approval of extensions</i>	Monday, December 15, 2025, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than February 13, 2026)</i>
Texas Partnerships Benefits Application Package Priority Deadline 2 <i>Districts that submit by this date do not have to submit Attachment D: Pre-Opening Checklist and Implementation Plan</i>	Friday, January 30, 2026, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than March 31, 2026)</i>
Texas Partnerships Benefits Application Final Deadline <i>Districts that submit in February or March must include Attachment D: Pre-Opening Checklist and Implementation Plan with their application</i>	Tuesday, March 31, 2026, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than May 29, 2026)</i>

A complete application includes the following documents.

- ☐ Completed Texas Partnership Application Template (this document)
- ☐ Attachment A: Local Board-Approved Charter Authorizing Policy
- ☐ Attachment B1: Local Campus Partner Application (for each partnership school)
- ☐ Attachment B2: Local Campus Partner Application Evidence of Evaluation (for each partnership school)
- ☐ Attachment C: Partnership Performance Contract (for each partnership school)
- ☐ Attachment D: Pre-Opening Checklist and Implementation Plan (for each partnership school; only required if submitting after January 30, 2026)

Districts can submit a single application for multiple partnership schools but must submit separate attachments B and C for each school.

Please submit the completed application package to TEA using the following steps:

- Save this Partnership Application template as a PDF document titled with district name and document type (e.g., *District Name-Partnership Application*), and
- Please save required attachments as PDF documents. See application instructions for file naming convention.
- Email all files to TXP@tea.texas.gov with the subject line as follows - [Texas Partnerships Benefits Application Package District Name].

Specifications

- Applicants **must** submit proposals electronically and use the template provided.
- Only responses placed within the text boxes provided will be considered for evaluation activities.
- Late submissions will not be accepted.
- Submissions from districts that did not submit a letter of intent by Friday, December 5, 2025 will not be accepted.
- Submissions from districts that did not attend all required webinars will not be accepted.
- Submissions that include an operating partner that did not attend all required webinars will not be accepted.
- Submissions that include a partner that does not have a governing board of at least 3 members and at least one full time staff at the time the application package is submitted will not be accepted.

District Information

District Name	Houston Independent School District (HISD)
Superintendent Name	Mike Miles
Superintendent Email and Phone Number	Mike.Miles@houstonisd.org 713-556-6305
Primary District Point of Contact (if different from superintendent)	Orlando Riddick
Primary District Point of Contact Email and Phone Number (if different from superintendent)	Orlando.Riddick@houstonisd.org
Submission Date	March 31, 2026

Operating Partner and Campus Information

Please complete the following information for each operating partner organization. Copy and paste the full table below if this application includes more than one operating partner.

Name of Partner Organization: Click or tap here to enter text.		
Authorizing statute for this partnership¹: §12.0522		
Primary Partner Contact Information		
Name: Orlando Riddick	Role: Chief of Strategic Initiatives	Email: Orlando.Riddick@houstonisd.org
Eligible Organization:		
<i>To be eligible for Texas Partnerships benefits, the district must contract with the governing body of an open-enrollment charter school (authorized by the state of Texas) or an entity that meets the criteria in TEC 12.101(a).</i>		
Organization status: Tax exempt organization under Section 501(c)(3)		
Please describe how the district verified this organization's status: HISD verified the operating partner's eligibility by confirming the organization's legal status as either (1) the governing body of an open-enrollment charter school authorized by the state of Texas, or (2) an entity meeting the criteria in TEC 12.101(a). Verification included review of the partner's formation documents and governance structure, evidence of tax-exempt status where applicable, and confirmation that the organization is eligible to hold and execute a performance contract to operate an in-district charter campus under TEC Chapter 12, Subchapter C. HISD also conducted conflict-of-interest screening aligned to district assurances and required governance independence, including checks to ensure no prohibited overlap with district decision-makers or evaluators.		

¹ District boards may grant charters under Texas Education Code, Chapter 12, Subchapter C in the following ways:

- TEC 12.052: the board grants a charter to parents and teachers of a campus or campus program after receiving a petition from parents and teachers at the campus
- TEC 12.0521: the board grants a charter for a new campus or to an entity that has entered into contract with the district
- TEC 12.0522: the board grants a district charter to a campus (Enrollment at these campuses cannot exceed 15% of the district's total student enrollment unless the campus is a turnaround campus, is part of a feeder pattern of district charters, or the district receives a waiver from the agency. TEA will review attendance counts at fall snapshot to see if the district has exceeded the 15% threshold.)
- TEC 12.053: the board grants a charter to parents and teacher at two or more campuses for a cooperative charter program after receiving a petition from parents and teachers at the campus

Operating Partner Board:

Each operating partner organization must have at least 3 board members. Add rows as needed.

Board Member Name	Position on the board	Email (Required for board president only)
1. HSPVSA - Janis Jarosz	Chair	
HSPVA - Frank Angelle,	Treasurer	
HSPVA - M. Kaye DeWalt	Secretary	
2. Challenge ECHS - Anne McClellan	President	
Challenge ECHS - Justin Fuentes	Treasurer	
Challenge ECHS – Mike Webster	Secretary	
3. Energy - Julie Zachary	TBD	
Energy - Lucie Tredennick	TBD	
Energy - Kathy Kahanek	TBD	
4. HAIS - Jennifer Kapral	TBD	
HAIS - Brian Gaston	TBD	
HAIS - Brenda Rangel	TBD	

Campus Information:

Provide the following information about the campus(es) this partner will manage. If this a new campus for which there is no CDCN, type "new" in the CDCN column. Add rows as needed if this partner will manage multiple campuses in the district.

Campus Name:	County District Campus Number:	Grade levels served in Year 1:	Grade levels served at capacity:
1. Kinder High School for the Visual and Performing Arts (HSPVA)	1. 101912025	1. 9-12	1. 9-12
2. Challenge Early College High School (Challenge ECHS)	2. 101912323	2. 9-12	2. 9-12
3. Energy Institute High School (Energy)	3. 101912468	3. 9-12	3. 9-12
4. Houston Academy for International Studies (HAIS)	4. 101912348	4. 9-12	4.9-12

Operating Partner Staff Member(s) Responsible for Campus Management (including principal evaluation)²:

- Kinder High School for the Visual and Performing Arts – Dr. Priscilla Rivas (Anticipated Hire Date 7/1/2026)
- Challenge Early College High School – Jose Santos (Anticipated Hire Date 7/1/2026)
- Energy Institute High School – Lori Lambropoulos (Anticipated Hire Date 7/1/2026)
- Houston Academy for International Studies – Melissa Jacobs (Anticipated Hire Date 7/1/2026)

Turnaround Partnership Information

Only required for districts seeking a pause in accountability sanctions under TEC 11.174(f)

² If campus management staff has not yet been hired, enter the anticipated hire date. Texas Partnership benefits will not be awarded until TEA has received verification that the partner organization has hired this staff member. If campus management staff is currently employed by the district, the district must provide evidence (attach to this application) that this staff is:

- under contractual obligation with the operating partner board, and
- solely dedicated to planning the launch of the campus at the time of application for benefits.

1. If any of the operating partners above will manage a turnaround campus (a campus whose most recent accountability rating was an F), please describe the operating partner's prior experience managing campuses. Include how many campuses the partner managed, the number of years they have managed those campuses, and the organization's track record of managing campuses to academic success or significantly improving the academic performance of the campuses.

N/A

Click or tap here to enter text.

2. How did the district define a track record of academic success and/or significant improvement in academic outcomes?

N/A

Click or tap here to enter text.

3. Has this organization successfully turned a campus around in the past (i.e., improved campus performance from an unacceptable rating to an A, B, or C rating)? If yes, please describe. If no, please describe how the district evaluated the partner organization's ability to successfully execute a turnaround strategy at the district campus.

N/A

Click or tap here to enter text.

Charter Authorizing Policies and Practices

Districts seeking approval for partnership benefits must provide evidence of high-quality district charter authorizing policies and practices. Districts must submit their local, board-approved partnership authorizing policy as attachment A to this application. Districts must also respond to the questions below.

Required:

- **Attachment A:** Local Charter Authorizing Policy (*as currently adopted by local district school board*). Districts are required to adopt TEA's Model Local Charter Authorizing Policy or a similar policy approved by TEA. If the district is not using the Model Local Charter Authorizing Policy, the district's policy must be approved before the agency (by December 4, 2023 or no later than 5 working days prior to local campus application release, whichever is earlier).
- **Respond to** questions in the Summary of Charter Authorization Policies and Practices below.

Summary of Charter Authorizing Policies and Practices

All districts must respond to the following questions about their local authorizing policies and practices. All questions under each section must be addressed. **Answers must explain the contents of the district board policy or the performance contract; copy and pasting sections of the board policy or contract is insufficient.**

Authorizing Mission and Core Vision

1. Describe the mission and vision of the district's efforts to authorize new charter campuses and programs.

HISD's work to authorize in-district charter campuses is grounded in a clear district vision and mission. The vision is to establish high-quality autonomous schools that expand choice and prepare every student for the 2035 workplace and world. The mission is to expand high-quality autonomous schools that increase choice, foster innovation, and strengthen student outcomes.

In service of this vision, HISD's approach to authorizing charter campuses is to expand and sustain high-quality learning options by pairing meaningful school-level autonomy with rigorous, enforceable accountability for student outcomes and equity. This work is grounded in a Defined to Earned Autonomy Framework, in which autonomy is earned and intentionally structured so campuses can control the core variables needed to deliver their educational model, while the district maintains clear guardrails that protect students, ensure compliance, and preserve system coherence.

This approach enables innovation and specialized programming while avoiding the inequities and inefficiencies that can result from autonomy without strong accountability. The framework establishes a performance-based pathway in which higher-performing campuses may qualify for Level 5 autonomy, ensuring that autonomy is awarded intentionally and sustained only when student outcomes and equity commitments remain strong.

Consistent with EL(LOCAL), HISD recognizes external partnerships for educational services (Texas Partnerships) as External Performance Contract Campuses operated under a Board-approved performance contract. These campuses are exempt from instructional and academic rules and Board policies except as specified in the contract, allowing for increased flexibility while maintaining clear expectations for performance and accountability.

- 2. Explain how work to authorize new charter campuses will focus on improving student learning, increasing choice, creating professional opportunities to attract teachers, establishing new forms of accountability, and encouraging innovative learning methods.**

HISD's authorizing approach improves learning by requiring explicit student outcome goals, progress monitoring, and consequences for underperformance through the performance contract. It increases choice by enabling distinct campus models and specialized programming to operate within HISD through authorized in-district charters. It supports professional opportunities by allowing the operating partner to implement its instructional program and campus operating model, including staffing, scheduling, and professional learning routines, within applicable law and contract guardrails. It establishes new forms of accountability by tying renewal and continuation to measurable performance targets, including required reporting and improvement planning when targets are not met. It encourages innovation by granting exemptions to the fullest extent permitted under TEC Chapter 12, Subchapter C, while maintaining a small set of non-negotiable district parameters (such as compliance requirements, calendar, assessments, and instructional expectations that ensure TEKS coverage and student safety). Under the *Earned Autonomy Framework*, Level 5 autonomy is reserved for campuses demonstrating sustained excellence and equity, which strengthens accountability by connecting the highest levels of flexibility to verified performance and narrowing achievement gaps, not merely to compliance with processes.

In alignment with EL(LOCAL), HISD's application and approval process includes a comprehensive written application, a rigorous review by a review committee with conflict-of-interest checks, a capacity interview with partner representatives, superintendent recommendation, and Board approval by vote, ensuring innovation is paired with documented readiness and public governance.

- 3. Explain how the district's efforts to authorize new charter campuses will support the district's broader strategy to improve student outcomes.**

HISD's broader strategy is to raise student achievement, narrow achievement gaps, and prepare students for future success while maintaining strong oversight and equity safeguards. SB 1882 partnerships support this strategy by enabling high-performing and unique schools to gain additional autonomy (including a Level 5 autonomy approach for qualifying campuses) while maintaining clear district parameters and enforceable performance expectations. Through the performance contract, HISD aligns autonomy to accountability, ensuring that innovative campus models contribute to systemwide improvement without compromising compliance, student protections, or fiscal stewardship. HISD's *Level 5 Earned Autonomy Framework* operationalizes this strategy by setting objective entry criteria for expanded autonomy (sustained "A" accountability performance and controlled achievement gaps) and requiring continued performance and gap reduction targets over the contract term, ensuring the partnership advances both excellence and equity districtwide.

Commitment and Capacity

- 1. Describe the capacity and resources dedicated to the district's charter authorizing process, including the evaluation, nomination, and ongoing monitoring of district charter campuses.**

HISD has established a cross-functional authorizing structure to ensure rigorous evaluation, effective oversight, and consistent enforcement of performance contracts. The Chief of Strategic Initiatives leads the district's authorizing work, including application evaluation, performance monitoring, and partnership oversight. The Superintendent provides final approval recommendations and ensures alignment with district

strategy, and the Board of Managers approves all performance contracts as well as renewal and non-renewal decisions. HISD's authorizing work is supported through a matrixed structure that includes dedicated leadership and functional expertise across key departments. Legal Services supports contract development and compliance enforcement. The Finance team provides financial oversight, including budget monitoring and audit alignment. Academic teams support monitoring of instructional performance and student outcomes. Operations teams support facilities, staffing, and operational compliance. This structure allows HISD to apply domain-specific expertise to each component of the authorizing process while maintaining clear accountability for overall performance. The model enables consistent monitoring across multiple campuses, ensures that performance expectations are enforced with fidelity, and provides the capacity necessary to sustain high-quality authorizing practices over time.

2. Identify the key members of the district's leadership team by name and title and describe their individual and collective qualifications for authorizing, monitoring, and evaluating the district charter(s).

Mike Miles, Superintendent, provides executive leadership and ensures partnerships align to HISD's mission, defined to earned autonomy parameters, and performance expectations. Orlando Riddick, Chief of Strategic Initiatives, serves as the district point of contact and leads the authorizing process, cross-department coordination, and the monitoring structure aligned to the performance contract. HISD Legal Services supports statutory alignment, contract compliance, and enforceable remedies. HISD Finance supports fiscal stewardship, reporting requirements, and audit-aligned controls. HISD academics and school support functions support performance monitoring, progress reporting, and compliance with state and federal program requirements. Collectively, this team brings expertise in governance, contract management, accountability systems, operational readiness, and compliance.

3. Identify the district employee(s) that is/are fully dedicated to overseeing the authorizing and ongoing monitoring of in-district charters, including the date the employee(s) began in this role.

Orlando Riddick, Chief of Strategic Initiatives, and Caitlin Butler, Deputy Chief of staff, oversee the authorizing and ongoing monitoring of in-district charters, including coordination, evaluation, communication, consultation, contracting alignment, and implementation oversight. Performance and contractual oversight support is provided by Legal Services, Finance, Academics, and Operations to execute autonomy, monitoring, compliance, and reporting expectations defined in the performance contract. He began his role as Chief of Strategic Initiatives October of 2026, and Caitlin Butler began her role in support of SB1882 partners in November of 2026.

Application and Review Process

1. Describe the process for evaluating and awarding proposals submitted under TEC Chapter 12, Subchapter C. Please include a description of:

- **the questions asked in the operator application (if the district used the TEA model application, please indicate in this section),**
 1. HISD evaluated proposals through a structured process using the TEA Cycle 9 Local Campus Partner Application model. Applicants completed the local campus partners application (TEA model-aligned), which requires clear evidence of the academic model, governance and decision

rights, staffing and operational plan, financial plan and controls, compliance readiness, and measurable performance commitments.

- **the rubric used by the district’s review panel to evaluate partner applications, including how the district evaluated the operating partner’s academic model, the operator’s strengths and weaknesses and past academic performance, and**

1. A district review panel evaluates each application using TEA’s scoring rubric that assesses the strength of the academic model, organizational capacity, governance, financial stewardship, and operational readiness, including identification of strengths, weaknesses, and risk areas.

- **the process the district used for conducting capacity interviews.**

1. HISD evaluates proposals through a structured local process. Applicants complete the local campus partners application (TEA model-aligned), which requires clear evidence of the academic model, governance and decision rights, staffing and operational plan, financial plan and controls, compliance readiness, and measurable performance commitments.

2. A district review panel from the Chief of Strategic Initiatives, Chief of Staff, Chief of Schools, Central Division offices along with a representative from Regio 4’s Education Service Center evaluated each application using TEA’s scoring rubric that assesses the strength of the academic model, organizational capacity, governance, financial stewardship, and operational readiness, including identification of strengths, weaknesses, and risk areas.

3. HISD then conducts capacity interviews to validate written evidence, test implementation feasibility, clarify governance and autonomy practices, and confirm the operating partner can meet the performance contract’s academic, governance, financial, and compliance requirements. A team from the Chief of Strategic Initiatives, Chief of Staff, Chief of Schools, and Central Division offices along with a member from the Region 4’s Education Service Center met to conduct these interviews. Final award decisions are aligned to evidence and readiness to deliver outcomes under contract-based accountability.

2. Describe the process undertaken to provide opportunities for the public to learn about potential charter applications prior to approval decisions by the local board.

Community engagement for the SB 1882 partnerships was intentional, campus-led, and ongoing throughout the development of the applications and contract discussions. Each campus hosted community meetings to provide partnership updates, share the purpose and scope of the performance contract, and receive feedback from families and stakeholders. Engagement also included administrator and teacher leader meetings, campus-wide teacher meetings, and regularly scheduled site-based decision-making team meetings to ensure staff voice and alignment on the proposed autonomy, supports, and accountability expectations. Campuses also leveraged existing family engagement structures through Parent Teacher Organization (PTO) and Parent Teacher and Student Association (PTSA) meetings, as well as informal “coffee with the principal,” to expand access for working families and ensure two-way communication. To keep parents informed between meetings, campuses used ParentSquare, the district and campus messaging system, to provide timely updates, share meeting information and materials, and maintain consistent communication as partnership planning progressed.

HISD provided opportunities for the public to learn about proposed partnerships through required board action processes conducted under open meetings requirements, including agenda publication and public notice in advance of authorization and performance contract approval. HISD also ensured that board materials and district communications provided stakeholders with visibility into the purpose of the partnership,

governance structure, and the accountability commitments included in the performance contract prior to final action.

3. Describe the process for communicating application evaluation criteria and approval/denial decisions, including the basis for such decisions, to charter applicants.

HISD communicated application evaluation criteria and approval/denial decisions through a transparent, structured process with frequent, documented touchpoints. Evaluation criteria were provided in advance through the published district application and scoring rubric, and each partnership received ongoing rubric-aligned feedback throughout development to clarify expectations and strengthen evidence prior to final decisions. Communication occurred through standing weekly 1:1 meetings with each partnership and its leadership team to review progress against the criteria, address questions, and confirm required deliverables. In addition, HISD facilitated weekly whole-group partnership meetings with all partners to reinforce common expectations, timelines, and evaluation standards, as well as a weekly interoffice huddle with cross-department leaders to ensure consistent guidance and alignment across academics, finance, operations, legal, and communications. Progress, evaluation findings, and decision points were also reviewed in bi-weekly meetings with central office leadership, and Superintendent Miles received regular briefings on partnership progress and deliverables through Monday cabinet updates. Where applicable, partners also received timely feedback through TEA office hours to resolve technical questions and ensure submissions aligned to state requirements. Collectively, these routines ensured that partners understood the evaluation criteria, received clear feedback tied to those criteria, and were informed of approval conditions or denial rationale based on documented evidence and readiness to execute under the performance contract.

In addition, HISD communicated application requirements and evaluation criteria through the published application and scoring rubric. Following evaluation, HISD provided applicants with rubric-anchored feedback and capacity interview findings, including documented strengths, weaknesses, and any conditions required to proceed to contracting. Approval or denial decisions are grounded in evidence of academic model strength, capacity to implement, governance readiness, financial controls, compliance readiness, and the ability to meet measurable performance targets under the contract.

Oversight and Evaluation

1. Describe the relationship and key responsibilities between the school district board of trustees, the district administration, and the charter holder/operating partner.

The HISD Board of Managers, and successor governance structure as applicable, retains authorization authority and approves the partnership charter and performance contract. District administration implements the authorizing policy, conducts monitoring and compliance oversight, and enforces performance contract terms and remedies. The operating partner operates as an independent contractor responsible for day-to-day campus operation and implementation of the educational model within the autonomy granted by the contract and applicable law, including governance through its own board. The performance contract defines responsibilities, reporting requirements, and consequences to ensure transparency and accountability. Consistent with EL(LOCAL), the Board's role includes approval of the external performance contract for each campus and oversight decisions related to renewal, probation, and termination based on academic, financial, operational, and governance standards set forth in the performance contract.

2. Describe the areas of autonomy and flexibility provided to charter campuses in the district. Specifically, identify district policies that will be identified in the performance contract as being applicable to the

charter campus for which the campus could otherwise be exempt under TEC, Chapter 12, Subchapter C.

HISD grants autonomy in a manner consistent with TEC Chapter 12, Subchapter C, and the performance contract, with the school exempt from laws and rules to the fullest extent allowed and exempt from district policies except those specifically identified as applicable in the agreement. HISD's approach aligns to the Earned Autonomy Framework: autonomy is earned and structured so the campus can control the key variables that produce the desired model and outcomes, while maintaining non-negotiable parameters that protect students and preserve system coherence. Those parameters include compliance with board policy, as agreed upon and or updated by the OP, and state and federal law. The OP has full autonomy over areas such as; the district calendar, districtwide assessments, district oversight, district compliance requirements, and instructional expectations. Within these guardrails, the operating partner has broad decision rights over school operations and the instructional program, including program design, curriculum decisions beyond minimum state requirements, instructional delivery model, master schedule, staffing, budget planning, purchased services as specified in the contract, staffing, and facility. For Level 5 earned autonomy campuses, HISD's Earned Autonomy Framework establishes objective performance-based thresholds and ongoing expectations that preserve autonomy: eligibility is tied to sustained "A" performance and defined limits on achievement gaps, and continued autonomy is contingent on maintaining an "A" rating and reducing the achievement gaps between black and white students and Hispanic and white students in math and reading to the contract's required target over the term of the contract. Per EL(LOCAL), once an external performance contract is granted, the campus is exempt from Board policies except those specified in the performance contract; accordingly, the contract will include a list of District policies with which the campus must comply, including, at minimum: FFH(LOCAL), DAA(LOCAL), DBAA(LOCAL), DI(LOCAL), DIA(LEGAL) and DIA(LOCAL), DG(LEGAL), DGA(LEGAL) and DGA(LOCAL), FFI(LEGAL) and FFI(LOCAL), CQ(LEGAL) and CQ(LOCAL), and AE(LOCAL) limited to the sections "Goals and Progress Measures" and "Constraints and Constraint Progress Measures."

3. Describe the district's process for routinely monitoring accountability and compliance, as defined in the charter contract. Include the frequency and timeline for all monitoring activities.

HISD implements a structured, performance-driven oversight system to ensure that school-level autonomy is consistently matched with accountability for student outcomes, financial stewardship, and operational execution. Oversight is grounded in the performance contract and operates on a defined cadence with clear performance triggers and corresponding actions.

HISD conducts monthly internal monitoring of leading indicators, including student attendance, enrollment stability, staffing levels, and interim assessment data. These reviews are conducted by the operating partner and campus leadership, with required submission of key data to the district for review.

HISD conducts quarterly formal performance reviews to assess progress toward annual contract goals. These reviews include analysis of academic performance (interim assessments and course outcomes), financial performance (budget-to-actuals and expenditure tracking), and operational metrics (staff retention and enrollment stability). Findings from each quarterly review are documented and used to determine whether the campus is on track to meet annual performance targets.

Operating partners are required to submit mid-year (January) and end-of-year (June) performance reports to the Superintendent. These reports include comprehensive updates on academic outcomes, financial health, staffing, and implementation of the approved school model.

HISD conducts an annual accountability review aligned to state accountability outcomes and contract-specific performance goals. Based on this review, campuses may continue in good standing, be placed on an improvement plan, or enter a probationary status.

Clear performance triggers guide district action. Failure to meet interim growth targets in two consecutive quarters results in a required improvement plan. Failure to meet annual performance targets may result in probationary status and increased monitoring. Material financial variances greater than 10 percent from the approved budget without justification result in a required financial review and corrective action plan. Operational concerns, including elevated staff vacancy rates or enrollment instability, may trigger targeted intervention and escalation of oversight.

All monitoring activities, findings, and required actions are formally documented to ensure transparency and alignment with contract enforcement.

4. Outline any district data collection requirements, including a reporting schedule, site-visits, mandated assessments, and any required student-management system.

HISD requires consistent and standardized data collection and reporting to ensure effective oversight, informed decision-making, and compliance with all state and federal requirements.

Operating partners are required to utilize district-approved student information systems and data platforms and must submit all required data in alignment with PEIMS timelines and state reporting requirements. All state and district assessments must be administered in accordance with district expectations.

Operating partners must submit data according to the following cadence: monthly submission of key operational and leading indicator metrics, quarterly submission of academic, financial, and operational performance reports, and bi-annual submission of comprehensive mid-year and end-of-year performance reports. HISD conducts a full annual accountability and compliance review aligned to state accountability outcomes and contract expectations.

HISD conducts at least one formal monitoring site visit annually, with additional visits conducted as needed based on performance. Site visits include classroom observations, leadership meetings, and review of compliance and operational practices.

This data collection and reporting structure ensures that HISD maintains real-time visibility into campus performance and can take timely and appropriate action when performance concerns arise.

Revocation and Renewal

1. Describe the charter terms and evidence required for renewal of a charter agreement.

HISD utilizes a performance-based renewal process to determine whether a partnership contract will be extended. Renewal decisions are grounded in objective performance outcomes, compliance with contractual obligations, and sustained implementation of the approved school model.

To be eligible for renewal, campuses must demonstrate strong academic performance, including meeting or exceeding state accountability standards and contract-specific performance goals. Campuses must also demonstrate measurable progress in student outcomes, including both achievement and growth. In addition, campuses must maintain sound financial practices, including responsible budget management and successful completion of required audits, and must remain in full compliance with all legal, reporting, and contractual requirements.

HISD initiates the renewal process during Year 4 of the contract term, beginning with a preliminary review of performance trends and risk indicators. If performance concerns are identified, the district provides formal notification and may require additional monitoring or intervention. A final performance evaluation is conducted during Year 5, and a renewal recommendation is developed based on cumulative performance over the contract term.

HISD provides formal notice of renewal or non-renewal no later than April 1 of the final contract year, in accordance with state requirements. Renewal decisions are based on sustained performance over time rather than a single year of results.

2. Describe the criteria and a specific timeline for non-renewal of a charter agreement.

A campus may be subject to non-renewal if it fails to meet academic performance expectations over the course of the contract term, demonstrates persistent performance deficiencies despite intervention, or fails to meet financial or compliance requirements.

HISD identifies campuses at risk of non-renewal through its ongoing monitoring processes and provides notice and opportunity for improvement prior to making a final determination. If performance concerns persist, the district issues formal notification of non-renewal risk during Year 4 of the contract term.

Formal notice of intent not to renew is provided no later than April 1 of the final contract year, in alignment with state requirements and contract terms.

3. Describe the process for establishment of a closure protocol to be used in the event of non-renewal of a charter agreement.

HISD establishes a closure and transition protocol to ensure continuity of services, protection of student rights, and orderly transfer of operations. The protocol includes family communications, continuity planning for students requiring special services, records transfer consistent with law, inventory and asset reconciliation, staffing transition planning, and a defined operational handoff plan to minimize disruption. The district may require transition cooperation and documentation to ensure students experience minimal disruption and compliance obligations are fully met.

4. Describe the criteria for revocation of a charter agreement.

In cases of potential revocation, HISD follows a structured, contract-aligned process to ensure due process and timely intervention.

Upon identification of a material issue, HISD issues a formal notice of concern outlining the specific deficiencies and required corrective actions. The operating partner is provided a defined cure period, typically ranging from 30 to 90 days depending on the severity of the issue.

Following the cure period, HISD conducts a follow-up review to assess whether corrective actions have been successfully implemented. If deficiencies are not resolved, the district may proceed with termination of the contract in accordance with contract provisions.

When feasible, termination is structured to occur at the end of the school year to minimize disruption to students. All actions are documented to ensure transparency and alignment with legal and contractual requirements.

5. Describe the procedure and a specific timeline for revocation of a charter agreement.

HISD follows the performance contract's termination provisions, including written notice of material breach and an opportunity to cure within the timeframe established in the contract, except when the breach affects student safety or well-being or is not reasonably capable of being cured. If deficiencies are not remedied, HISD may terminate the agreement consistent with contract terms, including termination effective at the end of the then-current school year when required timelines are met. HISD documents findings, required corrective actions, and final determinations to ensure transparency and compliance with governing requirements.

Local Campus Partner Application and Evidence of Evaluation

Districts must submit this attachment for **each partnership school** under consideration for Partnership School benefits.

Districts must submit two items:

- **Attachment B1: Local Campus Partner Application:** The application that the partner organization completed and submitted to the district review panel for evaluation.
- **Attachment B2: Local Campus Partner Application Evidence of Evaluation:** The evidence that the district review panel thoroughly evaluates the proposal from the potential operator. This includes documents that demonstrate how the application was evaluated/scored, what areas needed to be addressed in the capacity interview, and notes from the capacity interview.

Attachments should be titled and ordered by partnership school/campus name. For example, a district submitting two partnerships for approval would title attachments as follows:

- Campus 1_Attachment B1_Local Campus Partner Application
- Campus 2_Attachment B1_Local Campus Partner Application
- Campus 1_Attachment B2_Local Campus Partner Application Evidence of Evaluation
- Campus 2_Attachment B2_Local Campus Partner Application Evidence of Evaluation

Partnership Performance Contract

Districts must submit this attachment for **each partnership school** under consideration for Partnership School benefits.

Attachment C: Partnership Performance Contract: the board-approved contract between school district and partner organization to operate the partnership school.

Attachments should be titled and ordered by partnership school/campus name. For example, a district submitting two partnerships for approval would title attachments as follows:

- Campus 1_Attachment C_Partnership Performance Contract
- Campus 2_Attachment C_Partnership Performance Contract

Partnership Assurances Documentation

The partnership assurances document serves as a commitment from the district superintendent and board of trustees that all proposed partnerships do not present a conflict of interest with the district and that the district has done its due diligence to ensure that each partner is capable of the work it has agreed to perform in the performance contract. TEA will monitor continued adherence to these assurances while the partnerships received Texas Partnership benefits.

The Superintendent of the district shall initial each and all assurances within this document to confirm awareness and understanding of responsibilities established herein.

I. Governance

JMM The district assures that the governing body of each operating partner is not and shall not be comprised of any members of the independent school district's board of trustees, the superintendent, or staff responsible for evaluating the partnership application or overseeing the performance contract.

JMM The district assures that the majority of the governing body of each operating partner is not comprised of district staff.

JMM The district assures that no member of the governing body of each partner will be related within the first degree of affinity or consanguinity with any members of the independent school district's board of trustees, the superintendent, or staff responsible for granting the charter or contract to partner to operate or overseeing the performance contract.

JMM The district assures that all members of the governing body of each operating partner have passed and will continually pass the district's conflict of interest checks.

JMM The district assures that the district has not appointed a majority of the members of the governing board of each operating partner.

JMM The district assures that the governing body of the operating partner will participate in board governance training provided by TEA, or a vendor recommended by TEA.

JMM The district assures that it will submit the names and background information for all partner board members to the agency annually.

II. Performance Contract

JMM The district assures that the district and each proposed operating partner meet the requirements to contract to partner to operate, as outlined in TAC §97.1075 (relating to Contracting to Partner to Operate a Campus under Texas Education Code, §11.174, as amended).

JMM The district assures that the district is aware that to maintain benefits eligibility, the performance contract must meet the eligibility requirements described in this application and all

statutory requirements for the duration of the partnership, and that all performance contract amendments must be submitted to the agency within 30 days.

III. Authorizing Policies and Practices

JMM The district assures that it will continuously meet the requirements to authorize an operating partner, as outlined in TAC §97.1079 (relating to Determination Processes and Criteria for Eligible Entity Approval under Texas Education Code §11.174, as amended).

JMM The district assures that it will not authorize performance contracts to partner to operate a campus that are contingent upon overall campus academic performance ratings, or the receipt of additional funding relate to TEC §11.174.

IV. Operating Partner Capacity

JMM The district assures that each operating partner has reasonable staff capacity, including at least one full-time equivalent employee in place at the time this application is submitted, necessary to oversee the operation of the campus(s).

I, the undersigned, hereby certify that the district has authorized me to provide these assurances as noted by my initials on this and all previous pages.

F. Mike Miles

Printed Name of District Superintendent

JMM

Signature of District Superintendent

03-26-2026

Date

Ric Campo

Printed Name of President (Board of Trustees)

RC

Signature of President (Board of Trustees)

03-26-2026

Date

The background of the entire page is a photograph of a classroom. In the foreground, two young boys are looking towards the right. One boy is wearing a dark shirt, and the other is wearing a striped shirt. In the background, a teacher with long dark hair and glasses is smiling and gesturing with her hands while talking to a group of children. The children are also smiling and looking towards the teacher. The overall atmosphere is positive and educational.

Texas Partnerships Benefits Application

For Texas Partnerships Benefits that begin in the 2026-2027 school year



TEXAS PARTNERSHIPS (SB 1882) BENEFITS APPLICATION

For Texas Partnerships Benefits that begin in the 2026-2027 school year

Application Instructions

This document is the application for Texas Partnerships (SB 1882) benefits. For more information about Texas Partnerships, including a description of different types of partnerships, partnership benefits, eligibility requirements, and how TEA will evaluate applications, please download the Texas Partnerships Guide from the [Texas Partnerships website](#).

TEA will accept applications on a rolling basis, with two priority deadlines and one final deadline. Districts and proposed operating partners must also attend mandatory webinars, and districts must have their local charter authorizing board policy and their local campus application and scoring rubric approved prior to submitting the full benefits application package. Table 1, below, shows the timeline for application package submissions.

Table 1. Application Timeline for Texas Partnerships Benefits

Action	Date
District and proposed operating partner attend required Texas Partnerships Overview webinar	District and partner representatives will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 15, 2025, 3-4:30p• July 22, 2025, 9a-10:30a• September 9, 2025, 3p-4:30p• September 16, 2025, 9a-10:30a
District and proposed operating partner attend required Texas Partnerships Performance Contract webinar	District and partner representatives will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 16, 2025, 3p-4p• July 23, 2025, 9a-10a• September 10, 2025, 3p-4p• September 17, 2025, 9a-10a
District attends required Submitting a Successful Texas Partnerships Application webinar	District representative will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 17, 2025, 3p-4p• July 24, 2025, 9a-10a• September 11, 2025, 3p-4p• September 18, 2025, 9a-10a
District submits non-binding mandatory Letter of Intent to Apply for Texas Partnerships Benefits <i>The deadline to submit the Letter of Intent is the same for all application due dates. TEA will not accept a Texas Partnerships Benefits Application Package from a district unless the</i>	No later than Friday, December 5, 2025, at 5 p.m. (Central Time)

<i>district has completed a Letter of Intent by the required deadline.</i>	
District submits locally-developed charter authorizing policy, local campus partner application, and/or local application scoring rubric OR notifies TEA that the district has adopted TEA models	No later than Friday, December 5, 2025, at 5 p.m. (Central Time), or no later than 5 working days prior to local campus application release (whichever date is earlier)
Texas Partnerships Benefits Application Package Priority Deadline 1 <i>NOTE: Charter School Program Start-Up Grant funding may be available per approval of extensions</i>	Monday, December 15, 2025, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than February 13, 2026)</i>
Texas Partnerships Benefits Application Package Priority Deadline 2 <i>Districts that submit by this date do not have to submit Attachment D: Pre-Opening Checklist and Implementation Plan</i>	Friday, January 30, 2026, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than March 31, 2026)</i>
Texas Partnerships Benefits Application Final Deadline <i>Districts that submit in February or March must include Attachment D: Pre-Opening Checklist and Implementation Plan with their application</i>	Tuesday, March 31, 2026, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than May 29, 2026)</i>

A complete application includes the following documents.

- ☐ Completed Texas Partnership Application Template (this document)
- ☐ Attachment A: Local Board-Approved Charter Authorizing Policy
- ☐ Attachment B1: Local Campus Partner Application (for each partnership school)
- ☐ Attachment B2: Local Campus Partner Application Evidence of Evaluation (for each partnership school)
- ☐ Attachment C: Partnership Performance Contract (for each partnership school)
- ☐ Attachment D: Pre-Opening Checklist and Implementation Plan (for each partnership school; only required if submitting after January 30, 2026)

Districts can submit a single application for multiple partnership schools but must submit separate attachments B and C for each school.

Please submit the completed application package to TEA using the following steps:

- Save this Partnership Application template as a PDF document titled with district name and document type (e.g., *District Name-Partnership Application*), and
- Please save required attachments as PDF documents. See application instructions for file naming convention.
- Email all files to TXP@tea.texas.gov with the subject line as follows - [Texas Partnerships Benefits Application Package District Name].

Specifications

- Applicants **must** submit proposals electronically and use the template provided.
- Only responses placed within the text boxes provided will be considered for evaluation activities.
- Late submissions will not be accepted.
- Submissions from districts that did not submit a letter of intent by Friday, December 5, 2025 will not be accepted.
- Submissions from districts that did not attend all required webinars will not be accepted.
- Submissions that include an operating partner that did not attend all required webinars will not be accepted.
- Submissions that include a partner that does not have a governing board of at least 3 members and at least one full time staff at the time the application package is submitted will not be accepted.

District Information

District Name	Houston Independent School District (HISD)
Superintendent Name	Mike Miles
Superintendent Email and Phone Number	Mike.Miles@houstonisd.org 713-556-6305
Primary District Point of Contact (if different from superintendent)	Orlando Riddick
Primary District Point of Contact Email and Phone Number (if different from superintendent)	Orlando.Riddick@houstonisd.org
Submission Date	March 31, 2026

Operating Partner and Campus Information

Please complete the following information for each operating partner organization. Copy and paste the full table below if this application includes more than one operating partner.

Name of Partner Organization: Click or tap here to enter text.		
Authorizing statute for this partnership¹: §12.0522		
Primary Partner Contact Information		
Name: Orlando Riddick	Role: Chief of Strategic Initiatives	Email: Orlando.Riddick@houstonisd.org
Eligible Organization:		
<i>To be eligible for Texas Partnerships benefits, the district must contract with the governing body of an open-enrollment charter school (authorized by the state of Texas) or an entity that meets the criteria in TEC 12.101(a).</i>		
Organization status: Tax exempt organization under Section 501(c)(3)		
Please describe how the district verified this organization's status: HISD verified the operating partner's eligibility by confirming the organization's legal status as either (1) the governing body of an open-enrollment charter school authorized by the state of Texas, or (2) an entity meeting the criteria in TEC 12.101(a). Verification included review of the partner's formation documents and governance structure, evidence of tax-exempt status where applicable, and confirmation that the organization is eligible to hold and execute a performance contract to operate an in-district charter campus under TEC Chapter 12, Subchapter C. HISD also conducted conflict-of-interest screening aligned to district assurances and required governance independence, including checks to ensure no prohibited overlap with district decision-makers or evaluators.		

¹ District boards may grant charters under Texas Education Code, Chapter 12, Subchapter C in the following ways:

- TEC 12.052: the board grants a charter to parents and teachers of a campus or campus program after receiving a petition from parents and teachers at the campus
- TEC 12.0521: the board grants a charter for a new campus or to an entity that has entered into contract with the district
- TEC 12.0522: the board grants a district charter to a campus (Enrollment at these campuses cannot exceed 15% of the district's total student enrollment unless the campus is a turnaround campus, is part of a feeder pattern of district charters, or the district receives a waiver from the agency. TEA will review attendance counts at fall snapshot to see if the district has exceeded the 15% threshold.)
- TEC 12.053: the board grants a charter to parents and teacher at two or more campuses for a cooperative charter program after receiving a petition from parents and teachers at the campus

Operating Partner Board:

Each operating partner organization must have at least 3 board members. Add rows as needed.

Board Member Name	Position on the board	Email (Required for board president only)
1. HSPVSA - Janis Jarosz	Chair	
HSPVA - Frank Angelle,	Treasurer	
HSPVA - M. Kaye DeWalt	Secretary	
2. Challenge ECHS - Anne McClellan	President	
Challenge ECHS - Justin Fuentes	Treasurer	
Challenge ECHS – Mike Webster	Secretary	
3. Energy - Julie Zachary	TBD	
Energy - Lucie Tredennick	TBD	
Energy - Kathy Kahanek	TBD	
4. HAIS - Jennifer Kapral	TBD	
HAIS - Brian Gaston	TBD	
HAIS - Brenda Rangel	TBD	

Campus Information:

Provide the following information about the campus(es) this partner will manage. If this a new campus for which there is no CDCN, type "new" in the CDCN column. Add rows as needed if this partner will manage multiple campuses in the district.

Campus Name:	County District Campus Number:	Grade levels served in Year 1:	Grade levels served at capacity:
1. Kinder High School for the Visual and Performing Arts (HSPVA)	1. 101912025	1. 9-12	1. 9-12
2. Challenge Early College High School (Challenge ECHS)	2. 101912323	2. 9-12	2. 9-12
3. Energy Institute High School (Energy)	3. 101912468	3. 9-12	3. 9-12
4. Houston Academy for International Studies (HAIS)	4. 101912348	4. 9-12	4.9-12

Operating Partner Staff Member(s) Responsible for Campus Management (including principal evaluation)²:

- Kinder High School for the Visual and Performing Arts – Dr. Priscilla Rivas (Anticipated Hire Date 7/1/2026)
- Challenge Early College High School – Jose Santos (Anticipated Hire Date 7/1/2026)
- Energy Institute High School – Lori Lambropoulos (Anticipated Hire Date 7/1/2026)
- Houston Academy for International Studies – Melissa Jacobs (Anticipated Hire Date 7/1/2026)

Turnaround Partnership Information

Only required for districts seeking a pause in accountability sanctions under TEC 11.174(f)

² If campus management staff has not yet been hired, enter the anticipated hire date. Texas Partnership benefits will not be awarded until TEA has received verification that the partner organization has hired this staff member. If campus management staff is currently employed by the district, the district must provide evidence (attach to this application) that this staff is:

- under contractual obligation with the operating partner board, and
- solely dedicated to planning the launch of the campus at the time of application for benefits.

1. If any of the operating partners above will manage a turnaround campus (a campus whose most recent accountability rating was an F), please describe the operating partner's prior experience managing campuses. Include how many campuses the partner managed, the number of years they have managed those campuses, and the organization's track record of managing campuses to academic success or significantly improving the academic performance of the campuses.

N/A

Click or tap here to enter text.

2. How did the district define a track record of academic success and/or significant improvement in academic outcomes?

N/A

Click or tap here to enter text.

3. Has this organization successfully turned a campus around in the past (i.e., improved campus performance from an unacceptable rating to an A, B, or C rating)? If yes, please describe. If no, please describe how the district evaluated the partner organization's ability to successfully execute a turnaround strategy at the district campus.

N/A

Click or tap here to enter text.

Charter Authorizing Policies and Practices

Districts seeking approval for partnership benefits must provide evidence of high-quality district charter authorizing policies and practices. Districts must submit their local, board-approved partnership authorizing policy as attachment A to this application. Districts must also respond to the questions below.

Required:

- **Attachment A:** Local Charter Authorizing Policy (*as currently adopted by local district school board*). Districts are required to adopt TEA's Model Local Charter Authorizing Policy or a similar policy approved by TEA. If the district is not using the Model Local Charter Authorizing Policy, the district's policy must be approved before the agency (by December 4, 2023 or no later than 5 working days prior to local campus application release, whichever is earlier).
- **Respond to** questions in the Summary of Charter Authorization Policies and Practices below.

Summary of Charter Authorizing Policies and Practices

All districts must respond to the following questions about their local authorizing policies and practices. All questions under each section must be addressed. **Answers must explain the contents of the district board policy or the performance contract; copy and pasting sections of the board policy or contract is insufficient.**

Authorizing Mission and Core Vision

1. Describe the mission and vision of the district's efforts to authorize new charter campuses and programs.

HISD's work to authorize in-district charter campuses is grounded in a clear district vision and mission. The vision is to establish high-quality autonomous schools that expand choice and prepare every student for the 2035 workplace and world. The mission is to expand high-quality autonomous schools that increase choice, foster innovation, and strengthen student outcomes.

In service of this vision, HISD's approach to authorizing charter campuses is to expand and sustain high-quality learning options by pairing meaningful school-level autonomy with rigorous, enforceable accountability for student outcomes and equity. This work is grounded in a Defined to Earned Autonomy Framework, in which autonomy is earned and intentionally structured so campuses can control the core variables needed to deliver their educational model, while the district maintains clear guardrails that protect students, ensure compliance, and preserve system coherence.

This approach enables innovation and specialized programming while avoiding the inequities and inefficiencies that can result from autonomy without strong accountability. The framework establishes a performance-based pathway in which higher-performing campuses may qualify for Level 5 autonomy, ensuring that autonomy is awarded intentionally and sustained only when student outcomes and equity commitments remain strong.

Consistent with EL(LOCAL), HISD recognizes external partnerships for educational services (Texas Partnerships) as External Performance Contract Campuses operated under a Board-approved performance contract. These campuses are exempt from instructional and academic rules and Board policies except as specified in the contract, allowing for increased flexibility while maintaining clear expectations for performance and accountability.

- 2. Explain how work to authorize new charter campuses will focus on improving student learning, increasing choice, creating professional opportunities to attract teachers, establishing new forms of accountability, and encouraging innovative learning methods.**

HISD's authorizing approach improves learning by requiring explicit student outcome goals, progress monitoring, and consequences for underperformance through the performance contract. It increases choice by enabling distinct campus models and specialized programming to operate within HISD through authorized in-district charters. It supports professional opportunities by allowing the operating partner to implement its instructional program and campus operating model, including staffing, scheduling, and professional learning routines, within applicable law and contract guardrails. It establishes new forms of accountability by tying renewal and continuation to measurable performance targets, including required reporting and improvement planning when targets are not met. It encourages innovation by granting exemptions to the fullest extent permitted under TEC Chapter 12, Subchapter C, while maintaining a small set of non-negotiable district parameters (such as compliance requirements, calendar, assessments, and instructional expectations that ensure TEKS coverage and student safety). Under the *Earned Autonomy Framework*, Level 5 autonomy is reserved for campuses demonstrating sustained excellence and equity, which strengthens accountability by connecting the highest levels of flexibility to verified performance and narrowing achievement gaps, not merely to compliance with processes.

In alignment with EL(LOCAL), HISD's application and approval process includes a comprehensive written application, a rigorous review by a review committee with conflict-of-interest checks, a capacity interview with partner representatives, superintendent recommendation, and Board approval by vote, ensuring innovation is paired with documented readiness and public governance.

- 3. Explain how the district's efforts to authorize new charter campuses will support the district's broader strategy to improve student outcomes.**

HISD's broader strategy is to raise student achievement, narrow achievement gaps, and prepare students for future success while maintaining strong oversight and equity safeguards. SB 1882 partnerships support this strategy by enabling high-performing and unique schools to gain additional autonomy (including a Level 5 autonomy approach for qualifying campuses) while maintaining clear district parameters and enforceable performance expectations. Through the performance contract, HISD aligns autonomy to accountability, ensuring that innovative campus models contribute to systemwide improvement without compromising compliance, student protections, or fiscal stewardship. HISD's *Level 5 Earned Autonomy Framework* operationalizes this strategy by setting objective entry criteria for expanded autonomy (sustained "A" accountability performance and controlled achievement gaps) and requiring continued performance and gap reduction targets over the contract term, ensuring the partnership advances both excellence and equity districtwide.

Commitment and Capacity

- 1. Describe the capacity and resources dedicated to the district's charter authorizing process, including the evaluation, nomination, and ongoing monitoring of district charter campuses.**

HISD has established a cross-functional authorizing structure to ensure rigorous evaluation, effective oversight, and consistent enforcement of performance contracts. The Chief of Strategic Initiatives leads the district's authorizing work, including application evaluation, performance monitoring, and partnership oversight. The Superintendent provides final approval recommendations and ensures alignment with district

strategy, and the Board of Managers approves all performance contracts as well as renewal and non-renewal decisions. HISD's authorizing work is supported through a matrixed structure that includes dedicated leadership and functional expertise across key departments. Legal Services supports contract development and compliance enforcement. The Finance team provides financial oversight, including budget monitoring and audit alignment. Academic teams support monitoring of instructional performance and student outcomes. Operations teams support facilities, staffing, and operational compliance. This structure allows HISD to apply domain-specific expertise to each component of the authorizing process while maintaining clear accountability for overall performance. The model enables consistent monitoring across multiple campuses, ensures that performance expectations are enforced with fidelity, and provides the capacity necessary to sustain high-quality authorizing practices over time.

2. Identify the key members of the district's leadership team by name and title and describe their individual and collective qualifications for authorizing, monitoring, and evaluating the district charter(s).

Mike Miles, Superintendent, provides executive leadership and ensures partnerships align to HISD's mission, defined to earned autonomy parameters, and performance expectations. Orlando Riddick, Chief of Strategic Initiatives, serves as the district point of contact and leads the authorizing process, cross-department coordination, and the monitoring structure aligned to the performance contract. HISD Legal Services supports statutory alignment, contract compliance, and enforceable remedies. HISD Finance supports fiscal stewardship, reporting requirements, and audit-aligned controls. HISD academics and school support functions support performance monitoring, progress reporting, and compliance with state and federal program requirements. Collectively, this team brings expertise in governance, contract management, accountability systems, operational readiness, and compliance.

3. Identify the district employee(s) that is/are fully dedicated to overseeing the authorizing and ongoing monitoring of in-district charters, including the date the employee(s) began in this role.

Orlando Riddick, Chief of Strategic Initiatives, and Caitlin Butler, Deputy Chief of staff, oversee the authorizing and ongoing monitoring of in-district charters, including coordination, evaluation, communication, consultation, contracting alignment, and implementation oversight. Performance and contractual oversight support is provided by Legal Services, Finance, Academics, and Operations to execute autonomy, monitoring, compliance, and reporting expectations defined in the performance contract. He began his role as Chief of Strategic Initiatives October of 2026, and Caitlin Butler began her role in support of SB1882 partners in November of 2026.

Application and Review Process

1. Describe the process for evaluating and awarding proposals submitted under TEC Chapter 12, Subchapter C. Please include a description of:

- **the questions asked in the operator application (if the district used the TEA model application, please indicate in this section),**
 1. HISD evaluated proposals through a structured process using the TEA Cycle 9 Local Campus Partner Application model. Applicants completed the local campus partners application (TEA model-aligned), which requires clear evidence of the academic model, governance and decision

rights, staffing and operational plan, financial plan and controls, compliance readiness, and measurable performance commitments.

- **the rubric used by the district’s review panel to evaluate partner applications, including how the district evaluated the operating partner’s academic model, the operator’s strengths and weaknesses and past academic performance, and**

1. A district review panel evaluates each application using TEA’s scoring rubric that assesses the strength of the academic model, organizational capacity, governance, financial stewardship, and operational readiness, including identification of strengths, weaknesses, and risk areas.

- **the process the district used for conducting capacity interviews.**

1. HISD evaluates proposals through a structured local process. Applicants complete the local campus partners application (TEA model-aligned), which requires clear evidence of the academic model, governance and decision rights, staffing and operational plan, financial plan and controls, compliance readiness, and measurable performance commitments.

2. A district review panel from the Chief of Strategic Initiatives, Chief of Staff, Chief of Schools, Central Division offices along with a representative from Regio 4’s Education Service Center evaluated each application using TEA’s scoring rubric that assesses the strength of the academic model, organizational capacity, governance, financial stewardship, and operational readiness, including identification of strengths, weaknesses, and risk areas.

3. HISD then conducts capacity interviews to validate written evidence, test implementation feasibility, clarify governance and autonomy practices, and confirm the operating partner can meet the performance contract’s academic, governance, financial, and compliance requirements. A team from the Chief of Strategic Initiatives, Chief of Staff, Chief of Schools, and Central Division offices along with a member from the Region 4’s Education Service Center met to conduct these interviews. Final award decisions are aligned to evidence and readiness to deliver outcomes under contract-based accountability.

2. Describe the process undertaken to provide opportunities for the public to learn about potential charter applications prior to approval decisions by the local board.

Community engagement for the SB 1882 partnerships was intentional, campus-led, and ongoing throughout the development of the applications and contract discussions. Each campus hosted community meetings to provide partnership updates, share the purpose and scope of the performance contract, and receive feedback from families and stakeholders. Engagement also included administrator and teacher leader meetings, campus-wide teacher meetings, and regularly scheduled site-based decision-making team meetings to ensure staff voice and alignment on the proposed autonomy, supports, and accountability expectations. Campuses also leveraged existing family engagement structures through Parent Teacher Organization (PTO) and Parent Teacher and Student Association (PTSA) meetings, as well as informal “coffee with the principal,” to expand access for working families and ensure two-way communication. To keep parents informed between meetings, campuses used ParentSquare, the district and campus messaging system, to provide timely updates, share meeting information and materials, and maintain consistent communication as partnership planning progressed.

HISD provided opportunities for the public to learn about proposed partnerships through required board action processes conducted under open meetings requirements, including agenda publication and public notice in advance of authorization and performance contract approval. HISD also ensured that board materials and district communications provided stakeholders with visibility into the purpose of the partnership,

governance structure, and the accountability commitments included in the performance contract prior to final action.

3. Describe the process for communicating application evaluation criteria and approval/denial decisions, including the basis for such decisions, to charter applicants.

HISD communicated application evaluation criteria and approval/denial decisions through a transparent, structured process with frequent, documented touchpoints. Evaluation criteria were provided in advance through the published district application and scoring rubric, and each partnership received ongoing rubric-aligned feedback throughout development to clarify expectations and strengthen evidence prior to final decisions. Communication occurred through standing weekly 1:1 meetings with each partnership and its leadership team to review progress against the criteria, address questions, and confirm required deliverables. In addition, HISD facilitated weekly whole-group partnership meetings with all partners to reinforce common expectations, timelines, and evaluation standards, as well as a weekly interoffice huddle with cross-department leaders to ensure consistent guidance and alignment across academics, finance, operations, legal, and communications. Progress, evaluation findings, and decision points were also reviewed in bi-weekly meetings with central office leadership, and Superintendent Miles received regular briefings on partnership progress and deliverables through Monday cabinet updates. Where applicable, partners also received timely feedback through TEA office hours to resolve technical questions and ensure submissions aligned to state requirements. Collectively, these routines ensured that partners understood the evaluation criteria, received clear feedback tied to those criteria, and were informed of approval conditions or denial rationale based on documented evidence and readiness to execute under the performance contract.

In addition, HISD communicated application requirements and evaluation criteria through the published application and scoring rubric. Following evaluation, HISD provided applicants with rubric-anchored feedback and capacity interview findings, including documented strengths, weaknesses, and any conditions required to proceed to contracting. Approval or denial decisions are grounded in evidence of academic model strength, capacity to implement, governance readiness, financial controls, compliance readiness, and the ability to meet measurable performance targets under the contract.

Oversight and Evaluation

1. Describe the relationship and key responsibilities between the school district board of trustees, the district administration, and the charter holder/operating partner.

The HISD Board of Managers, and successor governance structure as applicable, retains authorization authority and approves the partnership charter and performance contract. District administration implements the authorizing policy, conducts monitoring and compliance oversight, and enforces performance contract terms and remedies. The operating partner operates as an independent contractor responsible for day-to-day campus operation and implementation of the educational model within the autonomy granted by the contract and applicable law, including governance through its own board. The performance contract defines responsibilities, reporting requirements, and consequences to ensure transparency and accountability. Consistent with EL(LOCAL), the Board's role includes approval of the external performance contract for each campus and oversight decisions related to renewal, probation, and termination based on academic, financial, operational, and governance standards set forth in the performance contract.

2. Describe the areas of autonomy and flexibility provided to charter campuses in the district. Specifically, identify district policies that will be identified in the performance contract as being applicable to the

charter campus for which the campus could otherwise be exempt under TEC, Chapter 12, Subchapter C.

HISD grants autonomy in a manner consistent with TEC Chapter 12, Subchapter C, and the performance contract, with the school exempt from laws and rules to the fullest extent allowed and exempt from district policies except those specifically identified as applicable in the agreement. HISD's approach aligns to the Earned Autonomy Framework: autonomy is earned and structured so the campus can control the key variables that produce the desired model and outcomes, while maintaining non-negotiable parameters that protect students and preserve system coherence. Those parameters include compliance with board policy, as agreed upon and or updated by the OP, and state and federal law. The OP has full autonomy over areas such as; the district calendar, districtwide assessments, district oversight, district compliance requirements, and instructional expectations. Within these guardrails, the operating partner has broad decision rights over school operations and the instructional program, including program design, curriculum decisions beyond minimum state requirements, instructional delivery model, master schedule, staffing, budget planning, purchased services as specified in the contract, staffing, and facility. For Level 5 earned autonomy campuses, HISD's Earned Autonomy Framework establishes objective performance-based thresholds and ongoing expectations that preserve autonomy: eligibility is tied to sustained "A" performance and defined limits on achievement gaps, and continued autonomy is contingent on maintaining an "A" rating and reducing the achievement gaps between black and white students and Hispanic and white students in math and reading to the contract's required target over the term of the contract. Per EL(LOCAL), once an external performance contract is granted, the campus is exempt from Board policies except those specified in the performance contract; accordingly, the contract will include a list of District policies with which the campus must comply, including, at minimum: FFH(LOCAL), DAA(LOCAL), DBAA(LOCAL), DI(LOCAL), DIA(LEGAL) and DIA(LOCAL), DG(LEGAL), DGA(LEGAL) and DGA(LOCAL), FFI(LEGAL) and FFI(LOCAL), CQ(LEGAL) and CQ(LOCAL), and AE(LOCAL) limited to the sections "Goals and Progress Measures" and "Constraints and Constraint Progress Measures."

3. Describe the district's process for routinely monitoring accountability and compliance, as defined in the charter contract. Include the frequency and timeline for all monitoring activities.

HISD implements a structured, performance-driven oversight system to ensure that school-level autonomy is consistently matched with accountability for student outcomes, financial stewardship, and operational execution. Oversight is grounded in the performance contract and operates on a defined cadence with clear performance triggers and corresponding actions.

HISD conducts monthly internal monitoring of leading indicators, including student attendance, enrollment stability, staffing levels, and interim assessment data. These reviews are conducted by the operating partner and campus leadership, with required submission of key data to the district for review.

HISD conducts quarterly formal performance reviews to assess progress toward annual contract goals. These reviews include analysis of academic performance (interim assessments and course outcomes), financial performance (budget-to-actuals and expenditure tracking), and operational metrics (staff retention and enrollment stability). Findings from each quarterly review are documented and used to determine whether the campus is on track to meet annual performance targets.

Operating partners are required to submit mid-year (January) and end-of-year (June) performance reports to the Superintendent. These reports include comprehensive updates on academic outcomes, financial health, staffing, and implementation of the approved school model.

HISD conducts an annual accountability review aligned to state accountability outcomes and contract-specific performance goals. Based on this review, campuses may continue in good standing, be placed on an improvement plan, or enter a probationary status.

Clear performance triggers guide district action. Failure to meet interim growth targets in two consecutive quarters results in a required improvement plan. Failure to meet annual performance targets may result in probationary status and increased monitoring. Material financial variances greater than 10 percent from the approved budget without justification result in a required financial review and corrective action plan. Operational concerns, including elevated staff vacancy rates or enrollment instability, may trigger targeted intervention and escalation of oversight.

All monitoring activities, findings, and required actions are formally documented to ensure transparency and alignment with contract enforcement.

4. Outline any district data collection requirements, including a reporting schedule, site-visits, mandated assessments, and any required student-management system.

HISD requires consistent and standardized data collection and reporting to ensure effective oversight, informed decision-making, and compliance with all state and federal requirements.

Operating partners are required to utilize district-approved student information systems and data platforms and must submit all required data in alignment with PEIMS timelines and state reporting requirements. All state and district assessments must be administered in accordance with district expectations.

Operating partners must submit data according to the following cadence: monthly submission of key operational and leading indicator metrics, quarterly submission of academic, financial, and operational performance reports, and bi-annual submission of comprehensive mid-year and end-of-year performance reports. HISD conducts a full annual accountability and compliance review aligned to state accountability outcomes and contract expectations.

HISD conducts at least one formal monitoring site visit annually, with additional visits conducted as needed based on performance. Site visits include classroom observations, leadership meetings, and review of compliance and operational practices.

This data collection and reporting structure ensures that HISD maintains real-time visibility into campus performance and can take timely and appropriate action when performance concerns arise.

Revocation and Renewal

1. Describe the charter terms and evidence required for renewal of a charter agreement.

HISD utilizes a performance-based renewal process to determine whether a partnership contract will be extended. Renewal decisions are grounded in objective performance outcomes, compliance with contractual obligations, and sustained implementation of the approved school model.

To be eligible for renewal, campuses must demonstrate strong academic performance, including meeting or exceeding state accountability standards and contract-specific performance goals. Campuses must also demonstrate measurable progress in student outcomes, including both achievement and growth. In addition, campuses must maintain sound financial practices, including responsible budget management and successful completion of required audits, and must remain in full compliance with all legal, reporting, and contractual requirements.

HISD initiates the renewal process during Year 4 of the contract term, beginning with a preliminary review of performance trends and risk indicators. If performance concerns are identified, the district provides formal notification and may require additional monitoring or intervention. A final performance evaluation is conducted during Year 5, and a renewal recommendation is developed based on cumulative performance over the contract term.

HISD provides formal notice of renewal or non-renewal no later than April 1 of the final contract year, in accordance with state requirements. Renewal decisions are based on sustained performance over time rather than a single year of results.

2. Describe the criteria and a specific timeline for non-renewal of a charter agreement.

A campus may be subject to non-renewal if it fails to meet academic performance expectations over the course of the contract term, demonstrates persistent performance deficiencies despite intervention, or fails to meet financial or compliance requirements.

HISD identifies campuses at risk of non-renewal through its ongoing monitoring processes and provides notice and opportunity for improvement prior to making a final determination. If performance concerns persist, the district issues formal notification of non-renewal risk during Year 4 of the contract term.

Formal notice of intent not to renew is provided no later than April 1 of the final contract year, in alignment with state requirements and contract terms.

3. Describe the process for establishment of a closure protocol to be used in the event of non-renewal of a charter agreement.

HISD establishes a closure and transition protocol to ensure continuity of services, protection of student rights, and orderly transfer of operations. The protocol includes family communications, continuity planning for students requiring special services, records transfer consistent with law, inventory and asset reconciliation, staffing transition planning, and a defined operational handoff plan to minimize disruption. The district may require transition cooperation and documentation to ensure students experience minimal disruption and compliance obligations are fully met.

4. Describe the criteria for revocation of a charter agreement.

In cases of potential revocation, HISD follows a structured, contract-aligned process to ensure due process and timely intervention.

Upon identification of a material issue, HISD issues a formal notice of concern outlining the specific deficiencies and required corrective actions. The operating partner is provided a defined cure period, typically ranging from 30 to 90 days depending on the severity of the issue.

Following the cure period, HISD conducts a follow-up review to assess whether corrective actions have been successfully implemented. If deficiencies are not resolved, the district may proceed with termination of the contract in accordance with contract provisions.

When feasible, termination is structured to occur at the end of the school year to minimize disruption to students. All actions are documented to ensure transparency and alignment with legal and contractual requirements.

5. Describe the procedure and a specific timeline for revocation of a charter agreement.

HISD follows the performance contract's termination provisions, including written notice of material breach and an opportunity to cure within the timeframe established in the contract, except when the breach affects student safety or well-being or is not reasonably capable of being cured. If deficiencies are not remedied, HISD may terminate the agreement consistent with contract terms, including termination effective at the end of the then-current school year when required timelines are met. HISD documents findings, required corrective actions, and final determinations to ensure transparency and compliance with governing requirements.

Local Campus Partner Application and Evidence of Evaluation

Districts must submit this attachment for **each partnership school** under consideration for Partnership School benefits.

Districts must submit two items:

- **Attachment B1: Local Campus Partner Application:** The application that the partner organization completed and submitted to the district review panel for evaluation.
- **Attachment B2: Local Campus Partner Application Evidence of Evaluation:** The evidence that the district review panel thoroughly evaluates the proposal from the potential operator. This includes documents that demonstrate how the application was evaluated/scored, what areas needed to be addressed in the capacity interview, and notes from the capacity interview.

Attachments should be titled and ordered by partnership school/campus name. For example, a district submitting two partnerships for approval would title attachments as follows:

- Campus 1_Attachment B1_Local Campus Partner Application
- Campus 2_Attachment B1_Local Campus Partner Application
- Campus 1_Attachment B2_Local Campus Partner Application Evidence of Evaluation
- Campus 2_Attachment B2_Local Campus Partner Application Evidence of Evaluation

Partnership Performance Contract

Districts must submit this attachment for **each partnership school** under consideration for Partnership School benefits.

Attachment C: Partnership Performance Contract: the board-approved contract between school district and partner organization to operate the partnership school.

Attachments should be titled and ordered by partnership school/campus name. For example, a district submitting two partnerships for approval would title attachments as follows:

- Campus 1_Attachment C_Partnership Performance Contract
- Campus 2_Attachment C_Partnership Performance Contract

Partnership Assurances Documentation

The partnership assurances document serves as a commitment from the district superintendent and board of trustees that all proposed partnerships do not present a conflict of interest with the district and that the district has done its due diligence to ensure that each partner is capable of the work it has agreed to perform in the performance contract. TEA will monitor continued adherence to these assurances while the partnerships received Texas Partnership benefits.

The Superintendent of the district shall initial each and all assurances within this document to confirm awareness and understanding of responsibilities established herein.

I. Governance

JMM The district assures that the governing body of each operating partner is not and shall not be comprised of any members of the independent school district's board of trustees, the superintendent, or staff responsible for evaluating the partnership application or overseeing the performance contract.

JMM The district assures that the majority of the governing body of each operating partner is not comprised of district staff.

JMM The district assures that no member of the governing body of each partner will be related within the first degree of affinity or consanguinity with any members of the independent school district's board of trustees, the superintendent, or staff responsible for granting the charter or contract to partner to operate or overseeing the performance contract.

JMM The district assures that all members of the governing body of each operating partner have passed and will continually pass the district's conflict of interest checks.

JMM The district assures that the district has not appointed a majority of the members of the governing board of each operating partner.

JMM The district assures that the governing body of the operating partner will participate in board governance training provided by TEA, or a vendor recommended by TEA.

JMM The district assures that it will submit the names and background information for all partner board members to the agency annually.

II. Performance Contract

JMM The district assures that the district and each proposed operating partner meet the requirements to contract to partner to operate, as outlined in TAC §97.1075 (relating to Contracting to Partner to Operate a Campus under Texas Education Code, §11.174, as amended).

JMM The district assures that the district is aware that to maintain benefits eligibility, the performance contract must meet the eligibility requirements described in this application and all

statutory requirements for the duration of the partnership, and that all performance contract amendments must be submitted to the agency within 30 days.

III. Authorizing Policies and Practices

JMM The district assures that it will continuously meet the requirements to authorize an operating partner, as outlined in TAC §97.1079 (relating to Determination Processes and Criteria for Eligible Entity Approval under Texas Education Code §11.174, as amended).

JMM The district assures that it will not authorize performance contracts to partner to operate a campus that are contingent upon overall campus academic performance ratings, or the receipt of additional funding relate to TEC §11.174.

IV. Operating Partner Capacity

JMM The district assures that each operating partner has reasonable staff capacity, including at least one full-time equivalent employee in place at the time this application is submitted, necessary to oversee the operation of the campus(s).

I, the undersigned, hereby certify that the district has authorized me to provide these assurances as noted by my initials on this and all previous pages.

F. Mike Miles

Printed Name of District Superintendent

JMM

Signature of District Superintendent

03-26-2026

Date

Ric Campo

Printed Name of President (Board of Trustees)

RC

Signature of President (Board of Trustees)

03-26-2026

Date

The background of the entire page is a photograph of a classroom. In the foreground, two young boys are looking towards the right. One boy is wearing a dark shirt, and the other is wearing a striped shirt. In the background, a teacher with long dark hair and glasses is smiling and gesturing with her hands while talking to a group of children. The children are also smiling and looking towards the teacher. The overall atmosphere is positive and educational.

Texas Partnerships Benefits Application

For Texas Partnerships Benefits that begin in the 2026-2027 school year



TEXAS PARTNERSHIPS (SB 1882) BENEFITS APPLICATION

For Texas Partnerships Benefits that begin in the 2026-2027 school year

Application Instructions

This document is the application for Texas Partnerships (SB 1882) benefits. For more information about Texas Partnerships, including a description of different types of partnerships, partnership benefits, eligibility requirements, and how TEA will evaluate applications, please download the Texas Partnerships Guide from the [Texas Partnerships website](#).

TEA will accept applications on a rolling basis, with two priority deadlines and one final deadline. Districts and proposed operating partners must also attend mandatory webinars, and districts must have their local charter authorizing board policy and their local campus application and scoring rubric approved prior to submitting the full benefits application package. Table 1, below, shows the timeline for application package submissions.

Table 1. Application Timeline for Texas Partnerships Benefits

Action	Date
District and proposed operating partner attend required Texas Partnerships Overview webinar	District and partner representatives will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 15, 2025, 3-4:30p• July 22, 2025, 9a-10:30a• September 9, 2025, 3p-4:30p• September 16, 2025, 9a-10:30a
District and proposed operating partner attend required Texas Partnerships Performance Contract webinar	District and partner representatives will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 16, 2025, 3p-4p• July 23, 2025, 9a-10a• September 10, 2025, 3p-4p• September 17, 2025, 9a-10a
District attends required Submitting a Successful Texas Partnerships Application webinar	District representative will attend <u>one</u> of the following sessions: <ul style="list-style-type: none">• July 17, 2025, 3p-4p• July 24, 2025, 9a-10a• September 11, 2025, 3p-4p• September 18, 2025, 9a-10a
District submits non-binding mandatory Letter of Intent to Apply for Texas Partnerships Benefits <i>The deadline to submit the Letter of Intent is the same for all application due dates. TEA will not accept a Texas Partnerships Benefits Application Package from a district unless the</i>	No later than Friday, December 5, 2025, at 5 p.m. (Central Time)

<i>district has completed a Letter of Intent by the required deadline.</i>	
District submits locally-developed charter authorizing policy, local campus partner application, and/or local application scoring rubric OR notifies TEA that the district has adopted TEA models	No later than Friday, December 5, 2025, at 5 p.m. (Central Time), or no later than 5 working days prior to local campus application release (whichever date is earlier)
Texas Partnerships Benefits Application Package Priority Deadline 1 <i>NOTE: Charter School Program Start-Up Grant funding may be available per approval of extensions</i>	Monday, December 15, 2025, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than February 13, 2026)</i>
Texas Partnerships Benefits Application Package Priority Deadline 2 <i>Districts that submit by this date do not have to submit Attachment D: Pre-Opening Checklist and Implementation Plan</i>	Friday, January 30, 2026, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than March 31, 2026)</i>
Texas Partnerships Benefits Application Final Deadline <i>Districts that submit in February or March must include Attachment D: Pre-Opening Checklist and Implementation Plan with their application</i>	Tuesday, March 31, 2026, at 5 p.m. (Central Time) <i>TEA notifies district of eligibility (approval or request for additional information) no later than May 29, 2026)</i>

A complete application includes the following documents.

- ☐ Completed Texas Partnership Application Template (this document)
- ☐ Attachment A: Local Board-Approved Charter Authorizing Policy
- ☐ Attachment B1: Local Campus Partner Application (for each partnership school)
- ☐ Attachment B2: Local Campus Partner Application Evidence of Evaluation (for each partnership school)
- ☐ Attachment C: Partnership Performance Contract (for each partnership school)
- ☐ Attachment D: Pre-Opening Checklist and Implementation Plan (for each partnership school; only required if submitting after January 30, 2026)

Districts can submit a single application for multiple partnership schools but must submit separate attachments B and C for each school.

Please submit the completed application package to TEA using the following steps:

- Save this Partnership Application template as a PDF document titled with district name and document type (e.g., *District Name-Partnership Application*), and
- Please save required attachments as PDF documents. See application instructions for file naming convention.
- Email all files to TXP@tea.texas.gov with the subject line as follows - [Texas Partnerships Benefits Application Package District Name].

Specifications

- Applicants **must** submit proposals electronically and use the template provided.
- Only responses placed within the text boxes provided will be considered for evaluation activities.
- Late submissions will not be accepted.
- Submissions from districts that did not submit a letter of intent by Friday, December 5, 2025 will not be accepted.
- Submissions from districts that did not attend all required webinars will not be accepted.
- Submissions that include an operating partner that did not attend all required webinars will not be accepted.
- Submissions that include a partner that does not have a governing board of at least 3 members and at least one full time staff at the time the application package is submitted will not be accepted.

District Information

District Name	Houston Independent School District (HISD)
Superintendent Name	Mike Miles
Superintendent Email and Phone Number	Mike.Miles@houstonisd.org 713-556-6305
Primary District Point of Contact (if different from superintendent)	Orlando Riddick
Primary District Point of Contact Email and Phone Number (if different from superintendent)	Orlando.Riddick@houstonisd.org
Submission Date	March 31, 2026

Operating Partner and Campus Information

Please complete the following information for each operating partner organization. Copy and paste the full table below if this application includes more than one operating partner.

Name of Partner Organization: Click or tap here to enter text.		
Authorizing statute for this partnership¹: §12.0522		
Primary Partner Contact Information		
Name: Orlando Riddick	Role: Chief of Strategic Initiatives	Email: Orlando.Riddick@houstonisd.org
Eligible Organization:		
<i>To be eligible for Texas Partnerships benefits, the district must contract with the governing body of an open-enrollment charter school (authorized by the state of Texas) or an entity that meets the criteria in TEC 12.101(a).</i>		
Organization status: Tax exempt organization under Section 501(c)(3)		
Please describe how the district verified this organization's status: HISD verified the operating partner's eligibility by confirming the organization's legal status as either (1) the governing body of an open-enrollment charter school authorized by the state of Texas, or (2) an entity meeting the criteria in TEC 12.101(a). Verification included review of the partner's formation documents and governance structure, evidence of tax-exempt status where applicable, and confirmation that the organization is eligible to hold and execute a performance contract to operate an in-district charter campus under TEC Chapter 12, Subchapter C. HISD also conducted conflict-of-interest screening aligned to district assurances and required governance independence, including checks to ensure no prohibited overlap with district decision-makers or evaluators.		

¹ District boards may grant charters under Texas Education Code, Chapter 12, Subchapter C in the following ways:

- TEC 12.052: the board grants a charter to parents and teachers of a campus or campus program after receiving a petition from parents and teachers at the campus
- TEC 12.0521: the board grants a charter for a new campus or to an entity that has entered into contract with the district
- TEC 12.0522: the board grants a district charter to a campus (Enrollment at these campuses cannot exceed 15% of the district's total student enrollment unless the campus is a turnaround campus, is part of a feeder pattern of district charters, or the district receives a waiver from the agency. TEA will review attendance counts at fall snapshot to see if the district has exceeded the 15% threshold.)
- TEC 12.053: the board grants a charter to parents and teacher at two or more campuses for a cooperative charter program after receiving a petition from parents and teachers at the campus

Operating Partner Board:

Each operating partner organization must have at least 3 board members. Add rows as needed.

Board Member Name	Position on the board	Email (Required for board president only)
1. HSPVSA - Janis Jarosz	Chair	
HSPVA - Frank Angelle,	Treasurer	
HSPVA - M. Kaye DeWalt	Secretary	
2. Challenge ECHS - Anne McClellan	President	
Challenge ECHS - Justin Fuentes	Treasurer	
Challenge ECHS – Mike Webster	Secretary	
3. Energy - Julie Zachary	TBD	
Energy - Lucie Tredennick	TBD	
Energy - Kathy Kahanek	TBD	
4. HAIS - Jennifer Kapral	TBD	
HAIS - Brian Gaston	TBD	
HAIS - Brenda Rangel	TBD	

Campus Information:

Provide the following information about the campus(es) this partner will manage. If this a new campus for which there is no CDCN, type "new" in the CDCN column. Add rows as needed if this partner will manage multiple campuses in the district.

Campus Name:	County District Campus Number:	Grade levels served in Year 1:	Grade levels served at capacity:
1. Kinder High School for the Visual and Performing Arts (HSPVA)	1. 101912025	1. 9-12	1. 9-12
2. Challenge Early College High School (Challenge ECHS)	2. 101912323	2. 9-12	2. 9-12
3. Energy Institute High School (Energy)	3. 101912468	3. 9-12	3. 9-12
4. Houston Academy for International Studies (HAIS)	4. 101912348	4. 9-12	4.9-12

Operating Partner Staff Member(s) Responsible for Campus Management (including principal evaluation)²:

- Kinder High School for the Visual and Performing Arts – Dr. Priscilla Rivas (Anticipated Hire Date 7/1/2026)
- Challenge Early College High School – Jose Santos (Anticipated Hire Date 7/1/2026)
- Energy Institute High School – Lori Lambropoulos (Anticipated Hire Date 7/1/2026)
- Houston Academy for International Studies – Melissa Jacobs (Anticipated Hire Date 7/1/2026)

Turnaround Partnership Information

Only required for districts seeking a pause in accountability sanctions under TEC 11.174(f)

² If campus management staff has not yet been hired, enter the anticipated hire date. Texas Partnership benefits will not be awarded until TEA has received verification that the partner organization has hired this staff member. If campus management staff is currently employed by the district, the district must provide evidence (attach to this application) that this staff is:

- under contractual obligation with the operating partner board, and
- solely dedicated to planning the launch of the campus at the time of application for benefits.

1. If any of the operating partners above will manage a turnaround campus (a campus whose most recent accountability rating was an F), please describe the operating partner's prior experience managing campuses. Include how many campuses the partner managed, the number of years they have managed those campuses, and the organization's track record of managing campuses to academic success or significantly improving the academic performance of the campuses.

N/A

Click or tap here to enter text.

2. How did the district define a track record of academic success and/or significant improvement in academic outcomes?

N/A

Click or tap here to enter text.

3. Has this organization successfully turned a campus around in the past (i.e., improved campus performance from an unacceptable rating to an A, B, or C rating)? If yes, please describe. If no, please describe how the district evaluated the partner organization's ability to successfully execute a turnaround strategy at the district campus.

N/A

Click or tap here to enter text.

Charter Authorizing Policies and Practices

Districts seeking approval for partnership benefits must provide evidence of high-quality district charter authorizing policies and practices. Districts must submit their local, board-approved partnership authorizing policy as attachment A to this application. Districts must also respond to the questions below.

Required:

- **Attachment A:** Local Charter Authorizing Policy (*as currently adopted by local district school board*). Districts are required to adopt TEA's Model Local Charter Authorizing Policy or a similar policy approved by TEA. If the district is not using the Model Local Charter Authorizing Policy, the district's policy must be approved before the agency (by December 4, 2023 or no later than 5 working days prior to local campus application release, whichever is earlier).
- **Respond to** questions in the Summary of Charter Authorization Policies and Practices below.

Summary of Charter Authorizing Policies and Practices

All districts must respond to the following questions about their local authorizing policies and practices. All questions under each section must be addressed. **Answers must explain the contents of the district board policy or the performance contract; copy and pasting sections of the board policy or contract is insufficient.**

Authorizing Mission and Core Vision

1. Describe the mission and vision of the district's efforts to authorize new charter campuses and programs.

HISD's work to authorize in-district charter campuses is grounded in a clear district vision and mission. The vision is to establish high-quality autonomous schools that expand choice and prepare every student for the 2035 workplace and world. The mission is to expand high-quality autonomous schools that increase choice, foster innovation, and strengthen student outcomes.

In service of this vision, HISD's approach to authorizing charter campuses is to expand and sustain high-quality learning options by pairing meaningful school-level autonomy with rigorous, enforceable accountability for student outcomes and equity. This work is grounded in a Defined to Earned Autonomy Framework, in which autonomy is earned and intentionally structured so campuses can control the core variables needed to deliver their educational model, while the district maintains clear guardrails that protect students, ensure compliance, and preserve system coherence.

This approach enables innovation and specialized programming while avoiding the inequities and inefficiencies that can result from autonomy without strong accountability. The framework establishes a performance-based pathway in which higher-performing campuses may qualify for Level 5 autonomy, ensuring that autonomy is awarded intentionally and sustained only when student outcomes and equity commitments remain strong.

Consistent with EL(LOCAL), HISD recognizes external partnerships for educational services (Texas Partnerships) as External Performance Contract Campuses operated under a Board-approved performance contract. These campuses are exempt from instructional and academic rules and Board policies except as specified in the contract, allowing for increased flexibility while maintaining clear expectations for performance and accountability.

- 2. Explain how work to authorize new charter campuses will focus on improving student learning, increasing choice, creating professional opportunities to attract teachers, establishing new forms of accountability, and encouraging innovative learning methods.**

HISD's authorizing approach improves learning by requiring explicit student outcome goals, progress monitoring, and consequences for underperformance through the performance contract. It increases choice by enabling distinct campus models and specialized programming to operate within HISD through authorized in-district charters. It supports professional opportunities by allowing the operating partner to implement its instructional program and campus operating model, including staffing, scheduling, and professional learning routines, within applicable law and contract guardrails. It establishes new forms of accountability by tying renewal and continuation to measurable performance targets, including required reporting and improvement planning when targets are not met. It encourages innovation by granting exemptions to the fullest extent permitted under TEC Chapter 12, Subchapter C, while maintaining a small set of non-negotiable district parameters (such as compliance requirements, calendar, assessments, and instructional expectations that ensure TEKS coverage and student safety). Under the *Earned Autonomy Framework*, Level 5 autonomy is reserved for campuses demonstrating sustained excellence and equity, which strengthens accountability by connecting the highest levels of flexibility to verified performance and narrowing achievement gaps, not merely to compliance with processes.

In alignment with EL(LOCAL), HISD's application and approval process includes a comprehensive written application, a rigorous review by a review committee with conflict-of-interest checks, a capacity interview with partner representatives, superintendent recommendation, and Board approval by vote, ensuring innovation is paired with documented readiness and public governance.

- 3. Explain how the district's efforts to authorize new charter campuses will support the district's broader strategy to improve student outcomes.**

HISD's broader strategy is to raise student achievement, narrow achievement gaps, and prepare students for future success while maintaining strong oversight and equity safeguards. SB 1882 partnerships support this strategy by enabling high-performing and unique schools to gain additional autonomy (including a Level 5 autonomy approach for qualifying campuses) while maintaining clear district parameters and enforceable performance expectations. Through the performance contract, HISD aligns autonomy to accountability, ensuring that innovative campus models contribute to systemwide improvement without compromising compliance, student protections, or fiscal stewardship. HISD's *Level 5 Earned Autonomy Framework* operationalizes this strategy by setting objective entry criteria for expanded autonomy (sustained "A" accountability performance and controlled achievement gaps) and requiring continued performance and gap reduction targets over the contract term, ensuring the partnership advances both excellence and equity districtwide.

Commitment and Capacity

- 1. Describe the capacity and resources dedicated to the district's charter authorizing process, including the evaluation, nomination, and ongoing monitoring of district charter campuses.**

HISD has established a cross-functional authorizing structure to ensure rigorous evaluation, effective oversight, and consistent enforcement of performance contracts. The Chief of Strategic Initiatives leads the district's authorizing work, including application evaluation, performance monitoring, and partnership oversight. The Superintendent provides final approval recommendations and ensures alignment with district

strategy, and the Board of Managers approves all performance contracts as well as renewal and non-renewal decisions. HISD's authorizing work is supported through a matrixed structure that includes dedicated leadership and functional expertise across key departments. Legal Services supports contract development and compliance enforcement. The Finance team provides financial oversight, including budget monitoring and audit alignment. Academic teams support monitoring of instructional performance and student outcomes. Operations teams support facilities, staffing, and operational compliance. This structure allows HISD to apply domain-specific expertise to each component of the authorizing process while maintaining clear accountability for overall performance. The model enables consistent monitoring across multiple campuses, ensures that performance expectations are enforced with fidelity, and provides the capacity necessary to sustain high-quality authorizing practices over time.

2. Identify the key members of the district's leadership team by name and title and describe their individual and collective qualifications for authorizing, monitoring, and evaluating the district charter(s).

Mike Miles, Superintendent, provides executive leadership and ensures partnerships align to HISD's mission, defined to earned autonomy parameters, and performance expectations. Orlando Riddick, Chief of Strategic Initiatives, serves as the district point of contact and leads the authorizing process, cross-department coordination, and the monitoring structure aligned to the performance contract. HISD Legal Services supports statutory alignment, contract compliance, and enforceable remedies. HISD Finance supports fiscal stewardship, reporting requirements, and audit-aligned controls. HISD academics and school support functions support performance monitoring, progress reporting, and compliance with state and federal program requirements. Collectively, this team brings expertise in governance, contract management, accountability systems, operational readiness, and compliance.

3. Identify the district employee(s) that is/are fully dedicated to overseeing the authorizing and ongoing monitoring of in-district charters, including the date the employee(s) began in this role.

Orlando Riddick, Chief of Strategic Initiatives, and Caitlin Butler, Deputy Chief of staff, oversee the authorizing and ongoing monitoring of in-district charters, including coordination, evaluation, communication, consultation, contracting alignment, and implementation oversight. Performance and contractual oversight support is provided by Legal Services, Finance, Academics, and Operations to execute autonomy, monitoring, compliance, and reporting expectations defined in the performance contract. He began his role as Chief of Strategic Initiatives October of 2026, and Caitlin Butler began her role in support of SB1882 partners in November of 2026.

Application and Review Process

1. Describe the process for evaluating and awarding proposals submitted under TEC Chapter 12, Subchapter C. Please include a description of:

- **the questions asked in the operator application (if the district used the TEA model application, please indicate in this section),**
 1. HISD evaluated proposals through a structured process using the TEA Cycle 9 Local Campus Partner Application model. Applicants completed the local campus partners application (TEA model-aligned), which requires clear evidence of the academic model, governance and decision

rights, staffing and operational plan, financial plan and controls, compliance readiness, and measurable performance commitments.

- **the rubric used by the district’s review panel to evaluate partner applications, including how the district evaluated the operating partner’s academic model, the operator’s strengths and weaknesses and past academic performance, and**

1. A district review panel evaluates each application using TEA’s scoring rubric that assesses the strength of the academic model, organizational capacity, governance, financial stewardship, and operational readiness, including identification of strengths, weaknesses, and risk areas.

- **the process the district used for conducting capacity interviews.**

1. HISD evaluates proposals through a structured local process. Applicants complete the local campus partners application (TEA model-aligned), which requires clear evidence of the academic model, governance and decision rights, staffing and operational plan, financial plan and controls, compliance readiness, and measurable performance commitments.

2. A district review panel from the Chief of Strategic Initiatives, Chief of Staff, Chief of Schools, Central Division offices along with a representative from Regio 4’s Education Service Center evaluated each application using TEA’s scoring rubric that assesses the strength of the academic model, organizational capacity, governance, financial stewardship, and operational readiness, including identification of strengths, weaknesses, and risk areas.

3. HISD then conducts capacity interviews to validate written evidence, test implementation feasibility, clarify governance and autonomy practices, and confirm the operating partner can meet the performance contract’s academic, governance, financial, and compliance requirements. A team from the Chief of Strategic Initiatives, Chief of Staff, Chief of Schools, and Central Division offices along with a member from the Region 4’s Education Service Center met to conduct these interviews. Final award decisions are aligned to evidence and readiness to deliver outcomes under contract-based accountability.

2. Describe the process undertaken to provide opportunities for the public to learn about potential charter applications prior to approval decisions by the local board.

Community engagement for the SB 1882 partnerships was intentional, campus-led, and ongoing throughout the development of the applications and contract discussions. Each campus hosted community meetings to provide partnership updates, share the purpose and scope of the performance contract, and receive feedback from families and stakeholders. Engagement also included administrator and teacher leader meetings, campus-wide teacher meetings, and regularly scheduled site-based decision-making team meetings to ensure staff voice and alignment on the proposed autonomy, supports, and accountability expectations. Campuses also leveraged existing family engagement structures through Parent Teacher Organization (PTO) and Parent Teacher and Student Association (PTSA) meetings, as well as informal “coffee with the principal,” to expand access for working families and ensure two-way communication. To keep parents informed between meetings, campuses used ParentSquare, the district and campus messaging system, to provide timely updates, share meeting information and materials, and maintain consistent communication as partnership planning progressed.

HISD provided opportunities for the public to learn about proposed partnerships through required board action processes conducted under open meetings requirements, including agenda publication and public notice in advance of authorization and performance contract approval. HISD also ensured that board materials and district communications provided stakeholders with visibility into the purpose of the partnership,

governance structure, and the accountability commitments included in the performance contract prior to final action.

3. Describe the process for communicating application evaluation criteria and approval/denial decisions, including the basis for such decisions, to charter applicants.

HISD communicated application evaluation criteria and approval/denial decisions through a transparent, structured process with frequent, documented touchpoints. Evaluation criteria were provided in advance through the published district application and scoring rubric, and each partnership received ongoing rubric-aligned feedback throughout development to clarify expectations and strengthen evidence prior to final decisions. Communication occurred through standing weekly 1:1 meetings with each partnership and its leadership team to review progress against the criteria, address questions, and confirm required deliverables. In addition, HISD facilitated weekly whole-group partnership meetings with all partners to reinforce common expectations, timelines, and evaluation standards, as well as a weekly interoffice huddle with cross-department leaders to ensure consistent guidance and alignment across academics, finance, operations, legal, and communications. Progress, evaluation findings, and decision points were also reviewed in bi-weekly meetings with central office leadership, and Superintendent Miles received regular briefings on partnership progress and deliverables through Monday cabinet updates. Where applicable, partners also received timely feedback through TEA office hours to resolve technical questions and ensure submissions aligned to state requirements. Collectively, these routines ensured that partners understood the evaluation criteria, received clear feedback tied to those criteria, and were informed of approval conditions or denial rationale based on documented evidence and readiness to execute under the performance contract.

In addition, HISD communicated application requirements and evaluation criteria through the published application and scoring rubric. Following evaluation, HISD provided applicants with rubric-anchored feedback and capacity interview findings, including documented strengths, weaknesses, and any conditions required to proceed to contracting. Approval or denial decisions are grounded in evidence of academic model strength, capacity to implement, governance readiness, financial controls, compliance readiness, and the ability to meet measurable performance targets under the contract.

Oversight and Evaluation

1. Describe the relationship and key responsibilities between the school district board of trustees, the district administration, and the charter holder/operating partner.

The HISD Board of Managers, and successor governance structure as applicable, retains authorization authority and approves the partnership charter and performance contract. District administration implements the authorizing policy, conducts monitoring and compliance oversight, and enforces performance contract terms and remedies. The operating partner operates as an independent contractor responsible for day-to-day campus operation and implementation of the educational model within the autonomy granted by the contract and applicable law, including governance through its own board. The performance contract defines responsibilities, reporting requirements, and consequences to ensure transparency and accountability. Consistent with EL(LOCAL), the Board's role includes approval of the external performance contract for each campus and oversight decisions related to renewal, probation, and termination based on academic, financial, operational, and governance standards set forth in the performance contract.

2. Describe the areas of autonomy and flexibility provided to charter campuses in the district. Specifically, identify district policies that will be identified in the performance contract as being applicable to the

charter campus for which the campus could otherwise be exempt under TEC, Chapter 12, Subchapter C.

HISD grants autonomy in a manner consistent with TEC Chapter 12, Subchapter C, and the performance contract, with the school exempt from laws and rules to the fullest extent allowed and exempt from district policies except those specifically identified as applicable in the agreement. HISD's approach aligns to the Earned Autonomy Framework: autonomy is earned and structured so the campus can control the key variables that produce the desired model and outcomes, while maintaining non-negotiable parameters that protect students and preserve system coherence. Those parameters include compliance with board policy, as agreed upon and or updated by the OP, and state and federal law. The OP has full autonomy over areas such as; the district calendar, districtwide assessments, district oversight, district compliance requirements, and instructional expectations. Within these guardrails, the operating partner has broad decision rights over school operations and the instructional program, including program design, curriculum decisions beyond minimum state requirements, instructional delivery model, master schedule, staffing, budget planning, purchased services as specified in the contract, staffing, and facility. For Level 5 earned autonomy campuses, HISD's Earned Autonomy Framework establishes objective performance-based thresholds and ongoing expectations that preserve autonomy: eligibility is tied to sustained "A" performance and defined limits on achievement gaps, and continued autonomy is contingent on maintaining an "A" rating and reducing the achievement gaps between black and white students and Hispanic and white students in math and reading to the contract's required target over the term of the contract. Per EL(LOCAL), once an external performance contract is granted, the campus is exempt from Board policies except those specified in the performance contract; accordingly, the contract will include a list of District policies with which the campus must comply, including, at minimum: FFH(LOCAL), DAA(LOCAL), DBAA(LOCAL), DI(LOCAL), DIA(LEGAL) and DIA(LOCAL), DG(LEGAL), DGA(LEGAL) and DGA(LOCAL), FFI(LEGAL) and FFI(LOCAL), CQ(LEGAL) and CQ(LOCAL), and AE(LOCAL) limited to the sections "Goals and Progress Measures" and "Constraints and Constraint Progress Measures."

3. Describe the district's process for routinely monitoring accountability and compliance, as defined in the charter contract. Include the frequency and timeline for all monitoring activities.

HISD implements a structured, performance-driven oversight system to ensure that school-level autonomy is consistently matched with accountability for student outcomes, financial stewardship, and operational execution. Oversight is grounded in the performance contract and operates on a defined cadence with clear performance triggers and corresponding actions.

HISD conducts monthly internal monitoring of leading indicators, including student attendance, enrollment stability, staffing levels, and interim assessment data. These reviews are conducted by the operating partner and campus leadership, with required submission of key data to the district for review.

HISD conducts quarterly formal performance reviews to assess progress toward annual contract goals. These reviews include analysis of academic performance (interim assessments and course outcomes), financial performance (budget-to-actuals and expenditure tracking), and operational metrics (staff retention and enrollment stability). Findings from each quarterly review are documented and used to determine whether the campus is on track to meet annual performance targets.

Operating partners are required to submit mid-year (January) and end-of-year (June) performance reports to the Superintendent. These reports include comprehensive updates on academic outcomes, financial health, staffing, and implementation of the approved school model.

HISD conducts an annual accountability review aligned to state accountability outcomes and contract-specific performance goals. Based on this review, campuses may continue in good standing, be placed on an improvement plan, or enter a probationary status.

Clear performance triggers guide district action. Failure to meet interim growth targets in two consecutive quarters results in a required improvement plan. Failure to meet annual performance targets may result in probationary status and increased monitoring. Material financial variances greater than 10 percent from the approved budget without justification result in a required financial review and corrective action plan. Operational concerns, including elevated staff vacancy rates or enrollment instability, may trigger targeted intervention and escalation of oversight.

All monitoring activities, findings, and required actions are formally documented to ensure transparency and alignment with contract enforcement.

4. Outline any district data collection requirements, including a reporting schedule, site-visits, mandated assessments, and any required student-management system.

HISD requires consistent and standardized data collection and reporting to ensure effective oversight, informed decision-making, and compliance with all state and federal requirements.

Operating partners are required to utilize district-approved student information systems and data platforms and must submit all required data in alignment with PEIMS timelines and state reporting requirements. All state and district assessments must be administered in accordance with district expectations.

Operating partners must submit data according to the following cadence: monthly submission of key operational and leading indicator metrics, quarterly submission of academic, financial, and operational performance reports, and bi-annual submission of comprehensive mid-year and end-of-year performance reports. HISD conducts a full annual accountability and compliance review aligned to state accountability outcomes and contract expectations.

HISD conducts at least one formal monitoring site visit annually, with additional visits conducted as needed based on performance. Site visits include classroom observations, leadership meetings, and review of compliance and operational practices.

This data collection and reporting structure ensures that HISD maintains real-time visibility into campus performance and can take timely and appropriate action when performance concerns arise.

Revocation and Renewal

1. Describe the charter terms and evidence required for renewal of a charter agreement.

HISD utilizes a performance-based renewal process to determine whether a partnership contract will be extended. Renewal decisions are grounded in objective performance outcomes, compliance with contractual obligations, and sustained implementation of the approved school model.

To be eligible for renewal, campuses must demonstrate strong academic performance, including meeting or exceeding state accountability standards and contract-specific performance goals. Campuses must also demonstrate measurable progress in student outcomes, including both achievement and growth. In addition, campuses must maintain sound financial practices, including responsible budget management and successful completion of required audits, and must remain in full compliance with all legal, reporting, and contractual requirements.

HISD initiates the renewal process during Year 4 of the contract term, beginning with a preliminary review of performance trends and risk indicators. If performance concerns are identified, the district provides formal notification and may require additional monitoring or intervention. A final performance evaluation is conducted during Year 5, and a renewal recommendation is developed based on cumulative performance over the contract term.

HISD provides formal notice of renewal or non-renewal no later than April 1 of the final contract year, in accordance with state requirements. Renewal decisions are based on sustained performance over time rather than a single year of results.

2. Describe the criteria and a specific timeline for non-renewal of a charter agreement.

A campus may be subject to non-renewal if it fails to meet academic performance expectations over the course of the contract term, demonstrates persistent performance deficiencies despite intervention, or fails to meet financial or compliance requirements.

HISD identifies campuses at risk of non-renewal through its ongoing monitoring processes and provides notice and opportunity for improvement prior to making a final determination. If performance concerns persist, the district issues formal notification of non-renewal risk during Year 4 of the contract term.

Formal notice of intent not to renew is provided no later than April 1 of the final contract year, in alignment with state requirements and contract terms.

3. Describe the process for establishment of a closure protocol to be used in the event of non-renewal of a charter agreement.

HISD establishes a closure and transition protocol to ensure continuity of services, protection of student rights, and orderly transfer of operations. The protocol includes family communications, continuity planning for students requiring special services, records transfer consistent with law, inventory and asset reconciliation, staffing transition planning, and a defined operational handoff plan to minimize disruption. The district may require transition cooperation and documentation to ensure students experience minimal disruption and compliance obligations are fully met.

4. Describe the criteria for revocation of a charter agreement.

In cases of potential revocation, HISD follows a structured, contract-aligned process to ensure due process and timely intervention.

Upon identification of a material issue, HISD issues a formal notice of concern outlining the specific deficiencies and required corrective actions. The operating partner is provided a defined cure period, typically ranging from 30 to 90 days depending on the severity of the issue.

Following the cure period, HISD conducts a follow-up review to assess whether corrective actions have been successfully implemented. If deficiencies are not resolved, the district may proceed with termination of the contract in accordance with contract provisions.

When feasible, termination is structured to occur at the end of the school year to minimize disruption to students. All actions are documented to ensure transparency and alignment with legal and contractual requirements.

5. Describe the procedure and a specific timeline for revocation of a charter agreement.

HISD follows the performance contract's termination provisions, including written notice of material breach and an opportunity to cure within the timeframe established in the contract, except when the breach affects student safety or well-being or is not reasonably capable of being cured. If deficiencies are not remedied, HISD may terminate the agreement consistent with contract terms, including termination effective at the end of the then-current school year when required timelines are met. HISD documents findings, required corrective actions, and final determinations to ensure transparency and compliance with governing requirements.

Local Campus Partner Application and Evidence of Evaluation

Districts must submit this attachment for **each partnership school** under consideration for Partnership School benefits.

Districts must submit two items:

- **Attachment B1: Local Campus Partner Application:** The application that the partner organization completed and submitted to the district review panel for evaluation.
- **Attachment B2: Local Campus Partner Application Evidence of Evaluation:** The evidence that the district review panel thoroughly evaluates the proposal from the potential operator. This includes documents that demonstrate how the application was evaluated/scored, what areas needed to be addressed in the capacity interview, and notes from the capacity interview.

Attachments should be titled and ordered by partnership school/campus name. For example, a district submitting two partnerships for approval would title attachments as follows:

- Campus 1_Attachment B1_Local Campus Partner Application
- Campus 2_Attachment B1_Local Campus Partner Application
- Campus 1_Attachment B2_Local Campus Partner Application Evidence of Evaluation
- Campus 2_Attachment B2_Local Campus Partner Application Evidence of Evaluation

Partnership Performance Contract

Districts must submit this attachment for **each partnership school** under consideration for Partnership School benefits.

Attachment C: Partnership Performance Contract: the board-approved contract between school district and partner organization to operate the partnership school.

Attachments should be titled and ordered by partnership school/campus name. For example, a district submitting two partnerships for approval would title attachments as follows:

- Campus 1_Attachment C_Partnership Performance Contract
- Campus 2_Attachment C_Partnership Performance Contract

Partnership Assurances Documentation

The partnership assurances document serves as a commitment from the district superintendent and board of trustees that all proposed partnerships do not present a conflict of interest with the district and that the district has done its due diligence to ensure that each partner is capable of the work it has agreed to perform in the performance contract. TEA will monitor continued adherence to these assurances while the partnerships received Texas Partnership benefits.

The Superintendent of the district shall initial each and all assurances within this document to confirm awareness and understanding of responsibilities established herein.

I. Governance

JMM The district assures that the governing body of each operating partner is not and shall not be comprised of any members of the independent school district's board of trustees, the superintendent, or staff responsible for evaluating the partnership application or overseeing the performance contract.

JMM The district assures that the majority of the governing body of each operating partner is not comprised of district staff.

JMM The district assures that no member of the governing body of each partner will be related within the first degree of affinity or consanguinity with any members of the independent school district's board of trustees, the superintendent, or staff responsible for granting the charter or contract to partner to operate or overseeing the performance contract.

JMM The district assures that all members of the governing body of each operating partner have passed and will continually pass the district's conflict of interest checks.

JMM The district assures that the district has not appointed a majority of the members of the governing board of each operating partner.

JMM The district assures that the governing body of the operating partner will participate in board governance training provided by TEA, or a vendor recommended by TEA.

JMM The district assures that it will submit the names and background information for all partner board members to the agency annually.

II. Performance Contract

JMM The district assures that the district and each proposed operating partner meet the requirements to contract to partner to operate, as outlined in TAC §97.1075 (relating to Contracting to Partner to Operate a Campus under Texas Education Code, §11.174, as amended).

JMM The district assures that the district is aware that to maintain benefits eligibility, the performance contract must meet the eligibility requirements described in this application and all

statutory requirements for the duration of the partnership, and that all performance contract amendments must be submitted to the agency within 30 days.

III. Authorizing Policies and Practices

JMM The district assures that it will continuously meet the requirements to authorize an operating partner, as outlined in TAC §97.1079 (relating to Determination Processes and Criteria for Eligible Entity Approval under Texas Education Code §11.174, as amended).

JMM The district assures that it will not authorize performance contracts to partner to operate a campus that are contingent upon overall campus academic performance ratings, or the receipt of additional funding relate to TEC §11.174.

IV. Operating Partner Capacity

JMM The district assures that each operating partner has reasonable staff capacity, including at least one full-time equivalent employee in place at the time this application is submitted, necessary to oversee the operation of the campus(s).

I, the undersigned, hereby certify that the district has authorized me to provide these assurances as noted by my initials on this and all previous pages.

F. Mike Miles

Printed Name of District Superintendent

JMM

Signature of District Superintendent

03-26-2026

Date

Ric Campo

Printed Name of President (Board of Trustees)

RC

Signature of President (Board of Trustees)

03-26-2026

Date

Section 1 - School Overview

This section is not rated separately by the evaluators. It provides the evaluators with a reference for each of the other sections of the proposal, which will be assessed, in part, for the quality of alignment with the School Overview. Please reference page limit requirements on page 5 (Specifications).

Executive Summary

(Limit: 4 Pages)

The Executive Summary should provide a concise overview of the proposed plan for the school; the outcomes you expect to achieve; the geographic and population considerations of the school environment; the challenges particular to those considerations; and the applicant team's capacity to successfully open and operate a high-quality school given the above considerations.

Energy Institute High School—proposed to be governed by the Friends of Energy board—presents a proven, mission-aligned model that makes it an ideal candidate for an 1882 Texas Partnership. As the nation's first energy-themed high school, Energy delivers a coherent program that integrates interdisciplinary project-based learning across science, engineering, social studies, and English with PLTW engineering pathways, Global Graduate Skill development, and industry-based certifications for every graduate.

The school's purpose-built facility enables authentic field experiences and robust industry collaboration, while a cohort-based master schedule ensures daily project time, teacher team planning, and high-fidelity implementation. Paired with Friends of Energy's governance capacity in education, finance, legal compliance, and energy-sector expertise (and a leadership team with a track record of A-rated performance, strong CCMR outcomes, and equitable access) this partnership is positioned to deliver sustained academic excellence, operational stability, and workforce-aligned results that meet and exceed 1882 performance expectations.

Mission & Vision

Energy Institute High School (Energy) exists to deliver a rigorous, interdisciplinary project-based learning (PBL) program with an engineering focus that prepares Houston students for college, career, and civic life in the world's energy capital. The school's mission is to *cultivate non-traditional thinkers through fully implemented project-based learning in STEM*, and its vision is to *equip students with dynamic problem-solving skills so they can innovate and change the world through a project-based approach—one project at a time*

Energy's academic model merges science, engineering, social studies, and English around real-world challenges and Global Graduate Skills (GGS)—leadership, communication, responsible-decision making, adaptability and productivity, critical thinking, and college readiness—deliberately taught and assessed across grades 9–12. All students pursue the Engineering Science CTE Program of Study with the goal of earning the STEM endorsement while meeting college, career, and military readiness (CCMR) and industry-based certification (IBC) expectations.

The Educational Program

Instructional Methods: Energy implements whole-school, teacher-team–designed interdisciplinary PBL aligned to TEKS. Project cycles include authentic launches, driving questions, field experiences, extended inquiry, labs, prototyping, scholarly writing, and public products evaluated by industry and community audiences. PLTW engineering coursework provides a vertically aligned technical pathway; PBL Skills courses embed GGS explicitly each year. A cohort-based master schedule guarantees daily project time and common planning for teacher teams.

Assessment Strategies: Performance tasks, design challenges, prototypes, research products, and exhibitions are scored with content and GGS rubrics; teachers use frequent formative checks and interim assessments (e.g., STAAR interims, NWEA MAP, AP practice) to adjust instruction. A total-points grading system recognizes multiple demonstrations of mastery over 6–9-week projects.

Non-Negotiables: Interdisciplinary PBL across grades; intentional GGS development; universal participation in PLTW Engineering; at least one IBC for every graduate (currently Fusion 360); authentic field experiences; public presentations of learning; protected individual and interdisciplinary cohort planning periods; and a grade-level cohort master schedule that preserves daily project time.

Expected Outcomes

Energy’s model is designed to sustain A-rated performance in TEA domains while expanding college readiness and STEM pathway completion. Annual goals include rubric-aligned project quality, CCMR gains (e.g., SAT/ACT/TSIA/TCB readiness), increased IBC attainment and CTE program completion, EB proficiency growth on TELPAS, and EOC improvement targets (English I/II, Algebra I). Outcomes are monitored via campus data cycles, PLC protocols, and mid-year reviews that trigger growth plans when indicators trend off-track.

Energy’s track record includes multi-year A ratings, AP access and achievement recognized by the College Board Platinum designation, and a sustained culture of authentic exhibitions and industry engagement—evidence that the PBL + PLTW model yields strong academic and workforce-aligned results for a diverse student body.

Geographic & Population Considerations

Energy remains at 3501 Southmore Blvd., proximate to the Ion District, downtown Houston, and three major universities. This location affords students access to corporate partners, research institutions, and higher-ed resources that deepen the authenticity of projects and expand mentoring, field experiences, and capstone support. The purpose-built 2017 facility was designed for PBL and engineering—from flexible labs and maker spaces to learning-optimized hallways—enabling the program’s daily requirements.

Student recruitment continues through HISD School Choice to reflect Houston’s demographics and expand equitable access to advanced STEM opportunities. Historically, Energy has mirrored city diversity, served Title I students, and maintained inclusive practices for special populations, including EB and students with disabilities, within rigorous PBL. The cohort structure (≈100–110 students per cohort in grades 9–11) and a building capacity of ~800 ensure a right-sized environment for interdisciplinary team teaching, exhibitions, and daily project blocks.

Key Challenges & Responses

- **Student wellness and belonging.** Post-pandemic needs elevated demand for mental-health services. Through industry support, Energy engaged a part-time Mental Health Counselor and launched the *Make It Work* club; sustaining this service requires approximately \$40,000 annually.
- **Cohort-based student advocacy.** The Dean of Students model provides four-year relational advising, restorative supports, enrichment guidance, and comprehensive college advising—supporting a nine-year record of 100% graduation for seniors to date; maintaining four deans is essential to the model at ~800 students.
- **Experiential learning logistics.** Interdisciplinary projects require frequent field experiences (≈700 students every six weeks), making transportation one of the largest budget lines.

- **Materials and equipment for engineering and design.** The merged cohort model depends on sustained investment in consumables and tools (e.g., filament for 50+ 3D printers, laser cutters, power tools) and presentation technology for ~800 students.
 - **Calendar and grading coherence.** A nine-week grading cycle aligns with launch-to-exhibition timelines and the total-points system, ensuring sufficient duration for inquiry, labs, fieldwork, and product refinement.
 - **Onboarding to PBL culture.** A multi-day experience that orients new learners to Energy Institute, design thinking, and the dispositions essential for success in a PBL environment..
 - **Teacher capacity building.** In-house PBL 101, PLTW training, and targeted participation in PBL World and ed-tech/innovative curriculum conferences elevate project quality and classroom practice, directly supporting student outcomes.
 - **Curriculum design and leadership.** Teacher-created interdisciplinary projects require curriculum-design stipends and cohort-lead stipends to sustain quality, alignment, and teacher retention.
-

Enrollment & Growth Plan

Energy launched in 2013–2014 with 200 ninth-graders, added one grade annually, and reached 756 students by 2019–2020. COVID-era recruitment constraints produced two smaller cohorts that delayed optimal enrollment; the school served 705 students in 2025–2026 with the final smaller cohort graduating in spring 2026. The plan returns to a stable, ~800-student enrollment aligned to facility capacity and the cohort-based master schedule, preserving staffing ratios and daily project time. The application’s table outlines a phased pathway to 800–810 at capacity while safeguarding PBL fidelity.

Leadership, Governance, and Capacity

School Leadership: Energy’s Instructional Leadership Team combines deep experience in PBL design, assessment, student culture, and operations. Roles include the Principal, Dean of Instruction, Assistant Principals/Deans, Dean of Students, Campus Testing Coordinator, and Special Populations Lead. Together, they manage teacher coaching, STAAR/PSAT/SAT and CCMR systems, LPAC and special education compliance, master scheduling, and campus safety—ensuring coherence between instruction and operations.

Executive Leadership & Board: The Executive Director is evaluated by the governing board and, in turn, evaluates the Principal using T-PESS with measurable expectations that evolve from launch to sustainability. The Friends of Energy board brings expertise in finance/audit (CPA), legal/compliance (J.D.), STEM/engineering and energy operations (P.E., Ph.D.), strategic finance (MBA), and alumni industry voice, providing independent oversight, fiduciary stewardship, and industry alignment. The board meets at least eight times annually, with committees for finance, evaluation, and fundraising/community partnerships.

Performance Management. Energy operates a transparent, data-driven improvement cycle: interim assessments and rubric-aligned project reviews feed PLC actions; mid-year evaluations initiate growth plans when off-track; and end-of-year board reviews determine next-year targets and, if needed, leadership adjustments. Staff support and accountability are anchored in T-TESS and T-PESS, with formal growth plans and, when necessary, file review and personnel actions to ensure students’ interests remain paramount.

Operations & Finance. The facility at 3501 Southmore Blvd. is purpose-built for PBL, eliminating start-up facility risk. The financial plan aligns resources to cohort staffing, field experiences, materials/technology for engineering and exhibitions, student wellness, and teacher professional learning. Systems for budgeting, accounting, purchasing, payroll, internal controls, and audits follow established district and state requirements, with transparent reporting to stakeholders.

Conclusion

Energy Institute High School proposes a proven, coherent model—interdisciplinary PBL + PLTW engineering + GGS—implemented by an experienced leadership team and guided by a governance board with the educational, financial, legal, and industry expertise to sustain excellence. Situated near Houston’s innovation corridor and anchored by a facility designed for project-based STEM learning, Energy will continue to deliver high academic performance, robust CCMR results, industry-recognized credentials, and authentic learning connected to the region’s economic future—while expanding equitable access for students across Houston.

1. Mission and Vision. State the mission and vision of the proposed school. The mission is a statement of the fundamental purpose of the school, describing why it exists. The vision statement describes how the school will operate and what success looks like for students. The mission and vision statement provide the foundation for the entire proposal, and taken together, should identify the students and community to be served and illustrate what success for students will look like.

The mission of Energy Institute High School is to provide an innovative project based learning model for a STEM focused program to support students interested in careers in the energy industry. Energy Institute’s official mission statement is: Energy will cultivate a non-traditional thinker while fully implementing project-based learning in STEM. Energy Institute’s official vision is: Energy will equip students with dynamic problem-solving skills so they can innovate and change the world through a project-based approach, one project and one world view at a time.

2. Educational Need and Anticipated Student Population. Describe the anticipated student population, students anticipated educational needs, and non-academic challenges the school is likely to encounter. Describe the rationale for selecting the location and targeting this student population.

Educational Need

Houston is the energy capital of the world, and thus a perfect place for a school with a focus on energy themes and content. While ensuring that its students have a strong academic foundation and are prepared for success in college and career, Energy Institute also is able to offer students a high-quality, engaging specialized curriculum focused on energy themes and built around project-based learning that prepares them for dynamic futures and helps ensure that Houston will remain at the forefront of the energy industry.

Energy Theme

The modern world is constantly changing, and the school’s dynamic energy theme allows students to have the STEM expertise that will make them workforce-ready even in a future where AI and other new technologies are changing what work looks like every day. A constant amid this rapidly shifting world is a need for energy solutions, and a high school with an energy theme supports updated workforce and postsecondary readiness by providing students with experiences that mirror real-world energy industry needs.

The school’s energy curriculum exposes students to a wide variety of careers, including technical, engineering, and business roles, while addressing the latest trends and technologies in both renewable and traditional energy sectors. Through Energy’s innovative work, the school has built and sustained partnerships with local energy companies, facilitating internships, mentorships, field experiences, and networking opportunities which give students invaluable industry connections and develops global graduate skills. Students learn problem-solving directly applicable to high-growth, high-paying jobs. Additionally, students can earn industry-recognized credentials before graduation, like Fusion 360 and Solidworks, giving them a competitive advantage whether they enter the workforce or pursue higher education.

Project-based learning

Project-based learning (PBL) is the core academic model of Energy Institute High School. PBL shifts students from passive observers to active participants in their learning, as they directly engage with complex, real-world problems rather than just memorizing facts. This hands-on approach promotes deeper knowledge retention because students apply information in practical, meaningful contexts, fostering a more robust understanding of concepts. It develops crucial global graduate skills like critical thinking, collaboration, and creativity, which are necessary for solving complex issues. By giving students some

autonomy and choice in their energy-themed projects, this method increases intrinsic motivation and makes learning more personally relevant and engaging. Energy Institute's instructional processes culminate in a public product – a prototype or presentation – which builds a sense of ownership and accomplishment.

Student Population

In the Past

Beginning with a freshman class in the 2013/2014 school year, Energy's program originally grew one grade level at a time. The school now serves grades 9-12 and has graduated nine senior classes of students as of Spring 2025. Since the program's inception in Fall of 2013, our student population has closely resembled that of Houston's city demographics. As of the 2025-2026 school year, Energy's student population is 42% Hispanic, 23% Black, 27% white, 5% Asian and 3 % multi-race students. Energy is a Title One school with over 50% of our students qualifying for free or reduced lunch and 30% of our student population receives accommodations through special education or a 504 education plan.

Energy is currently a special and unique magnet in Houston ISD, which means that all the students apply to get in and follow the HISD Magnet School Choice lottery system. Currently, to be eligible for a seat at a magnet school, Houston ISD has a matrix score system where student's grades, STAAR scores, and special needs are weighed together to form a comprehensive matrix score. Energy's matrix score minimum is currently set approximately ten points lower than most other magnet schools in Houston to purposefully support reducing the achievement gap among students who might benefit from Energy's innovative learning model.

Going Forward

Our intent is to continue recruiting students from across Houston through HISD's School Choice process. Our recruitment plan includes middle school visits, community events, and campus STEM experiences for middle school students.

Non-Academic Challenges

Over the past thirteen years, Energy Institute High School has seen non-academic challenges increase significantly, reflecting the evolving needs of students and the complex context in which schools now operate.

Mental Health Supports

Post-COVID, the most urgent need was increased access to mental-health services, as many students returned struggling with anxiety, depression, social isolation, and difficulty reconnecting with peers. When budget cuts eliminated the ability to hire a counselor, an industry donor enabled the school to bring on a part-time Mental Health Counselor who provided essential one-on-one support and created the "Make It Work" mental-wellness club. This club now offers weekly opportunities for students to connect, share experiences, and learn coping strategies.

Dean of Students Model

From the school's inception, Energy adopted a Dean of Students model rather than a traditional assistant principal model to ensure every student has a consistent advocate throughout their four years. Deans monitor academic progress, build relationships with students and families, support discipline through restorative and problem-solving approaches, and guide students through clubs, enrichment programs, résumé building, and the full college application process. This model has supported 100% graduation for every senior class over the nine years of graduates. For a school of around 800, maintaining this model requires four full-time deans, whose salaries exceed those of typical school counselors.

Transportation for Field Experiences

Energy's interdisciplinary, project-based approach requires every cohort to participate in field experiences tied to each project's driving question. As a result, approximately 700 students participate in field experiences every six weeks, far more than a traditional high school. The scale of transportation makes bus services one of the school's largest budget items.

Materials, Equipment, and Technology for PBL

Energy's merged cohort model requires ongoing investment in materials and equipment that standard school budgets do not typically cover. Students design and prototype using 3D printers, laser cutters, and power tools, consuming substantial materials. For example, filament costs for 50+ 3D printers over the course of a year exceed typical instructional-materials allocations. In addition, 800 students rely daily on laptops, poster materials, smart projectors, and technology needed for professional exhibitions and presentations.

Nine-Week Grading Period Structure

To fully support interdisciplinary, content-merged projects, Energy requires a nine-week academic calendar rather than a traditional six-week cycle. The extended period allows time for project launches, team formation, co-teaching, labs, field experiences, research, and product development. It also aligns with the school's total-points grading system, which requires time for students to demonstrate learning across multiple modalities.

9th Grade Onboarding

A unique non-academic need is the 9th Grade Bridge Camp, a three-day, two-night program that prepares incoming students for Energy's PBL model and Global Graduate Skills. The camp builds collaboration, communication, and problem-solving skills while connecting students socially before school begins.

Professional Development for PBL

Ongoing professional learning is essential for teachers who design and facilitate high-quality interdisciplinary projects. While Energy provides in-house PBL 101 to support foundational skills, additional external learning experiences deepen teacher expertise and expand instructional innovation. Participation in the PBL World Conference strengthens teachers' ability to design rigorous, authentic projects aligned to real-world problem-solving. Project Lead The Way (PLTW) training enhances teachers' capacity to deliver industry-aligned STEM and engineering pathways with fidelity. Conferences focused on educational technology and innovative curriculum design expose teachers to emerging tools, instructional strategies, and best practices that enrich student engagement and expand the possibilities for inquiry-based learning. Together, these professional development opportunities elevate instructional practice, strengthen project quality, and directly support improved academic outcomes for students.

Teacher Stipends for Curriculum and Leadership Work

Energy teachers design interdisciplinary projects from the ground up, including TEKS mapping, developing driving questions, planning builds and presentations, writing content-specific lessons, and designing assessments. This is significantly more work than traditional lesson planning and requires curriculum-design stipends. Additionally, the school's teacher-leader model includes stipends for cohort leads, who act as project managers by running professional meetings, ensuring instructional alignment, and maintaining project quality. These roles support teacher retention and strengthen the school's instructional systems.

Location Selected in 2015

Energy Institute High School will remain at its current campus at 3501 Southmore Blvd, a location that offers exceptional proximity to Houston's innovation and higher-education corridors. The school sits near the Ion District, downtown Houston, and three major universities, providing unparalleled access to corporate partners, research institutions, and academic resources that strengthen the school's STEM and project-based learning model.

Completed in 2017, Energy's purpose-built facility was designed specifically for interdisciplinary, project-based instruction and energy-themed STEM programs. Every aspect of the building—from flexible engineering labs to collaborative maker spaces and even the hallways—was intentionally created to function as an active learning environment. This innovative campus design continues to support the school's mission of preparing students for the industries and technologies shaping Houston's future.

3. Education Plan / Academic Model. Provide an overview of the education program of the proposed school, including major instructional methods, assessment strategies, and non-negotiables of the school model. Describe the evidence that demonstrates the school model will be successful in improving academic achievement for the targeted student population.

Education Plan/Academic Model

Energy Institute High School's educational program is built on an interdisciplinary project-based learning (PBL) model that merges science, engineering, social studies, and English learning standards into cohesive, real-world projects. This instructional approach is designed to ensure students master rigorous academic content while developing the Global Graduate Skills (GGS)—collaboration, communication, critical thinking, creativity, and personal responsibility—that are essential for

postsecondary success. Every major unit of study includes intentional development of these skills, and teachers design learning experiences so students apply them in authentic contexts.

Interdisciplinary Project-Based Learning

PBL serves as the primary vehicle for instruction across core content areas. Teams of teachers collaboratively design interdisciplinary projects aligned to TEKS, creating entry events (“launches”), driving questions, field experiences, and real-world product outcomes. Students engage in extended inquiry cycles that include research, hands-on experimentation, prototyping, writing, and presentations to authentic audiences. Engineering and science labs, humanities workshops, and integrated team-taught lessons occur within each merged project cycle. This structure allows students to see the connections among disciplines and understand how academic knowledge is applied to industry and community challenges.

PLTW Engineering and the Engineering Science Program of Study

Alongside interdisciplinary coursework, all students progress through the Engineering Science CTE Program of Study, anchored by Project Lead The Way (PLTW) engineering curriculum. PLTW provides a nationally recognized, industry-vetted sequence of engineering courses that emphasize authentic problem-solving, design thinking, and technical skill development. Coursework is continuously updated in partnership with higher education, corporate leaders, and nonprofits, ensuring alignment to emerging workforce needs.

Students begin their high school experience with foundational engineering and manufacturing coursework, where they learn CAD modeling, 3D design, and CNC programming. By the end of 9th grade, students have designed, iterated, and produced original prototypes using advanced manufacturing tools. They continue to refine these skills throughout grades 10–11 in specialized PLTW courses, culminating in the Engineering Design and Development capstone, where students address an open-ended engineering challenge.

Global Graduate Skill Development

From its inception thirteen years ago, Energy Institute High School recognized that while rigorous project-based learning strengthens students’ academic mastery, it also requires intentional development of the skills needed to collaborate, communicate, think critically, and navigate complex real-world challenges. To meet this need, Energy defined a set of six Global Graduate Skills (GGS) that serve as the foundation for students’ “soft skill” development across all four years of high school.

Energy designed a comprehensive GGS curriculum aligned to these skills, creating PBL Skills Courses for grades 9–12 that explicitly teach, model, and assess the behaviors and competencies students need to be successful in interdisciplinary project work. These courses introduce skill expectations, build capacity through structured practice, and allow students to reflect on their growth throughout the year. Within each interdisciplinary project, teachers incorporate GGS-aligned lessons, team-building protocols, reflection routines, and rubrics that guide student development in areas such as collaboration, communication, creativity, problem-solving, and professional responsibility.

This intentional, vertically aligned approach ensures that students not only master academic content but also graduate prepared to thrive in college, careers, and the rapidly changing workforce.

Industry-Based Certification Pathways

A central non-negotiable of the Energy model is that students graduate with at least one industry-based certification (IBC). Currently, all students work towards the Fusion 360 Certification, validating their advanced technical skills in CAD and digital design. Students begin preparing for this credential as freshmen and build skills progressively through coursework and PBL experiences, ensuring high levels of readiness by the time they complete the certification exam in grade 12. This approach positions students competitively for engineering pathways in college and career.

Assessment Strategies

Energy uses a comprehensive assessment system aligned to interdisciplinary instruction and PBL. Assessment strategies include:

- Performance assessments such as design challenges, prototypes, presentations, research products, and exhibitions.

- Formative assessments embedded throughout the project cycle, including checkpoints, drafts, critiques, and data reflections.
- Summative assessments aligned to TEKS, evaluated using content rubrics and GGS rubrics for skills such as collaboration, communication, and critical thinking.
- Industry-aligned assessments in PLTW courses and IBC preparation.
- A total points grading system, which allows students to demonstrate mastery in multiple modalities and supports the extended timelines of merged projects.

Projects conclude with authentic presentations to industry partners, community members, or university collaborators, providing real-world accountability and feedback.

Non-Negotiables of the School Model

Energy's educational model is anchored by several non-negotiables that ensure consistency, fidelity, and high-quality implementation:

- Interdisciplinary, team-designed PBL as the core instructional method across all grade levels.
- Intentional Global Graduate Skill development embedded into every project cycle.
- Full participation in the PLTW Engineering sequence and the Engineering Science Program of Study for all students.
- Completion of at least one industry-based certification, with Fusion 360 as the current credential for all seniors.
- Field experiences connected to each project's driving question, ensuring authentic application of content and skills.
- Regular presentations of learning to external audiences, including industry and community partners.
- Collaborative teacher planning, supported by dedicated time for TEKS alignment, rubric development, and project refinement.
- Structured individual and interdisciplinary cohort planning periods that provide teachers with the time needed to design high-quality projects and coordinate instruction across content areas.
- A master schedule organized around grade-level cohorts, ensuring consistent daily project time and supporting the integrated PBL model.

Evidence of Academic Success

- **Improved Test Performance:** Studies show PBL students often perform as well as or better than peers in traditional settings on standardized tests, especially when projects align with standards.
- **Deeper Knowledge Retention:** By actively applying concepts, students retain information longer and gain a more comprehensive understanding.
- **Enhanced Higher-Order Thinking:** PBL cultivates critical thinking, problem-solving, and analysis as students tackle complex questions, not just memorize facts.

Why PBL Works

- **Relevance & Motivation:** Connecting learning to real-world problems makes education more meaningful, increasing student engagement and enthusiasm.
- **Skill Development:** Projects build essential skills like collaboration, communication (oral & written), and self-efficacy (agency), which are crucial for college and careers.
- **Active Learning:** Students move from passive recipients to active investigators, exploring interests and applying knowledge to create tangible products.
- **Authentic Assessment:** Well-designed PBL includes diverse deliverables, allowing students to demonstrate mastery in multiple ways, preparing them for varied academic and professional demands.

4. Leadership and Governance. List the current members of the school's proposed leadership team and governing board, including their roles with the school and their current professional affiliations.

Add lines to the following table, as needed. Do not list members of the applicant team who will not have an official leadership role with the school going forward, such as consultants.

Full Name	Current Job Title and Employer	Position with Proposed School
Lori Lambropoulos	Principal of Energy Institute Houston ISD	Executive Director Friends of Energy
Elizabeth Harris	Dean of Instruction at Energy Institute Houston ISD	Principal Energy Institute
Noelle MacGregor	Dean at Energy Institute Houston ISD	Dean Energy Institute
Lauren Garcia	Dean at Energy Institute Houston ISD	Dean Energy Institute
Nicholas Champion	Dean at Energy Institute Houston ISD	Dean Energy Institute
Eli TwoSisters	Special Education Chair Houston ISD	Special Education Chair Energy Institute
Stephanie Collins	Testing Coordinator at Energy Institute Houston ISD	Testing Coordinator Energy Institute
Julie Zachary	Global Learning Leader GHD Engineering, Architecture & Construction Services	Governing Board Member Friends of Energy
Rhett Davis	Aeroderivative Gas Turbine Leader Wattbridge, ProEnergy Services	Governing Board Member Friends of Energy
Brock Lewis	Facilities Engineer & Project Manager Occidental Petroleum	Governing Board Member Friends of Energy
Rod Shampine	Critical Minerals Tech Advisor, Mechanical Architect, Direct Lithium Extraction Pilot Plant and Critical Minerals Group	Governing Board Member Friends of Energy
Lucie Tredennick	J.D., CCEP	Governing Board Member Friends of Energy
Kathy KahaneK	Partner KahaneK, Franke and Associates, L.C	Governing Board Member Friends of Energy
Aline Pham	Senior Accountant NRG Energy	Governing Board Member Friends of Energy

Enrollment Summary

(Limit: 2 Pages)

1. Complete the table below, illustrating the growth plan for the school. Indicate the school year (e.g., for Year 1, change 20xx to 2024) for each column.

Note: Remove any rows for grades the school will not serve.

Grade Level	Number of Students					
	Year 1 2027	Year 2 2028	Year 3 2029	Year 4 2030	Year 5 2031	At Capacity 2031
9	210	210	210	210	210	210
10	185	200	200	210	210	210
11	190	180	190	195	200	200
12	168	185	175	185	190	190
TOTAL	753	775	775	800	810	810

2. Briefly describe the rationale for the number of students and grade levels served in Year 1 and the basis for the growth plan as outlined in the table.

Energy Institute High School opened in the 2013–2014 school year with a design intentionally aligned to Houston ISD’s “small school” magnet model, serving an inaugural class of 200 ninth-grade students. This enrollment target aligned with the district’s vision for a specialized, high-innovation magnet program and was met in the school’s first year. The school added one grade level each subsequent year, growing steadily until reaching 756 students in grades 9–12 by the 2019–2020 school year. When the new Energy building opened in spring 2018 and staff moved in for the 2018–2019 school year, the facility was built to accommodate up to 800 students, aligning long-term enrollment goals with available space and program needs.

The COVID-19 years (2020–2022) temporarily impacted recruitment, resulting in two smaller ninth-grade cohorts of approximately 150 students each. These smaller classes progressed through the school and delayed the return to

optimal enrollment. By the 2025–2026 school year, the school served 705 students, and the final smaller COVID-era cohort graduated in spring 2026, allowing the school to reestablish its long-term enrollment trajectory.

The target enrollment of approximately 800 students is grounded in the instructional design of Energy’s interdisciplinary PBL cohort model. In grades 9–11, students are organized into cohorts of roughly 100–110 students, each supported by a four-teacher interdisciplinary team in English, science, social studies, and engineering. These teacher teams collaboratively design 6- to 9-week merged projects aligned to TEKS, ensuring that students experience fully immersive, interdisciplinary project-based learning. Maintaining the cohort size and structure is essential for sustaining team-designed projects, coordinated field experiences, and daily project work embedded in the master schedule.

The growth plan outlined in the enrollment table reflects a return to this optimal structure. It ensures that as each grade level expands, the cohort-based instructional model, staffing ratios, and PBL design cycles remain intact. This steady, capacity-aligned approach enables the school to preserve program quality while returning to its intended full enrollment of 800 students.

Section 2 – Educational Program

A strong Educational Program is coherent and aligned with the school’s mission and vision, Operations Plan, and Financial Plan.

Curriculum and Instructional Design

1. **Provide the following:**
- a. **A curriculum aligned to state standards that includes a scope and sequence for each grade level and/or content area to be used at the school(s):**

Energy Institute High School delivers a rigorous, innovative curriculum fully aligned to the Texas Essential Knowledge and Skills (TEKS), Pre- AP, and Advanced Placement (AP) standards. Our instructional model is grounded in high-quality Project-Based Learning (PBL), ensuring students master state standards while engaging in authentic, interdisciplinary projects that reflect real-world applications in energy, engineering, and technology fields.

Curriculum Design and Alignment

- This application describes the school’s current curriculum. We intend to use these curricular materials or similar materials narrowly tailored to meet ambitious outcome goals for our students.
- All courses follow a TEKS-based scope and sequence, ensuring that readiness and supporting standards are addressed systematically throughout the year.
- Teachers collaboratively map TEKS across disciplines during summer planning sessions to create integrated projects that reinforce multiple content standards. Standards are documented in the EIHS Project Planning Guide (PPG).
- AP and Pre-AP courses adhere to College Board frameworks, with vertical alignment to prepare students for success in advanced coursework.
- Energy’s engineering courses follow the PLTW Scope and Sequence for the following courses:

Course	Aligned PLTW Scope and Sequence
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Engineering Design and Problem Solving	Introduction to Engineering Design
Engineering Science	Principles of Engineering
Environmental Engineering	Environmental Sustainability
Engineering Design and Presentation	PLTW Capstone

- Energy students also take a PBL Skills Course aligned to six defined Global Graduate Skills. Energy used these skills to write course standards for each PBL Skills Course students would in grades 9 through 12.
- [Energy's 6 Global Graduate Skill Competencies](#)
- [Energy Global Graduate Skills Rubric 1](#)
- [Energy Global Graduate Skills Rubric 2](#)
- [Energy 9th Grade PBL Skills Course Standards](#)
- [Energy 10th Grade PBL Skills Course Standards](#)
- [Energy 11th Grade PBL Skills Course Standards](#)
- [Energy 12th Grade PBL Skills Course Standards](#)

Instructional Model

- Project-Based Learning: Students learn core content through authentic projects that require critical thinking, collaboration, and problem-solving. Each project is designed to meet TEKS objectives aligned to Global Graduate competencies. Projects include formative checkpoints to monitor mastery.
- Direct Instruction and Workshop Model: Teachers provide focused, standards-based instruction to introduce key concepts, followed by guided practice and application within projects.
- Differentiation: Instruction is tailored to meet diverse learner needs, including scaffolds for special populations and enrichment opportunities for advanced learners.

Scope and Sequence

- Each content area has a detailed scope and sequence aligned to TEKS and AP standards, broken down by grading period as outlined in Project Planning Guides and daily agenda slides. Teachers use these documents to ensure pacing and coverage of all required standards.
- Interdisciplinary planning ensures that projects integrate multiple TEKS strands, reinforcing learning across subjects while maintaining fidelity to individual course requirements.

Curricular Resources

- Our school currently uses the following curriculum and intends to use these materials or similar, standards-aligned offerings:
 - ELA: Savvas myPerspectives, digital platforms such as Newsela.
 - Math: Carnegie Learning Texas Math Solutions and Zearn for online practice.
 - Science and Engineering: Savvas Science, Cengage Learning, PLTW
 - Social Studies: TEKS-based curriculum enhanced with primary sources and digital tools/resources such as Gilder Lehrman.
 - Teachers also leverage industry partnerships to incorporate authentic data sets, case studies, and emerging technologies into projects, ensuring relevance and rigor.

Assessment and Monitoring

- Student mastery of TEKS is assessed through formative checks, project rubrics, and summative assessments aligned to state standards.
- Teachers analyze student progress during cohort planning periods, adjusting instruction and project design as needed.
- Semester benchmark assessments and AP practice exams provide additional data to monitor growth and readiness.

- Interim STAAR assessments will ensure teachers identify academic gaps and students in need of targeted interventions.

b. A plan for selecting and implementing High Quality Instructional Materials, including what materials will be used at the campus(es):

Energy Institute High School will ensure that all instructional materials selected and implemented meet the definition of High-Quality Instructional Materials (HQIM) as outlined in TEC §31.002(1) and are fully aligned to the Texas Essential Knowledge and Skills (TEKS) and Advanced Placement (AP) standards. The campus leadership team, drawing on expertise from professionals such as HISD curriculum specialists, will oversee the selection process to guarantee rigor, relevance, and alignment with our instructional model of high-quality Project-Based Learning (PBL).

Selection Process

- Materials will be chosen based on:
 - Alignment to TEKS and AP standards.
 - Support for authentic, interdisciplinary project design.
 - Accessibility for diverse learners, including English learners and students receiving special education services.
- The campus will prioritize resources vetted by the Texas Education Agency and recognized as HQIM.

c. A plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials:

Energy Institute High School is committed to providing continuous, high-quality professional development that equips all instructional staff to implement rigorous, objective-driven curriculum and instructional materials aligned with our mission of delivering authentic Project-Based Learning (PBL) experiences. Our professional development model emphasizes collaboration, interdisciplinary planning, and responsiveness to campus needs, ensuring teachers are prepared to meet the demands of TEKS, AP coursework, and diverse student populations.

Professional Development Approach

- **Foundational Training:** All new teachers participate in **Energy's 3-Day PBL 101** during onboarding. This intensive training introduces the principles of high-quality PBL, including designing authentic projects, aligning objectives to TEKS, and assessing student learning through performance-based measures.
- **Summer Cohort Planning:** Each summer, instructional teams engage in a **3-day interdisciplinary planning session** focused on cross-curricular TEKS mapping and AP curricular updates. This collaborative approach ensures alignment across content areas and supports integrated project design.
- **Preservice Professional Development:** Prior to the start of school, all teachers attend preservice sessions aligned to the **Campus Action Plan**, high-quality PBL practices, and strategies for supporting special populations.
- **Ongoing Support:** Throughout the school year, teachers receive targeted professional development during scheduled campus PD days, weekly Spark meetings, and coaching cycles. These sessions address emerging needs, instructional strategies, and continuous improvement goals.
- **Industry Partnerships:** To increase the authenticity and relevance of PBL experiences, Energy Institute collaborates with industry partners to provide teachers with exposure to real-world practices and emerging technologies. These partnerships inform project design, offer guest-led PD sessions, and create opportunities for teachers to integrate industry standards into classroom instruction.

Professional Development Calendar

- **Summer (June–July):**
 - 3-Day PBL 101 for new teachers
 - 3-Day interdisciplinary planning for cohort teams

- **August (Preservice):**
 - Campus-wide PD aligned to CIP, PBL best practices, and special population supports
- **School Year:**
 - Monthly PLCs focused on project design, formative assessment, and instructional strategies
 - Quarterly campus PD days for deep dives into curriculum alignment and student engagement
 - Ongoing coaching and feedback cycles led by instructional leadership team
 - Industry-led PD sessions integrated throughout the year to strengthen real-world connections

Accountability and Impact

Professional development is directly tied to teacher evaluation and instructional quality. Administrators conduct regular observations and provide feedback aligned to PBL planning and implementation and campus priorities. Teachers are expected to apply strategies learned during PD sessions in their classrooms, and evidence of implementation is monitored through project showcases, student work artifacts, and instructional walkthroughs.

d. A framework for instructional design and strategies that:

- **reflect the needs of the school's target population**
- **ensure all students meet or exceed the expectations of Texas state standards**
- **promote critical-thinking skills**

Energy Institute High School's instructional framework is designed to meet the needs of our diverse student population while ensuring mastery of Texas Essential Knowledge and Skills (TEKS) and Advanced Placement standards. Our approach emphasizes high-quality Project-Based Learning (PBL) as the primary vehicle for instruction, promoting critical thinking, collaboration, and problem-solving skills essential for success in college, career, and the global workforce.

Core Principles

- **First, Good Instruction:** All students, including English learners and students receiving special education services, receive grade-level instruction first, supported by scaffolds and accommodations as needed. Teachers employ strategies such as visuals, graphic organizers, sentence stems, and manipulatives to ensure access to rigorous content.
- **High Expectations:** Instruction is grounded in the belief that all students can achieve at high levels. Teachers design lessons and projects that challenge students to think critically and apply knowledge in authentic contexts.

Instructional Design Model

- **Interdisciplinary Project-Based Learning:** Each grading period includes major projects that synthesize learning objectives from science, engineering, social studies, and English. Projects are anchored by teacher-created driving questions that contextualize inquiry within real-world problems or issues.
- **Global Graduate Skills (GGS):** Projects intentionally embed skills such as critical thinking, communication, collaboration, and adaptability. Students engage in structured critique and revision protocols to refine their work and deepen learning.
- **PBL Skills Course:** In addition to core content, students participate in a dedicated PBL Skills course that focuses on developing competencies such as research, presentation, and problem-solving, ensuring readiness for complex, authentic tasks. This course also incorporates critique and refinement protocols, a key component of the engineering design process.

Instructional Strategies

- **Scaffolding and Differentiation:** Teachers provide layered supports while maintaining grade-level rigor, including chunked instruction, modeling, and guided practice.
- **Formative Assessment:** Frequent checks for understanding, including project milestones and demonstrations of learning, inform instructional adjustments.
- **Critical Thinking Emphasis:** Lessons and projects require students to analyze, evaluate, and create, moving beyond rote memorization to higher-order thinking aligned with Bloom's Taxonomy.

Technology Integration

Technology is embedded throughout the instructional framework to enhance engagement, collaboration, and real-world application:

- Digital Tools: Platforms such as Microsoft Teams, OneNote, and Google Workspace support collaboration and project management.
- Simulations and Modeling Software: Students use engineering and energy-related tools (e.g., CAD software, data visualization platforms) to design and test solutions.
- Data Analysis: Projects incorporate authentic datasets, allowing students to apply statistical and computational thinking.
- Virtual Industry Engagement: Through partnerships, students participate in virtual site visits, webinars, and mentorship sessions with professionals in energy and engineering fields.

Industry Integration

Energy Institute leverages partnerships with energy and engineering sectors to inform project design and provide authentic contexts for learning. These collaborations ensure that instructional strategies reflect real-world applications and prepare students for future careers.

College Readiness and Industry Certifications

Our instructional framework is intentionally aligned to college readiness standards and industry expectations. Students engage in AP coursework and rigorous projects that develop academic and technical skills required for postsecondary success. Additionally, Energy Institute offers pathways for students to earn industry-recognized certifications in areas such as engineering design software and engineering career fundamentals (safety, teamwork, materials science, production, and basic software). These certifications, combined with authentic project experiences, position graduates to excel in both college and career environments.

e. A plan to identify and serve students with learning gaps:

Energy Institute High School is committed to ensuring that all students meet or exceed grade-level expectations by implementing a comprehensive system to identify and address learning gaps. Our approach combines data-driven decision-making, targeted interventions, and ongoing progress monitoring within a Multi-Tiered System of Supports (MTSS) framework.

Identification Process

- Multi-Tiered System of Supports (MTSS): Energy Institute uses MTSS to identify students who exhibit academic or behavioral challenges. This system integrates multiple data sources to provide timely and accurate identification.
- Assessment Data: Teachers and administrators analyze:
 - NWEA MAP Growth or similar assessments in reading and math (administered three times per year).
 - Interim assessments aligned to TEKS and AP standards.
 - Classroom formative assessments, including project milestones and demonstrations of learning.
- Behavioral Indicators: Attendance, engagement, and discipline data are reviewed to identify students who may require additional support.

Support Strategies

- Tiered Interventions: Based on data, students receive targeted supports:
 - Tier 1: High-quality, grade-level instruction with embedded scaffolds and differentiation.
 - Tier 2: Small-group interventions during advisory or enrichment periods.
 - Tier 3: Intensive, individualized support, including tutoring and specialized instructional plans.
- Double-Blocked Algebra I: Students entering high school with math deficits are scheduled into a double-blocked Algebra I course to accelerate mastery of foundational skills.
- Special Populations: English learners, students with disabilities, and 504 students receive tailored accommodations and supports aligned to their individualized plans.

Progress Monitoring

- Teachers track student progress through:
 - Weekly PLC/cohort meetings to review formative assessment data.
 - MTSS documentation for intervention plans and outcomes.
 - NWEA MAP growth targets to measure long-term progress.
- Parents are engaged through regular communication regarding student performance and intervention plans.

f. A plan to maximize instructional time:

Energy's approach emphasizes bell-to-bell instruction, efficient transitions, and engaging activities that maximize student time on task within the context of rigorous, TEKS-aligned Project-Based Learning (PBL).

Core Practices

Bell-to-Bell Instruction: Teachers plan learning objectives (LO) and project deliverables aligned to TEKS. Instruction and activities are planned for the entire period to maintain engagement and rigor. The LO, DOL, and timed classroom activities are documented on digital daily agenda slides accessible via QR code at the entrance of every classroom. Additionally, a master schedule with hyperlinks to daily classroom agendas is created each school year to provide quick access to the day's learning.

Daily Demonstrations of Learning (DOL): Each class includes a DOL that articulates the TEKS-aligned student deliverable within the framework of the current project. These formative checks ensure accountability and guide instructional adjustments.

Active Engagement: Students spend the majority of class time reading, writing, listening, and speaking within the context of authentic projects. Activities are designed to promote critical thinking and collaboration.

Efficient Transitions: Teachers facilitate smooth movement between whole-group instruction, independent work, and collaborative project time. Breakout spaces and materials are prepared in advance to minimize downtime.

Structured Project Work: Teachers use project rubrics and conduct individual and group check-ins to ensure students remain focused and productive during project work time.

Instructional Time Maximization Strategies

- Alignment of all activities to the daily objective and overall project goals.
- Use of timers and pacing guides to maintain academic sense of urgency.
- Integration of instructional strategies and protocols to keep students actively engaged in critical thinking and collaboration.
- Continuous monitoring of student progress during class to provide immediate feedback and support.

Technology Integration

Technology plays a critical role in maximizing instructional time:

- **Digital Project Management Tools:** Tools such as OneNote, PearDeck, Canvas, and the Google Suite allow teachers to organize project timelines, share resources, and monitor student progress efficiently.
- **Timers and Pacing Apps:** Digital timers help teachers maintain pacing and ensure smooth transitions between instructional segments.
- **Collaborative Tools:** Students use shared digital workspaces for real-time collaboration, reducing downtime and increasing productivity.
- **Learning Management Systems (LMS):** Teachers post agenda slides, rubrics, and resources in advance, enabling students to access materials quickly and stay on task.

g. A justification for the proposed educational program based in research, theory, and/or experience, including why it is likely to be effective for the anticipated student population:

Energy Institute High School's interdisciplinary, engineering-focused Project-Based Learning (PBL) model is grounded in a strong research base, a nationally recognized framework for high-quality implementation, and more than a decade of demonstrated success with Houston's diverse student population. In its 13 years as the nation's first energy-themed high school, Energy has consistently shown that real-world, inquiry-driven learning prepares students for college, career, and civic life. The campus holds an A rating in all TEA accountability domains and has earned the College Board Platinum designation for the past two years, underscoring high levels of AP access, participation, and achievement across all student groups.

PBL Supports Academic Outcomes

Rigorous research confirms that high-quality PBL improves academic achievement. In a randomized controlled trial, students enrolled in AP courses taught through the Knowledge in Action PBL model were 8–10 percentage points more likely to earn a score of 3 or higher on AP exams than peers in traditional classrooms (Lucas Education Research, n.d.). These gains were consistent for both low-income and higher-income students, demonstrating PBL's effectiveness for historically underserved populations. Students in PBL settings reported greater engagement and felt better prepared for college-level expectations. The success documented in national PBL studies is directly reflected in Energy's sustained AP achievement as our students consistently outperform district and state averages.

PBL Prepares Students for the World of Work

Research from PBLWorks (n.d.) highlights that high-quality PBL develops essential workforce competencies—problem-solving, collaboration, communication, and creativity. Students who engage in sustained PBL are better equipped to navigate complex professional environments, adapt to new technologies, and work effectively in teams. Energy's projects mirror these expectations by integrating authentic energy-sector challenges, sustainability issues, and engineering design principles, giving students early exposure to STEM-industry norms.

Alignment to the Framework for High-Quality PBL

Energy's instructional program aligns with the six characteristics of High-Quality Project-Based Learning:

- Intellectual Challenge and Accomplishment
- Authenticity
- Public Product
- Collaboration
- Project Management
- Reflection

These characteristics form a research-based foundation for effective PBL implementation (High Quality Project Based Learning, n.d.). They emphasize deep thinking, sustained inquiry, real-world relevance, professional collaboration, and iterative improvement—all of which guide Energy's interdisciplinary project design and student exhibitions.

Energy's Proven Track Record

Energy serves a diverse student body, including large populations of Hispanic, Black, multilingual learners, and students with learning differences. PBL research has shown strong positive outcomes across demographic groups, including students from low-income backgrounds. The Knowledge in Action study specifically demonstrated improved AP outcomes for underrepresented students, and Energy's own results align with these findings.

Key evidence of effectiveness includes:

- 13 years of successful operation as the nation’s first energy-themed high school
- A-rated in TEA Achievement, Progress, and Closing the Gaps
- College Board Platinum Award for two consecutive years
- Robust industry partnerships offering authentic, career-connected learning experiences
- Hundreds of completed engineering projects, many publicly evaluated by industry and civic leaders

Students complete more than 15 interdisciplinary projects over four years, each grounded in meaningful community or global issues. Research consistently shows that authenticity and relevance increase motivation, deepen understanding, and lead to higher-quality academic work (High Quality Project Based Learning, n.d.). Energy’s tradition of public exhibitions and engagement with industry experts directly exemplifies the HQPBL “Public Product” criterion, which strengthens communication skills, craftsmanship, and academic ownership.

References

High Quality Project Based Learning. (n.d.). A framework for high quality project based learning [Guide]. <https://hqpbl.org/>

Lucas Education Research. (n.d.). Project-based learning boosts student achievement in AP courses [Research brief]. <https://lucasedresearch.org/>

PBLWorks. (n.d.). From K–12 to higher ed: Expanding project based learning pathways for career readiness [Research report]. <https://www.pblworks.org/>

High School Graduation Requirements (*High Schools Only*)

2. **Provide the following:**

- a. **As Attachment 1**, exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do and ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce).

Attachment 1 included?

☐ YES ☐ NO

- b. **Systems and procedures the school will implement for students at risk of dropping out or not meeting exit standards:**

Energy Institute High School implements a proactive, data-driven system to ensure all students remain on track to graduate with a Distinguished Level of Achievement diploma, meet College, Career, and Military Readiness (CCMR) metrics, and earn program endorsements. Our approach centers on personalized academic advising, continuous progress monitoring, and targeted interventions.

Dean Model for Academic Advising

- Each student is assigned a Dean of Students who serves as their academic advisor for the entirety of their high school career, providing consistency and strong relationships.
- The Dean collaborates with students and families to develop and maintain a four-year graduation plan, including course scheduling aligned to endorsements and CCMR goals.

Monitoring and Accountability

- **Mid-Cycle and End-of-Cycle Reviews:** Deans monitor academic progress at the midpoint and end of every grading cycle to identify students who are at risk of failing courses or falling behind on graduation requirements.
- **Transcript Audits:** These audits are conducted each semester to ensure students are on track for:
 - Distinguished diploma requirements.
 - CCMR indicators (e.g., AP exams, SAT/ACT benchmarks, certifications).
 - Program endorsements in STEM and energy-related fields.

Targeted Support

- When a student is identified as academically off track, the Dean initiates a Growth Plan that includes:
 - Specific academic goals and timelines.
 - Targeted interventions such as tutoring, credit recovery, or schedule adjustments.
 - Collaboration with teachers and support staff to provide personalized assistance.
- Students with significant gaps may be enrolled in double-blocked core courses (e.g., Algebra I) or be assigned to intervention periods for intensive support.

Family Engagement

- Deans maintain regular communication with families regarding student progress, graduation requirements, and available resources.
- Parent meetings are scheduled for students requiring growth plans to ensure alignment and shared accountability.

Early Warning Indicators

- Attendance, discipline, and engagement data are monitored alongside academic performance to identify students at risk of dropping out.
- Intervention teams meet regularly to review data and adjust supports as needed.

Special Populations and At-Risk Students

3. Provide the following:

- a. An explanation of evidence from which the projection of anticipated special populations was derived:

Energy Institute High School's projections for special populations are based on historical enrollment trends and Texas Education Agency (TEA) data. Over the past five years, the percentage of students receiving special education services has steadily increased, reflecting both demographic shifts and improved identification processes. This trend provides a reliable basis for anticipating future enrollment in special populations.

Historical Data

Year	Enrollment	SPED #	SPED %	504 #	504 %	EB #	EB %	Eco. Dis. #	Eco. Dis. %
25-26	691	86	12.4%	129	18.7%	30	4.3%	363	52.5%
24-25	663	71	10.7%	121	18.3%	39	5.9%	308	46.5%
23-24	663	56	8.4%	101	15.2%	42	6.3%	409	61.7%
22-23	676	44	6.5%	101	14.9%	41	6.1%	426	63%
21-22	696	47	6.7%	96	13.8%	30	4.3%	416	59.8%

This consistent upward trend—from 6.7% in 2021–2022 to 12.4% in 2025–2026—indicates that Energy Institute will continue to serve a growing population of students requiring special education services. Projections also account for district-level demographic data and feeder patterns, which suggest similar increases in English Language Learners and students requiring 504 accommodations.

Commitment to High Expectations

Our instructional model integrates special populations into rigorous, TEKS-aligned Project-Based Learning (PBL) environments with individualized supports. Through a Multi-Tiered System of Supports (MTSS), evidence-based interventions, and meaningful inclusion practices, we ensure that students with disabilities and language barriers receive the tools and opportunities necessary to reach their full potential.

Staffing and Resource Allocation

To meet the needs of our growing special education population, Energy Institute will allocate resources strategically:

Special Education

- Hiring additional certified SPED teachers to maintain low instructional ratios.
- Increasing instructional aide support to strengthen inclusion and small-group interventions.
- A dedicated SPED Department Chair to oversee compliance, instructional quality, and service coordination.

504 and MTSS

- Continued training for general-education teachers on accommodation implementation.
- Expansion of MTSS and campus-based intervention teams to support academic and behavioral needs.

Emergent Bilingual

- Ongoing professional development in sheltered instruction strategies.
- Purposeful integration of linguistic scaffolds—including vocabulary supports, structured speaking opportunities, and visual frameworks—embedded within the PBL model to promote both content mastery and language development..

Economically Disadvantaged

- Strategic use of compensatory education funds to support tutoring, mentoring, extended learning opportunities, and access to instructional materials.

These staffing decisions are informed by enrollment projections and designed to ensure that all students receive high-quality instruction and support within an inclusive, rigorous learning environment.

b. An explanation of the organization’s experience in, understanding of, and capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted:

Energy Institute High School demonstrates a strong track record of compliance and success in serving students with disabilities, emergent bilingual students, and students identified as gifted and talented. Our systems and practices reflect a deep understanding of IDEA, Texas Administrative Code (TAC) Title 19, Chapter 89, and all applicable federal and state requirements. We currently follow Houston ISD’s general education referral and screening system for identification and evaluation, ensuring timely and accurate services for all eligible students.

Special Education

- **Compliance and Staffing:** Energy Institute employs certified special education teachers and instructional aides to provide services outlined in students’ Individualized Education Programs (IEPs). A dedicated SPED Department Chair oversees ARD committee processes, compliance monitoring, and coordination of services.
- **Evidence of Success:** According to the 2024–25 TAPR report:
 - Special Education students achieved 82% Approaches Grade Level or Above in STAAR U.S. History and 81% in Biology, with strong performance in Algebra I and English II.

- CCMR Metrics: 100% of graduates, including those served by special education, met College, Career, and Military Readiness indicators in 2023–24.
- Advanced Diploma Plans: 5.1% of graduates were current SPED students earning advanced diplomas, demonstrating rigorous academic achievement.
- **Capacity:** Our MTSS framework integrates academic and behavioral data to identify needs early and provide tiered interventions. Growth plans and targeted supports ensure students remain on track for graduation.

Emergent Bilingual Students

- **Identification and Services:** Energy Institute adheres to TAC Chapter 89 requirements and currently follows HISD’s bilingual/ESL policies. Students receive language supports through ESL-certified teachers and sheltered instruction strategies embedded in PBL.
- **Evidence of Success:** TAPR data shows:
 - EB students achieved 95% Approaches and 81% Meets Grade Level across all STAAR subjects in 2025, outperforming district averages.
 - CCMR Performance: EB graduates achieved 83% Meets Grade Level in ELA and 68% in Math, with strong growth indicators.
- **Capacity:** Teachers receive ongoing training in language acquisition strategies and culturally responsive practices to ensure equitable access to rigorous curriculum.

Gifted and Talented Students

- **Identification and Programming:** Energy Institute currently follows HISD’s GT identification protocols and provides differentiated instruction through advanced coursework and enrichment opportunities. Nearly 48.4% of students are identified as GT, significantly above district and state averages.
- **Evidence of Success:** GT students consistently demonstrate high achievement:
 - STAAR Masters Level Performance: GT students exceeded 50% Masters in Social Studies and Science.
 - AP/IB Participation: 83.9% of juniors and seniors participated in AP/IB courses, with 65.6% meeting AP/IB criterion scores.
- **Capacity:** Teachers are trained in GT instructional strategies and PBL design that promotes depth, complexity, and critical thinking.

Energy Institute’s leadership team includes experienced administrators and specialists who have successfully implemented compliance systems and high-quality programs for special populations. Our proven results (A-rated campus, multiple distinction designations, and 100% CCMR readiness for graduates) demonstrate capacity to meet and exceed state and federal obligations while maintaining high expectations for all students.

c. A plan for providing services to students with special needs, including how you ensure these students:

- are appropriately identified
- are served in the least-restrictive environment possible
- have appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities in ways that support their development
- receive required and appropriate support services as outlined in their Individualized Education Plans and 504 plans
- participate in standardized testing

Energy Institute High School is committed to ensuring that students with disabilities receive high-quality, individualized support while maintaining access to rigorous academic and extracurricular opportunities. Our plan aligns with IDEA, Texas Administrative Code (TAC) Title 19, Chapter 89, and HISD policies to guarantee compliance and equity.

Identification

- Energy Institute follows Houston ISD's general education referral and screening system to identify students who may require special education or 504 services.
- Full individual and initial evaluations are conducted in accordance with TAC requirements.
- Admission, Review, and Dismissal (ARD) committees make eligibility determinations and develop Individualized Education Programs (IEPs) in collaboration with families.

Least Restrictive Environment (LRE)

- Students are served in the least restrictive environment possible, with inclusion in general education classrooms as the default placement.
- Co-teaching models and push-in support ensure students participate in core instruction alongside peers.

Access to Curriculum and Schoolwide Activities

- All students have access to the general education curriculum, including advanced coursework and interdisciplinary Project-Based Learning (PBL).
- Students with disabilities participate fully in schoolwide educational programs, extracurricular activities, and culture-building events, fostering social-emotional development and belonging.

Support Services

- Services outlined in IEPs and 504 plans are delivered by certified special education teachers, instructional aides, and related service providers.
- A SPED Department Chair oversees compliance, service delivery, and coordination of supports.
- Energy Institute uses the Multi-Tiered System of Supports (MTSS) to provide additional interventions for students who need more intensive academic or behavioral support.

Participation in Standardized Testing

- Students with disabilities participate in all required state assessments, including STAAR and EOC exams, with accommodations as specified in their IEPs or 504 plans.

d. A plan for providing services to emergent bilingual students, including:

- **methods for appropriate identification,**
- **specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the general education curriculum and core academic program for these students,**
- **plans for monitoring and evaluating student progress and success and for exiting them from services,**
- **a plan for including emergent bilingual students in standardized testing and schoolwide educational, extra-curricular, and culture-building activities**

Energy Institute High School is committed to ensuring that emergent bilingual (EB) students achieve English proficiency while maintaining access to rigorous academic content and schoolwide opportunities. Our plan aligns with Texas Administrative Code (TAC) Title 19, Chapter 89, HISD policies, and evidence-based practices.

Identification

- All new students complete the Home Language Survey upon enrollment.
- A Language Proficiency Assessment Committee (LPAC), formed in compliance with TAC §89.1220, reviews assessment data and determines initial placement and instructional supports.
- Students are assessed using state-approved language proficiency assessments to determine English proficiency levels.

Instructional Programs and Strategies

- Content-Based ESL Model: EB students receive instruction in English through core subjects (ELA, math, science, social studies). Energy requires all English teachers to obtain the TEA ESL Supplemental Certification within their first year of employment.
- Sheltered Instruction in PBL: Teachers embed language supports within interdisciplinary Project-Based Learning (PBL), including:
 - Visual supports, sentence stems, and structured academic conversations.
 - Scaffolds for reading, writing, listening, and speaking integrated into project tasks.
- Differentiation: Teachers use strategies aligned to students' proficiency levels while maintaining grade-level rigor.

Access to Curriculum and Activities

- EB students participate fully in the general education curriculum, electives, extracurricular activities, and culture-building events.
- Instructional supports ensure equitable access to advanced coursework, including AP classes and STEM pathways.

Monitoring and Exit

- LPAC reviews student progress at least annually and determines reclassification based on TAC criteria.
- Progress monitoring reviews data such as:
 - TELPAS scores and growth indicators.
 - Classroom performance and formative assessments.
 - NWEA MAP data for reading and math.
- Students exit services when they meet state-defined proficiency standards and demonstrate sustained academic success.

Participation in Standardized Testing

- EB students participate in all required state assessments (STAAR, EOC) with accommodations as outlined by TAC and LPAC decisions.

Staffing

- Energy Institute employs **ESL-certified teachers** and provides ongoing professional development in language acquisition strategies.
- LPAC compliance and instructional quality are overseen by campus leadership and district specialists.

e. A plan for providing services to students identified as intellectually gifted, including:

- **methods for appropriate identification of students**
- **the specific instructional programs, practices, and strategies the school will employ**

Energy Institute currently follows Houston ISD's GT testing and identification policies:

- **Referral Sources:** Students can be referred by teachers, parents, self, or through district recommendations, including universal screening in 2nd grade and automatic eligibility for 5th and 8th graders scoring above the 80th percentile on NWEA MAP tests in reading or math.
- **Multiple Criteria Evaluation:** HISD uses a matrix-based approach combining quantitative and qualitative data—including cognitive ability tests, achievement assessments, teacher observations, and report card evaluations. Students must accumulate sufficient points on the HISD G/T Identification Matrix to qualify.
- **Confirmation and Notification:** HISD issues eligibility notifications, and students remain identified while enrolled in HISD unless formally exited.

Instructional Programs, Practices, and Strategies

Energy Institute supports gifted learners through:

- **Differentiated PBL Curriculum:** Projects are enhanced with increased depth, complexity, and pacing, providing advanced analysis, research, and independent learning opportunities mirroring HISD Vanguard principles.
- **Targeted Grouping and Enrichment:** Gifted students may receive differentiated instruction within general classrooms, independent study time, or accelerated projects to foster challenge and relevance.

- **Accelerated Coursework:** GT-identified students are encouraged to enroll in advanced courses, including AP, STEM pathways, and technology-focused electives.
- **GT-Trained Educators:** All teachers delivering GT services have completed the state-required GT training, ensuring strategies aligned with critical thinking, creativity, and leadership development.

Student Recruitment and Enrollment

4. Provide the following:

a. A student recruitment and marketing plan.

- What is the timeline for implementation of this plan?
- How will you ensure all interested students and families, including those in poverty, students who have struggled academically, students with disabilities, and other youth at risk of academic failure, are equally included in this plan?

Energy Institute High School will implement a comprehensive recruitment strategy designed to attract a diverse student population and ensure equitable access for all families, including those in poverty, students with disabilities, English learners, and youth at risk of academic failure. We intend to follow a similar timeline each year to the one listed here, which is in use currently as we recruit students at the school:

Timeline for Implementation, 2025-26

Phase I

- **December 9, 2025:** K–12 applications open. Parents rank up to 10 choices and upload required documents.
- **February 27, 2026:** Applications close. All rankings and documents must be submitted.
- **April 8, 2026:** Parent Notification Day. Families receive one seat offer based on lottery results.
- **April 21, 2026:** Deadline for families to accept offered seats.

Phase II

- **April 8, 2026:** Phase II applications open. Parents select up to 10 choices.
- **TBD:** Applications close; waitlist retires.

Recruitment Strategies

- **School Choice Fairs:** Participate in HISD School Choice events to reach families across the district.
- **Middle School Visits:** Engage directly with feeder campuses to inform students and families about Energy's programs.
- **Campus Magnet Tours:** Host tours showcasing Energy's facilities, PBL model, and STEM pathways.
- **Community Engagement:** Organize recruitment coffees and information sessions in Houston-area neighborhoods to connect with families in informal settings.

Commitment to Ensuring Access for Students Across the District

Our school takes strategic actions to ensure all interested students and families are included:

- **Targeted Outreach:** Provide recruitment materials in multiple languages and distribute them through community centers, libraries, and local organizations serving economically disadvantaged families.
- **Accessibility:** Offer virtual and in-person sessions to accommodate families with transportation or scheduling challenges.
- **Special Populations:** Highlight supports for students with disabilities, English learners, and academically struggling students during presentations and tours.

b. As [Attachment 2](#), an Enrollment Policy that complies with state law, includes a description of the lottery process if more students choose to enroll at the campus than can be accommodated, and that ensures the school will be open to all eligible students.

[Attachment 2](#) included? ☐ YES ☐ NO

School Culture and Discipline

5. Provide the following:

- a. **A vision for school culture or ethos that will promote high expectations, a positive and safe academic environment, and shared ownership of intellectual and social development for all students, including students served in special education, emergent bilingual students, and students at risk of academic failure:**

Energy Institute High School fosters a school culture grounded in high expectations, inclusivity, innovation, and shared ownership of student growth. Our ethos is built on the belief that every student—regardless of background, language proficiency, disability status, or prior academic experience—can excel in a rigorous, future-forward learning environment. Energy’s unique combination of an energy-focused STEM theme, a project-based learning model, and a culture of public exhibition and industry engagement creates a dynamic academic community designed to prepare students for today’s rapidly evolving workforce.

Energy Institute’s culture is deeply connected to Houston’s role as the energy capital of the world. The school’s energy theme immerses students in real-world problem-solving, mirroring the complexity, innovation, and interdisciplinary nature of both renewable and traditional energy sectors. This thematic focus:

- Encourages students to see themselves as emerging engineers, designers, communicators, and leaders.
- Exposes students to a wide variety of energy-related careers—technical, engineering, scientific, and business-oriented.
- Builds pathways to high-demand, high-wage opportunities through field experiences, mentorships, and partnerships with local energy companies.
- Enhances workforce readiness by integrating cutting-edge technologies like AI, advanced modeling software, and industry data analysis.

Embedded within this culture is the expectation that every student is capable of contributing to solutions that matter.

At Energy, Project-Based Learning (PBL) is not a supplementary strategy; it is the core academic model that defines the culture of the school. PBL transforms students from passive recipients of information into active creators and problem-solvers. This culture promotes:

- Deep engagement by connecting academic content to real-world issues.
- Intrinsic motivation, as students make meaningful choices within their projects.
- Global Graduate Skills such as collaboration, communication, creativity, adaptability, and critical thinking.
- Equitable access to rigorous work, because PBL provides both scaffolds and enrichment within shared project experiences.

Students, including those who are members of special populations, work collaboratively to tackle interdisciplinary challenges that incorporate science, engineering, math, social studies, and English. The PBL environment reinforces the expectation that all students contribute meaningfully to shared intellectual work and community learning.

Energy Institute has cultivated a robust culture of public exhibition, where learning is made visible to the broader community. Exhibitions serve as culminating demonstrations of student mastery:

- Students present prototypes, research, models, and design solutions to authentic audiences.
- Industry professionals, parents, teachers, and community members provide feedback that mirrors real-world engineering and design critique.
- Exhibitions reinforce accountability, excellence, and pride in learning.
- Students with disabilities, emergent bilingual students, and academically at-risk students showcase their work alongside peers, reinforcing an inclusive culture where every student’s intellectual growth is valued.

At these exhibitions, the community sees students' curiosity, wonder, and applied knowledge come alive. Professionals frequently comment that students are solving problems similar to those addressed within their own companies, affirming the relevance and rigor of Energy's academic model.

Energy Institute's culture prioritizes belonging, safety, and shared responsibility for student success. This ethos includes:

- Consistent high expectations for behavior, engagement, and academic perseverance.
- Inclusive instructional practices ensuring that EB students and students served by special education have equitable access to grade-level content and project participation.
- Clear supports and structures, including MTSS, interdisciplinary PLCs, and strong relationships with industry mentors.
- Celebration of diverse perspectives and backgrounds, reinforcing that innovation emerges from inclusive collaboration.

At Energy, students are encouraged to take intellectual risks, ask questions, challenge assumptions, and care for one another. This creates a positive environment where students see themselves as capable contributors to complex challenges.

Energy's culture reinforces a shared belief that student development is the responsibility of the entire school community:

- Deans of Students develop four-year plans designed to support student academic growth and post-secondary success.
- Teachers collaborate across disciplines to design meaningful, integrated projects.
- Students take ownership of learning by taking on different roles in different projects, by participating in critique cycles, and by embracing leadership opportunities.
- Industry partners serve as mentors, advisors, and evaluators to enhance real-world connections.
- Families are welcomed as partners in educational planning and student growth.

This shared ownership ensures that all students—especially those at risk of academic failure—experience consistent support, encouragement, and challenge across their four years at Energy.

b. A plan for establishing the intended culture for students, teachers, administrators, and parents from the first day of school and throughout the school year and proposed mechanisms for monitoring and maintaining campus climate:

Energy Institute High School is intentional about cultivating a culture that is welcoming, collaborative, and aligned to the innovative academic model that defines the campus. The work of building this culture begins well before the first day of school and continues in structured, community-centered ways throughout the year.

Energy launches each new school year by welcoming students and families through Magnet Signing Night, a celebratory event where incoming students formally commit to joining the Energy community. This event establishes a sense of excitement, belonging, and shared identity for students and their families, and it provides an early opportunity for staff to articulate the expectations, values, and unique learning experiences that define the campus.

One of the most important culture-building practices at Energy is the Freshman Onboarding Process, anchored by a multi-day, offsite activity held in August before school begins. Our Freshman onboarding event serves as an immersive introduction to the habits, skills, and mindsets needed for success in Energy's project-based learning environment.

For example, Energy kicked off the 2025-2026 school year with Freshman Bridge Camp at Camp Forest Glen. There, students participated in ropes courses, problem-solving challenges, and cohort-based workshops to develop teamwork, communication skills, and critical thinking. Staff attended alongside students, modeling collaboration and relationship building. Because the offsite activity is such a transformative experience for more than 200 incoming students annually, the campus has prioritized securing sustainable funding so that every student has the opportunity to attend a similar event.

Energy's staff culture is similarly rooted in collaboration and shared ownership. New teachers experience this culture firsthand through the PBL 101 onboarding, an intensive professional learning experience where staff learn the foundations of

high-quality project-based learning and work together to design their first objective-aligned project. This collaborative planning process, where teachers brainstorm, prototype, revise, and refine project ideas, mirrors the learning cycle students will experience and reinforces the faculty's collective commitment to innovation, teamwork, and continuous improvement. Through weekly campus professional development, this collaborative spirit endures through project tuning protocols where colleagues present upcoming projects to receive feedback.

Parents and families are essential partners in establishing and sustaining school culture. Throughout the year, Energy hosts parent coffees, PTO mixers, and community exhibitions to strengthen relationships and create opportunities for families to participate actively in campus life. A signature event each fall is the Freshman Parent Coffee, held on campus during the first weeks of school. This gathering helps new families connect to one another, meet key staff, and learn more about Energy's expectations, supports, and community traditions. Community exhibitions (held twice a semester) invite families, industry partners, and neighbors to experience student work firsthand, reinforcing the pride and authenticity central to Energy's project-based learning model.

Monitoring and maintaining this culture is an ongoing priority. Energy conducts quarterly climate and culture surveys to gather feedback from students, staff, and families. These surveys inform leadership decisions regarding supports, communication, programming, and intervention systems. In addition to survey data, administrators observe classrooms, visit advisory groups, and engage with students and staff to ensure that the school environment remains positive, safe, inclusive, and aligned with the campus mission. Adjustments are made throughout the year to strengthen community cohesion, improve classroom experiences, and reinforce the values that guide the school.

Through strategic onboarding, community-centered events, collaborative staff practices, and consistent monitoring, Energy Institute High School cultivates a culture where students, families, and educators feel connected, supported, and invested in the shared work of learning.

c. A plan to create an inclusive and welcoming environment that will engage families in positive, constructive, and personalized ways:

Energy Institute High School is committed to building an inclusive, welcoming environment where families are partners in their student's educational journey. Our approach ensures that communication is clear and accessible, engagement opportunities are meaningful, and families have multiple avenues to participate in the life of the school.

Energy establishes strong lines of communication from the start by leveraging digital communication tools that keep families informed and connected. Weekly newsletters from both the campus and the PTO organization provide important updates, highlight student achievements, and share information about upcoming events, exhibitions, and opportunities for involvement. These regular communications allow families to stay engaged with the academic and cultural life of the school and ensure that families who may be new to the district, new to high school, or less familiar with the PBL model remain supported.

To strengthen the sense of belonging and help families engage directly with student learning, Energy hosts campus exhibitions twice each semester. These events invite families, industry partners, and community members to experience student work first-hand. Exhibitions provide parents with insight into the rigor and creativity of project-based learning while reinforcing the schoolwide culture of pride, collaboration, and authentic intellectual engagement. Families see their students articulate ideas, present prototypes, and respond to real-world challenges, helping them understand and celebrate the unique academic model at Energy.

Beyond exhibitions, Energy's leadership team collaborates with HISD departments to offer a series of evening family programming that supports families in navigating high school and college pathways. These sessions include the Freshman Parent 101 orientation and workshops on college admissions and financial aid navigation. Each of these events is designed to help families access critical information and resources that support academic success and postsecondary readiness.

Energy's PTO organization plays a central role in creating a welcoming school environment. In addition to community mixers and volunteer opportunities, the PTO offers a lecture series that addresses family interests and student support needs. For example, during the 2025–2026 school year, the PTO hosted a well-received session on supporting students with executive

functioning needs. These events foster community, strengthen home-school partnerships, and provide families with practical tools to support their students.

To ensure inclusivity for all families, Energy's front office offers bilingual support, enabling families who speak languages other than English to access information, ask questions, and participate fully in school life. This support reflects Energy's commitment to removing barriers and ensuring that all families receive equitable access to communication and engagement opportunities.

d. A system of proactive and responsive student support services (e.g., counseling, mentoring, external service referrals) to meet student needs:

We have a system of proactive and responsive student support services (e.g., counseling, speech therapy, external service referrals) to meet student needs. We currently follow Houston ISD procedures to collaborate with any needed providers for related services, ensuring the school has needed services in speech, OT, and PT; access to a school psychologist; audiology; cognitive testing; assistive technology; and any other required services.- All related service minutes, to include direct and indirect services, will be provided by licensed and credentialed staff in accordance with a student's IEP or 504 plan.

e. As [Attachment 3](#), a student discipline policy that provides for appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture while respecting student rights:

[Attachment 3](#) included? ☐ YES ☐ NO

f. Legally sound policies for student discipline, suspension, and expulsion, including how these policies protect students' rights to due process:

Energy Institute High School maintains high expectations for student behavior and a structured system of disciplinary responses designed to support a safe, respectful learning environment. All policies will align with the Texas Education Code, and our current policies also match Houston ISD Board Policy and the HISD Student Code of Conduct.

Disciplinary consequences are designed not as punitive measures but as interventions to deter misconduct, reinforce expectations, and support positive growth. All actions are guided by three core principles:

1. Clear Communication of Expectations – Students and parents will receive the school's code of conduct during the first week of school, and families must digitally acknowledge receipt.
2. Consistency and Proportionality – Responses to misconduct follow a tiered system that matches consequences to the severity and frequency of behavior.
3. Protection of Student Rights – Students are entitled to due process, including notice of the alleged misconduct, an opportunity to respond, and the right to appeal disciplinary decisions as allowed by the school's policy and state law.

Code of Student Conduct

Our school has found success using the Houston ISD framework, and each year, Houston ISD publishes the Student Code of Conduct, which outlines behavioral expectations and the procedures for addressing misconduct. Energy currently adheres fully to this district framework. Misconduct is organized into five progressive levels:

- Level I: Minor classroom disruptions or rule violations addressed by the teacher through redirection, parent contact, or classroom consequences.
- Level II: More serious or repeated violations requiring administrative action. Students may be placed on a behavior growth plan, and repeated Level II offenses may affect a student's transfer status for the following year.
- Level III: Serious misconduct that disrupts the instructional environment or continues despite prior interventions. Students are placed on a growth plan that may impact their ability to remain at Energy the following school year.
- Level IV: Felony offenses or significant criminal conduct that may require placement in a Disciplinary Alternative Education Program (DAEP).

- Level V: The most serious offenses—such as assault, weapon possession, or drug distribution—that may result in expulsion, consistent with state law.

Disciplinary Measures Used at Energy

Energy utilizes a range of disciplinary actions to respond appropriately to student behavior while maintaining the student's right to access instruction whenever possible.

- Verbal Warning/Conference: A teacher–student conference to address the behavior and provide clear redirection.
- Administrative Directive: A written or verbal directive outlining the required change in behavior, shared with the student and parent.
- Detention: Assigned during lunch or before/after school with academic expectations.
- In-School Suspension (ISS): The student remains on campus and completes schoolwork in a supervised location separate from the classroom.
- Off-Campus Suspension (OSS): The student is temporarily removed from the campus and prohibited from attending school activities during the suspension period.
- DAEP Placement: Required for certain Level III and IV offenses. The policy the school currently uses mandates a 15-day minimum placement, during which the student must withdraw from Energy to attend the designated program.
- Expulsion: Applied only in accordance with state law and school policy for Level V offenses and persistent misbehavior in DAEP.

Due Process Protections

Energy follows all legally required due process procedures before assigning serious disciplinary consequences such as suspension, DAEP placement, or expulsion. Students and families are provided:

- Written notice of the alleged misconduct and potential consequences.
- An opportunity to present their perspective, including relevant evidence or context.
- A disciplinary conference with an administrator before finalizing decisions involving OSS, DAEP, or expulsion.
- Access to appeals, following school policy and Texas Education Code guidelines.

These protections ensure that decisions are fair, transparent, and compliant with state requirements.

Focus on Growth and Support

At every level of the discipline system, Energy emphasizes student growth rather than punishment. All students are assigned a Dean of Students who handles any disciplinary actions related to their students. Deans work with their individual students across their time at Energy to ensure a focus on continual growth and proactive behavior strategies. Behavior growth plans are used for repeated Level II or Level III behaviors and outline specific expectations, supports, and monitoring strategies.

g. Systems and processes for tracking discipline referrals and interventions to identify trends and adapt activities accordingly:

Energy Institute High School maintains a proactive and data-driven approach to monitoring student behavior, identifying trends, and implementing interventions that support a positive and safe school climate. Discipline referrals and interventions are currently tracked through Houston ISD's student information system (PowerSchool), which provides real-time, campus-wide access to behavioral data. This or a similar centralized platform allows administrators, deans, counselors, and teachers to document incidents, track intervention histories, and identify patterns in student behavior over time.

The use of the system enables Energy to maintain consistent reporting practices aligned with school policy. Through comprehensive dashboards and reporting tools, campus leaders can analyze discipline data by grade level, time of day, location, teacher, or student group. These insights support meaningful decision-making and help the leadership team adapt programming, supervision, and supports to improve climate and safety.

In addition to tracking incidents, the system allows staff to log interventions such as parent conferences, restorative conversations, behavioral contracts, and MTSS supports. This ongoing documentation ensures continuity of care and helps the campus identify students who may need targeted or intensified interventions. Weekly leadership meetings include discipline

data review, allowing administrators and deans to collaborate on responsive strategies tailored to individual student needs or broader campus trends.

Assessment and Evaluation

6. Provide the following:
- a. **Annual student performance goals that include targets aligned with the state accountability system:**

Goal Creation Methodology

Energy Institute High School uses a systematic, data-driven methodology to develop annual academic goals that align directly with the Texas Education Agency (TEA) accountability framework. Each year, the Instructional Leadership Team (ILT) leads a goal-setting process that centers on measurable outcomes in STAAR performance, Closing the Gaps indicators, and College, Career, and Military Readiness (CCMR) achievement. This process ensures that campus goals are rigorous, actionable, and tailored to the needs of each specific graduating class.

The ILT begins the process by conducting a comprehensive analysis of the most recent and relevant student performance data. Because TEA’s accountability model evaluates performance over time and by graduating class, Energy establishes goals by examining the historical data of the students who are currently progressing through the campus. For example, academic outcome data from students’ 8th-grade year (including STAAR performance, growth indicators, and subgroup performance) served as the basis for setting the current year’s goals for the Class of 2029 (current 9th graders). This specific approach ensures that expectations are grounded in a realistic understanding of students’ entering proficiency levels while remaining aligned to state accountability targets.

The ILT then aligns each proposed goal to the structure of the TEA accountability domains, ensuring that expectations for proficiency, academic growth, and CCMR readiness reflect state metrics. Goals may include targets for overall student performance as well as subgroup-specific targets that directly address achievement gaps. Special attention is given to historically underserved student groups, including English Learners, students receiving special education services, and economically disadvantaged students. By explicitly connecting each goal to a corresponding TEA metric, the ILT ensures vertical alignment between campus planning, instructional priorities, and state expectations.

The team also considers external factors such as assessment changes, shifts in CCMR criteria, or evolving graduation requirements. Goals are then finalized with clear performance indicators, benchmarks, and monitoring timelines that will guide instructional planning, professional development, resource allocation, and intervention strategies throughout the school year.

2025-2026 Goals

(High Quality Instruction) Key Action 1: Project rubrics are created for project deliverables and are clearly aligned to targeted learning objectives.

Indicator of Success 1	By June 2026, 100% of the PPGs for the 25-26 school year will include hyperlinked rubrics for project deliverables.
Indicator of Success 2	Rubrics are readily accessible in the classroom and are referenced throughout the project for expectation-setting, critique, refinement, and reflection.
Indicator of Success 3	In the 2025-2026 school year, teachers will participate in 3 rubric tuning protocols to critique and refine project rubrics.
Indicator of Success 4	In the 2025-2026 school year, the Instructional Leadership Team will calibrate monthly using the specialty guidance SPOT form, focusing on Domain 1:

	Planning rubric language.
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(CCMR) Key Action 2: College Readiness: The campus increases the number of students who are college ready in both Math and English.

Indicator of Success 1	By July of 2026, 100% of the students in the Class of 2026 will be college ready in English and Math (SAT/ACT/TSIA/TCB)
Indicator of Success 2	By July of 2026, 60% of the students in the Class of 2027 will be college ready in English and Math (SAT/ACT/TSIA/TCB).
Indicator of Success 3	100% of math teachers will incorporate TEK-aligned College Board SAT/PSAT Question Bank items 2 times each 6 weeks.
Indicator of Success 4	100% of 9th-11th Grade cohorts will develop 3 targeted PSAT/SAT prep activities into their PBL Skills curriculum.

(CCMR) Key Action 3: Ensure successful implementation and completion of CTE Program of Study to support CCMR outcomes, with a focus on POS programs.

Indicator of Success 1	By June 2026, 65% of our Class of 2026 students will earn an Industry-Based Certification in an engineering-related IBC.
Indicator of Success 2	By June of 2026, 80% of our Class of 2026 graduates will earn CTE completer status .
Indicator of Success 3	By May of 2026, 100% of our engineering teachers will be trained on engineering-related IBC certification requirements and instructional best practices.

(Emergent Bilingual) Key Action 4: Campus improves English proficiency for Emergent Bilingual students.

Indicator of Success 1	By June 2026, 65% of students will grow one level of Proficiency, defined as SY24-25 composite to SY25-26 composite on TELPAS.
Indicator of Success 2	By May of 2026, 75% percent of Emergent Bilingual students will meet the passing standard on their first attempt at STAAR English I or English II.
Indicator of Success 3	100% of our EB students will complete a TELPAS bootcamp prior to the TELPAS assessment.
Indicator of Success 4	100% of PBL Skills classes will incorporate 3 Energy Table Talks each six weeks as a way to provide authentic reading, writing, listening, and speaking opportunities aligned to global issues.
Indicator of Success 5	100% of our teachers will upload evidence of prompt-based academic writing that includes content-specific vocabulary every 6 weeks.

(STAAR) Key Action 5: Campus will improve performance for STAAR English I & II EOC in achievement.

Indicator of Success 1	By May 2026, 83% of our Class of 2029 (freshmen) and Class of 2028 (sophomores) will score a “meets standard” on the STAAR English I and
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	English II EOC.
Indicator of Success 2	100% of our English I and English II teachers will plan at least three targeted small group interventions based on Interim STAAR data.
Indicator of Success 3	100% of 9th-10th grade humanities teachers will incorporate and assess two, evidence-based quickwrites each six weeks.

(STAAR) Key Action 6: Campus will improve performance for STAAR Algebra I EOC in achievement.

Indicator of Success 1	By May 2026, 63% of our Class of 2029 (freshmen) will score “meets standard” on the STAAR Algebra I EOC.
Indicator of Success 2	100% of our Algebra I teachers will plan at least three targeted small group interventions based on Interim STAAR data.
Indicator of Success 3	100% of our Algebra 1 teachers will integrate STAAR and/or PSAT-aligned assessment questions into every unit.

2026-2027 Draft Goals (Goals will be calibrated based on 25-26 student academic outcomes for each graduating cohort.)

(High Quality Instruction) Key Action 1: Project rubrics are created for project deliverables and are clearly aligned to targeted learning objectives and Global Graduate Skills.

Indicator of Success 1	By June 2027, 100% of the PPGs for the 26-27 school year will include hyperlinked rubrics for project deliverables.
Indicator of Success 2	Rubrics are readily accessible in the classroom and are referenced throughout the project for expectation-setting, critique, refinement, and reflection.
Indicator of Success 3	In the 2026-2027 school year, teachers will participate in 3 rubric tuning protocols to critique and refine project rubrics. Industry professionals will be included in at least one critique and refinement protocol.
Indicator of Success 4	In the 2026-2027 school year, the Instructional Leadership Team will calibrate monthly using High Quality Project Based Learning characteristics, focusing on T-TESS Dimension 1.1 (Standards and Alignment) and Dimension 2.5 (Monitor and Adjust).

(CCMR) Key Action 2: College Readiness: The campus increases the number of students who are college ready in both Math and English.

Indicator of Success 1	By July of 2027, 100% of the students in the Class of 2027 will be college ready in English and Math (SAT/ACT/TSIA/TCB)
Indicator of Success 2	By July of 2027, 65% of the students in the Class of 2028 will be college ready in English and Math (SAT/ACT/TSIA/TCB).
Indicator of Success 3	100% of math teachers will incorporate TEK-aligned College Board SAT/PSAT Question Bank items 2 times each 6 weeks.
Indicator of Success 4	100% of 9th-11th grade cohorts will develop 3 targeted PSAT/SAT prep activities to use as part of their PBL Skills curriculum.

(CCMR) Key Action 3: Ensure successful implementation and completion of CTE Program of Study to support CCMR outcomes, with a focus on POS programs.

Indicator of Success 1	By June 2027, 70% of the Class of 2027 students will earn an Industry-Based Certification in an engineering-related IBC.
Indicator of Success 2	By June of 2027, 83% of the Class of 2027 graduates will earn CTE completer status .
Indicator of Success 3	By May of 2027, 100% of our engineering teachers will be trained on engineering-related IBC certification requirements and PLTW instructional best practices.

(SPED) Key Action 4: The principal ensures IEPs are written effectively, staff are provided relevant portions of the IEP, and accommodations are documented in PowerSchool.

Indicator of Success 1	By the end of the 2026-2027 school year, the Principal will ensure that 100% of IEPs include specific, clear, and measurable goals tailored to each student's unique needs, as verified through random quarterly reviews.
Indicator of Success 2	Throughout the 2026-2027 school year, 100% of staff members receive the relevant portions of the IEP within 3 days of its finalization as demonstrated by campus record keeping.
Indicator of Success 3	100% of PowerSchool records show consistent documentation of accommodations in PowerSchool at every report card window.

(Emergent Bilingual) Key Action 5: Campus improves English proficiency for Emergent Bilingual students.

Indicator of Success 1	By June 2027, 65% of students will grow one level of Proficiency, defined as SY25-26 composite to SY26-27 composite on TELPAS.
Indicator of Success 2	By May of 2027, 75% percent of Emergent Bilingual students will meet the passing standard on their first attempt at STAAR English I or English II.
Indicator of Success 3	100% of our EB students will complete a TELPAS bootcamp prior to the TELPAS assessment.
Indicator of Success 4	100% of PBL Skills classes will incorporate 3 Energy Table Talks each six weeks as a way to provide authentic reading, writing, listening, and speaking opportunities aligned to global issues.
Indicator of Success 5	100% of our teachers will upload evidence of prompt-based academic writing that includes content-specific vocabulary every 6 weeks.

(STAAR) Key Action 6: Campus will improve performance for STAAR English I & II EOC in achievement.

Indicator of Success 1	By May 2027, 86% of our Class of 2030(freshmen) and Class of 2029 (sophomores) will score a “meets standard” on the STAAR English I and English II EOC.
Indicator of Success 2	100% of our English I and English II teachers will plan at least three targeted

	small group interventions based on Interim STAAR data.
Indicator of Success 3	100% of 9th-10th grade humanities teachers will incorporate and assess two, evidence-based quickwrites each six weeks.

(STAAR) Key Action 7: Campus will improve performance for STAAR Algebra I EOC in achievement.

Indicator of Success 1	By May 2027, 66% of our Class of 2030 (freshmen) will score “meets standard” on the STAAR Algebra I EOC.
Indicator of Success 2	100% of our Algebra I teachers will plan at least three targeted small group interventions based on Interim STAAR data.
Indicator of Success 3	100% of our Algebra 1 teachers will integrate STAAR and/or PSAT-aligned assessment questions into every unit.

b. A plan to implement and interpret interim assessments that measure academic progress – of individual students and student cohorts – throughout the school year:

Energy Institute High School uses an annual data cycle to monitor academic progress of individual students and cohorts, inform Tier I instruction, and drive timely MTSS (Tier 2 and Tier 3) supports. The Dean of Instruction (DOI) leads the assessment program end-to-end—compiling, analyzing, and reporting interim data; facilitating PLC data dives; and coordinating structured supports with the Deans of Students. Executive summaries of interim results are prepared for the operating partner after each assessment window.

Assessment Types May Include:

- **NWEA (Math and Reading):** Standards-aligned interim assessments administered **3x/year** (Fall, Winter, Spring) in core content areas.
- **Practice PSAT, SAT:** Administered once per year for vertical coherence and growth analysis.
- **Interim STAAR (English I, English II, Biology, Algebra I, US History):** Administered 1 per year (early Spring) to monitor STAAR achievement gaps
- **Performance Tasks/Project Rubrics:** Applied assessments aligned to the school’s STEM/energy pathways and PBL units **per unit/quarter**.

c. A plan and system for collecting and analyzing student academic achievement data, reporting the data to the school community, and using the data to refine and improve instruction (including dedicated time for providing training and support to school leadership and teachers):

Reporting Cadence

Instructional Leadership Team (ILT) Reports (reported within 7 days post interim)

Contents:

- Executive snapshot (campus proficiency/growth; top 3 strengths, top 3 priorities).
- Standard-level heat maps (by course/teacher).
- Subgroup gap analysis and action flags

The Dean of Instruction presents findings and secures decisions on re-teaching calendars, resource reallocation, and professional development focus.

Operating Partner Executive Summaries (reported within 10 days post interim)

Contents:

- Key Outcomes: Campus-wide proficiency and growth compared to prior window and yearly targets
- Equity Lens: Subgroup performance and addressed gaps

- Instructional Adjustments: Tier 1 changes

The Executive Director distributes and archives the summary in a shared governance folder.

d. The corrective actions that the school and network (if applicable) will take if either falls short of the goals at any level, including explanation of what would trigger such actions and who would implement them:

Energy Institute High School follows a structured, transparent, and data-driven system for monitoring progress toward annual student academic outcome goals and state accountability targets. At the midpoint of each school year, the Executive Director conducts a comprehensive mid-year evaluation of campus performance. This review includes an analysis of interim assessment data, cohort-level progress toward proficiency and growth goals, MTSS effectiveness, and early indicators related to state accountability domains. The purpose of the mid-year evaluation is to determine whether the campus is on track to meet the academic goals established at the beginning of the year and to identify areas where additional support or intervention is necessary.

If any academic goal is identified as off track, the Executive Director initiates a formal growth plan for that indicator. Growth plans serve as targeted corrective action tools and remain in place until the school demonstrates sustained improvement. Each plan includes:

- Clear performance gaps and the evidence used to identify them.
- Monthly milestones and progress-monitoring measures.
- Specific responsibilities for both the Executive Director and the Instructional Leadership Team (ILT).
- Coaching and support structures, including increased frequency of administrative walk-throughs, targeted instructional coaching cycles, and strengthened PLC data routines.

The ILT plays a central role in implementing corrective actions. Under the guidance of the Executive Director, the ILT coordinates Tier I instructional adjustments, refines intervention structures, oversees teacher support and development, and ensures fidelity to re-teach calendars and student progress monitoring. Monthly updates on each growth plan are reviewed in ILT meetings and shared with the operating partner. If progress remains insufficient, corrective actions may intensify to include additional coaching support, restructuring of intervention time, adjustment of instructional staff assignments, or reallocation of resources to high-need areas.

At the conclusion of the school year, the end-of-year evaluation provides a summative review of performance relative to student outcome goals and final state accountability metrics. This evaluation is delivered to the operating partner and the board and includes an analysis of improvements made through corrective action cycles as well as persistent gaps that require continued attention.

While the goal of all corrective actions is to strengthen performance through support and capacity-building, Energy maintains responsibility for ensuring strong academic outcomes for students. In cases where the campus does not demonstrate adequate improvement despite the implementation of growth plans and sustained support, the board may determine that leadership changes are necessary. As part of its annual evaluation process, the board may consider non-renewal of the Executive Director or members of the Instructional Leadership Team if persistent underperformance indicates that leadership interventions have not resulted in the necessary gains. This decision is approached with care, informed by longitudinal data, and made only after other corrective actions have been exhausted.

Energy's corrective action system ensures timely identification of performance concerns, the implementation of structured supports, and clear accountability for results, ensuring that Energy Institute High School remains focused on meeting its academic mission and delivering high-quality outcomes for all students.

Section 3 – Governance, Operating Plan, and Capacity

A strong Operations Plan is coherent overall and aligned internally with the school's mission and vision, Educational Program, and Financial Plan.

Organizational Structure

7. Provide the following:

- a. As [Attachment 4](#), an organizational chart that indicates all positions and lines of authority.

Attachment 4 included? ☐ YES ☐ NO

- b. The name(s), title(s), and a description of the daily responsibilities of the person(s) employed by the operating partner that will be responsible for the management of each campus:

Name	Title	Date Started with Organization	Campus to be Managed	Description of Daily Responsibilities <i>(indicate the person who will be the principal's direct supervisor here)</i>
Lori Lambropoulos	Executive Director	2013-2014 Founding Principal	Energy Institute High School	<ul style="list-style-type: none"> Supervised by the Board Provide daily coaching, guidance, and support to the Instructional Leader through classroom walkthroughs, instructional planning conversations, and review of academic data. Monitor and address campus operational needs, including staffing, scheduling, facilities issues, safety updates, and student support trends. Supervise the Program Coordinator to ensure timely and accurate execution of grant-related tasks such as reporting, procurement, logistics, and documentation. Direct and prioritize the day-to-day work of the Development Coordinator/Manager to ensure donor engagement activities, storytelling, school tours, and community communications align with school operations. Maintain ongoing communication with EIHS leadership and HISD partners to ensure compliance with TEA requirements, district expectations, and partnership agreements. Conduct daily campus presence activities—visiting classrooms, being present during passing periods, engaging with students and teachers—to uphold a positive school culture.

				<ul style="list-style-type: none"> ● Prepare updates, dashboards, or briefing materials for the Friends Board regarding academic progress, grant performance, operational risks, and campus highlights. ● Review critical school and organizational data (attendance, discipline, assessment snapshots, budget usage, grant spend-down) to inform immediate action steps and coaching. ● Coordinate with industry, community, and postsecondary partners to support project-based learning experiences, guest speakers, mentorships, and student exhibitions. ● Participate in or lead key school events, including student showcases, family interactions, teacher check-ins, and community activities, to strengthen visibility and relationships.
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c. **The proposed school’s legal status (e.g., non-profit and federal tax exempt) and structure that comply with [TEC 12.101\(a\)](#).**

Friends of Energy is a non-profit that has secured federal tax-exempt status. As it moves from being a support organization to a governing organization, it will alter its bylaws and other organizational documents accordingly.

Governing Board

8. Provide evidence of the following:

a. **The independence of the board as it relates to the authorizer:**

No member of the Friends of Energy board is a member of the governing body for the Houston Independent School District, the district superintendent, or a district employee involved in the selection or oversight of district charter partnerships.

b. **Plans for the board(s) to evaluate the success of the school(s) and school leader(s), including planned frequency of meetings and standing committees:**

The board is committed to ensuring that the school meets ambitious performance goal set in collaboration with the Houston Independent School District. In evaluating the executive director, Friends of Energy will prioritize assessment of the school’s progress toward these goals.

The board will complete an annual formal evaluation of the organization’s executive director, and the executive director will have annual goals tied tightly to the school’s performance goals; in addition to its assessment of progress toward these goals providing the foundation of the formal evaluation of the executive director, the board will monitor

progress toward these goals regularly throughout the year. The executive director will provide a formal update on progress toward goals at least three times per year.

Criteria for evaluating the executive director will be rooted in the performance goals of the contract, but will also include the leaders's effectiveness in managing the school's principal and in working collaboratively with the school community. The board will develop a clear and transparent process for evaluating the executive director that includes assessment of both progress toward performance goals and assessment of the leader's demonstration of defined leadership competencies.

In order to ensure high-quality governance, the board plans to meet at least 8 times per year. Key responsibilities of the board will include the hiring, monitoring, and evaluation of the executive director; approval of the annual budget; and execution of the contract with the Houston Independent School District and all nonprofit organizational responsibilities.

At this time, the board plans to have three committees: finance, evaluation, and fundraising/community partnerships. These committees will regularly update the full board on their work to ensure alignment and provide effective governance of the school.

- c. **As Attachment 5, appropriate bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances that will minimize real or perceived conflicts.**

Attachment 5 included? ☐ YES ☐ NO

- d. **As Attachment 6, a Board Member Information Sheet and resume for each proposed Board Member.**

Attachment 6 included? ☐ YES ☐ NO

- e. **A description of how the proposed governing board members' knowledge and skills make them qualified to oversee a successful charter school, including educational, financial, legal, and community experience and expertise:**

Energy Institute High School's governing board brings together seasoned expertise in education and instructional leadership, finance and audit, legal and compliance, STEM/engineering and energy operations, and community engagement. Collectively, the board offers the exact mix of strategic oversight and mission alignment required to steward a rigorous, project-based engineering program that serves a diverse student population and sustains excellence over time.

Collective Capacity Aligned to Mission

As the first energy-themed high school in the nation, Energy requires a board that understands both high-quality teaching and learning and the technical and workforce realities of the energy sector. The board satisfies that need in four ways:

1. **Educational Expertise & PBL Oversight:** Members with extensive classroom, AP, PBL, and adult-learning leadership experience ensure the board can interrogate instructional quality, monitor student outcomes, and support staff development aligned to T-TESS and TEA expectations.
2. **Financial Stewardship:** Veteran finance professionals and a Certified Public Accountant provide robust fiscal oversight—budgeting, audits, controls, tax compliance, and long-range financial planning—ensuring sustainability and transparency.
3. **Legal & Compliance Governance:** A higher-education attorney and compliance leader brings deep experience in board policy, contracts, student affairs, Title IX, risk management, and accreditation—safeguarding student rights and institutional integrity.

4. STEM, Engineering, and Industry Insight: Senior leaders from power generation and technology development, a critical-minerals innovator with 100 U.S. patents, and an Energy alum in chemical engineering keep the board grounded in real-world, current industry practice—vital for advising on pathways, partnerships, safety, and workforce readiness.

The result is a governing body capable of sound fiduciary management, instructional accountability, and strategic industry partnership, all in service of student achievement and equitable access to rigorous opportunities.

This governing board couples academic know-how with financial discipline, legal compliance, and industry relevance. Members have led complex organizations, designed and evaluated learning systems, stewarded public funds, managed risk, and built durable community partnerships. They understand how to read performance dashboards, ask probing questions about instruction and interventions, protect student rights, and align resources to goals. Importantly, several members have direct ties to Energy Institute (as former faculty, board supporters, mentors, and alumni) ensuring continuity of mission and a deep commitment to students and families.

f. A plan and timeline for board recruitment (including the desired experience and qualifications of future board members), initial board training, expansion, orientation of new members, and ongoing training for members:

The current Friends of Energy board is well positioned to govern Energy Institute High School effectively. As the organization takes on this new role, we will take several steps to ensure continued success at the school:

- Modify the nonprofit's bylaws and other organizational documents to accurately describe the way it will execute its new governance role
- Focus board meeting time on orientation to the nonprofit's new role
- Launch the three committees described above
- Create a clear, transparent evaluation process for the executive director
- Create a board matrix describing the skillset of current board members to use in planning for potential board expansion and/or replacement as current members cycle off. Prioritized skills include:
 - the implementation and oversight of education programs
 - financial oversight of schools and/or non-profit organizations
 - implementing legal requirements for schools and/or non-profit organizations
 - community engagement
- Develop an annual board self-evaluation process that includes assessment of the board's capacity and skillsets and a recruiting plan for the upcoming year
- Develop an onboarding plan for new board members that includes clear training and orientation to Friends of Energy and the school's mission and history
- Provide ongoing training in the requirements applicable to the governing board of a campus charter school, including the Texas Open Meetings Act.

g. Sufficient capacity within and/or an appropriate relationship to any pre-existing non-profit board:

Friends of Energy has sufficient capacity to govern Energy Institute High School effectively. The board includes civic leaders with deep experience in the energy industry, helping to ensure that our school will stay true to its innovative and successful theme. In addition, board members have expertise in accounting, business, education, and education law. With this experience, the board has the capacity to lead in four key areas:

1. Educational Expertise & PBL Oversight
2. Financial Stewardship
3. Legal & Compliance Governance
4. STEM, Engineering, and Industry Insight

As mentioned above, the board will create a board matrix to keep track of key skillsets aligned with these categories, including the implementation and oversight of education programs; financial oversight of schools and/or non-profit organizations; implementing legal requirements for schools and/or non-profit organizations; and community engagement. Using this matrix, the board will ensure that over time the board continues to possess the expertise necessary to lead the school successfully.

Application Team Capacity

9. Provide the following:

a. Describe the collective qualifications of the applicant team to implement the school design successfully, including each team member's experience and evidence of measurable success in:

- School leadership, administration, and governance
- Implementing systems for curriculum, instruction, and assessment
- Performance management

The applicant team brings together a deeply experienced group of school leaders, instructional experts, governance professionals, and industry partners whose combined expertise directly supports the successful implementation of the proposed school design. Collectively, the team demonstrates measurable success in school leadership and governance, curriculum and instructional system design, assessment management, and performance management across K–12 and higher-education contexts.

The school's leadership team is anchored by Principal Lori Lambropoulos, a nationally recognized educator with more than 30 years of experience and a proven record of founding, scaling, and sustaining a high-performing STEM magnet school.

Supporting her is a team of veteran administrators:

- **Noelle MacGregor**, founding team member and Assistant Principal/Dean of Students, who co-designed the original instructional model and has more than 20 years of experience in student supports, discipline systems, scheduling, and PBL-aligned leadership. She oversees ARD/504/IAT processes and serves as a T-TESS appraiser.
- **Lauren Garcia**, Assistant Principal/Dean of Students, who manages master scheduling, CCMR tracking, LPAC leadership, CTE compliance, and school safety operations. Her work ensures strong operational alignment with accountability indicators and student pathways.
- **Stephanie Collins**, Campus Testing Coordinator, with more than two decades of leadership in assessment, equitable discipline systems, crisis management, and instructional coaching. She oversees all standardized testing and technology deployment.
- **Nicholas Champion**, Dean of Students, who leads discipline systems, restorative practices, HB 1416 interventions, and teacher coaching, drawing on leadership experience in fine arts and PBL.
- **Elizabeth Harris**, Dean of Instruction, an experienced instructional administrator with more than a decade of expertise in PBL, teacher coaching, interdisciplinary curriculum design, professional development systems, and AP coordination. She leads the school's annual TEA-aligned action plan and campuswide instructional appraisal cycles.

The Instructional Leadership Team at Energy Institute High School brings together a complementary set of strengths that drive cohesive campus leadership, instructional alignment, and strong academic outcomes for students. Deans of Students, Nicholas Champion, Lauren Garcia, and Noelle MacGregor reinforce the connection between school culture and academic achievement by leading restorative practices, coordinating targeted interventions, and supporting teachers in implementing student-centered instructional strategies. Stephanie Collins, Campus Testing Coordinator, maintains rigorous assessment systems by overseeing all testing operations, ensuring data accuracy, and providing actionable insights that guide instructional adjustments and intervention planning. Lauren Garcia, Assistant Principal and Master Scheduler, ensures that instructional structures align with student needs by coordinating the master schedule, monitoring CCMR indicators, leading LPAC processes, and supporting college-readiness initiatives that keep students on track for graduation. Noelle MacGregor, Assistant Principal and founding leadership team member, contributes extensive expertise in PBL, student support, and program development, strengthening the consistency and quality of interdisciplinary instruction. Elizabeth Harris, Dean of Instruction, elevates instructional practice through campuswide professional development, teacher coaching, and oversight of the TEA-aligned

annual action plan, ensuring that curriculum, instruction, and assessment systems remain coherent and focused on student success. Together, these leaders form an integrated team that aligns instructional systems, supports teacher effectiveness, and ensures that students have equitable access to high-quality learning experiences that drive sustained academic growth.

The applicant team is further strengthened by the **Friends of Energy Governing Board**, which provides governance, fiduciary oversight, legal guidance, and industry alignment through leaders in finance, legal compliance, engineering innovation, energy-sector operations, strategic finance, and alumni workforce experience:

- **Rhett M. Davis**, MBA, BSME — senior energy-sector operations and P&L leader.
- **Kathleen K. Kahanek**, CPA — veteran finance, audit, and nonprofit stewardship professional.
- **Lucie M. Shipp Tredennick**, J.D., CCEP — higher-education counsel specializing in compliance, contracts, and governance.
- **Rod Shampine, Ph.D., P.E.** — distinguished engineer, inventor, and longtime FIRST Robotics mentor.
- **Aline Pham**, MBA — strategic finance and innovation professional in the energy sector.
- **Brock D. Lewis**, B.S. ChE — Energy Institute alumnus and chemical-engineering professional supporting workforce alignment.
- **Julie Z. Zachary (Lockhart)**, M.Ed. — global learning leader specializing in organizational capability, leadership development, technical-skills training systems, and innovation-driven learning strategy.

The applicant team represents a highly capable and cohesive group of educators, administrators, industry leaders, and governance professionals whose expertise aligns directly with the demands of the proposed school design. Their collective experience demonstrates a strong record of founding and sustaining innovative schools, implementing rigorous instructional and assessment systems, maintaining high levels of academic and operational accountability, and cultivating long-term partnerships that enhance student opportunities. Together, they provide the strategic vision, operational strength, instructional depth, and governance capacity necessary to ensure the successful launch, implementation, and long-term success of the school.

b. As [Attachment 7](#), include the résumés and bios for all members of the applicant team.

[Attachment 7](#) included? ☐ YES ☐ NO

c. Describe the proposed School Leader's experience in and ability to design, launch, and lead a school and implement the specific educational program being proposed, OR describe the board's plan to recruit and retain a leader with the ability to implement the specific educational program being proposed (*if School Leader candidate(s) is not yet identified*):

In the leadership model that our organization will implement, the board will supervise an executive director who will provide overall leadership for the school and nonprofit. This executive director will in turn supervise the school leaders, who will also possess specialized skills to allow for successful implementation of the Energy Institute High School model.

Our designated executive director, Lori Lambropoulos, is a highly accomplished and award-winning educational leader with more than three decades of experience in public education and a proven record of designing, launching, and sustaining innovative, high-performing schools. Her background reflects deep expertise in STEM education, project-based learning (PBL), industry-connected programming, school design, and organizational leadership. She holds a Master of Science in Educational Leadership from Stephen F. Austin State University and Texas Principal Certification, along with a long list of personal and school-based awards recognizing excellence, innovation, and equity in education.

Experience in Designing and Launching Schools

Ms. Lambropoulos was the founding principal of Energy Institute High School, the nation's first energy-themed STEM magnet high school. She successfully launched the school in 2013, establishing its instructional design, operational systems, staffing model, project-based learning framework, and industry-driven programming. Under her leadership, the school grew to an enrollment of 750 students and gained national recognition for innovation.

She led the planning and design of the school’s state-of-the-art \$37 million facility, ensuring that the building’s architecture, collaborative spaces, engineering labs, and flexible learning environments were aligned to STEM instruction and whole-school PBL implementation. Her ability to integrate facility design with instructional vision demonstrates the systems-level leadership needed for a successful school launch.

Leadership of Instructional Program and School Systems

Ms. Lambropoulos has extensive expertise implementing and sustaining project-based learning at scale, having developed an instructional model in which every student engages in interdisciplinary PBL, authentic industry challenges, and engineering design processes. She created schoolwide systems for professional development, teacher coaching, assessment, and project quality assurance that have been cited nationally as models for PBL implementation.

Operational, Financial, and Partnership Leadership

Ms. Lambropoulos has demonstrated strong operational and financial management skills. As founding principal, she managed a \$1.5 million federal Magnet Schools Assistance Program (MSAP) grant over five years, ensuring successful implementation, compliance, and impact.

She developed and chaired the school’s advisory board of more than 25 industry partners, cultivated long-term corporate relationships, and helped launch the school’s 501(c)(3) support organization, Friends of Energy. Through her leadership, the school secured over \$1.5 million in external donations from industry partners and philanthropic donors over thirteen years.

These partnerships not only strengthened financial sustainability but also embedded authentic engineering and energy-sector experiences into the student experience—central to the educational model being proposed.

Recognition and Track Record of Results

Under Ms. Lambropoulos’s leadership, Energy Institute High School has earned an “A” rating in Texas state accountability for multiple consecutive years and received national recognition including the Magnet Schools of America Donald R. Waldrip Award, Merit School of Excellence Awards, and Global Learning Network awards for excellence, equity, and innovation. Her personal awards include Houston ISD Principal of the Year (2020), Excellence in Leadership Award (2021), and the World Affairs Council Educational Leader of the Year Award (2022).

d. Describe the work of the school leader(s), including:

- **the measurable performance expectations for the school leader that are aligned to the mission of the school**
- **how these expectations will shift from school launch in the first year of operation to sustainability in future years**

The executive director and school leader at Energy Institute High School serve as the instructional, cultural, and operational drivers of the campus. Their work is directly aligned to the school’s mission: to provide a rigorous four-year engineering pathway, prepare students for postsecondary success, and cultivate a learning environment grounded in innovation, community engagement, and real-world problem solving. To ensure that leadership performance supports these aims, the board will use a clear, measurable set of expectations to evaluate the executive director as described above and then the executive director will evaluate the school leader using the following domains (many of which will also be part of the executive director evaluation).

Domain	Performance Expectations	Indicators	Growth Phase	Sustainability Phase
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1. Student Achievement Outcomes	Demonstrates measurable improvement in student academic performance aligned to STAAR, NWEA MAP, TEA accountability targets, and CCMR indicators.	<ul style="list-style-type: none"> - STAAR proficiency & growth - NWEA MAP Reading/Math growth - Subgroup performance & Closing the Gaps - CCMR readiness rates 	<ul style="list-style-type: none"> - Demonstrate year-over-year increases in STAAR, MAP, and CCMR - Strengthen RTI, PBL alignment, and engineering pathway coursework - Close subgroup gaps with targeted strategies 	<ul style="list-style-type: none"> - Maintain multi-year high performance on TEA accountability - Ensure sustained CCMR readiness & postsecondary success - Refine long-term academic strategies
2. Instructional Leadership & Teacher Effectiveness	Builds and maintains an effective instructional culture, ensuring high-quality Tier I instruction and meaningful coaching cycles.	<ul style="list-style-type: none"> - Teacher evaluation results - Fidelity to PBL and engineering curriculum - PLC and data-driven instruction quality - Coaching cycles implemented 	<ul style="list-style-type: none"> - Strengthen teacher development cycles - Improve teacher retention & effectiveness ratings - Ensure vertical alignment in engineering pathway 	<ul style="list-style-type: none"> - Maintain stable, high-performing instructional teams - Ensure long-term excellence in teaching and curriculum execution
3. Operational Leadership	Manages campus operations to ensure strong enrollment, program implementation, and compliance.	<ul style="list-style-type: none"> - Enrollment & recruitment metrics - Master schedule effectiveness - Budget, safety, compliance - Staffing and resource allocation 	<ul style="list-style-type: none"> - Maintain or grow enrollment demand - Refine master schedule to support AP, CTE programming, interventions - Improve operational efficiency 	<ul style="list-style-type: none"> - Demonstrate multi-year operational stability - Strategically plan resources for long-term sustainability
4. School Climate & Community Engagement	Fosters a positive school climate and strong family/community partnerships.	<ul style="list-style-type: none"> - Climate/culture survey results - Student behavior & attendance - Parent engagement participation - Community partnerships 	<ul style="list-style-type: none"> - Improve climate survey metrics - Deepen partnerships with universities, industry, and families - Strengthen student-led exhibitions and public showcases 	<ul style="list-style-type: none"> - Maintain strong, consistent climate survey trends - Institutionalize partnerships and exhibitions as signature programs

5. School Action Plan Implementation	Designs and executes an annual School Action Plan with measurable goals aligned to the mission.	<ul style="list-style-type: none"> - Completion of milestones - Evidence of progress monitoring - Adjustments based on data - Documentation submitted to board/operating partner 	<ul style="list-style-type: none"> - Refine plan annually based on data trends - Implement targeted strategies in academics, culture, and operations 	<ul style="list-style-type: none"> - Demonstrate multi-year improvement cycles - Use longitudinal data to guide innovative or strategic shifts
6. Evaluation & Accountability (T-PESS)	Meets established leadership standards using the Texas Principal Evaluation and Support System.	<ul style="list-style-type: none"> - Annual T-PESS score - Board evaluation - Alignment to state leadership standards 	<ul style="list-style-type: none"> - Demonstrate proficiency across T-PESS strands - Use T-PESS results to inform PD and leadership refinement 	<ul style="list-style-type: none"> - Maintain exemplary leadership performance - Ensure systems and structures remain strong beyond individual leadership

Evaluation of the School Leader

The executive director evaluates the school leader annually using the T-PESS framework, supplemented by:

- Student achievement results
- School climate and culture survey data
- Progress toward School Action Plan goals
- Evidence of effective engineering pathway implementation
- Enrollment and recruitment outcomes
- Parent and community engagement measures

The executive director, in close consultation with the organization's board, uses evaluation results to recommend professional development, determine retention decisions, and ensure that leadership remains aligned to the mission of the school.

Phase	Activities	Estimated Timeline	Responsible Parties
1. Goal-Setting & Agreement	<ul style="list-style-type: none"> • Principal reviews campus data (STAAR, MAP, CCMR, climate survey). • Principal drafts annual goals aligned to school mission and TEA accountability. • Board/Executive Director meets with principal to finalize goals and success criteria. 	August – September	Principal, Executive Director, Board (as required)

2. Professional Growth & Evidence Collection	<ul style="list-style-type: none"> • Principal implements strategies aligned to approved goals. • Ongoing collection of evidence such as observation data, action plan progress, instructional leadership artifacts, and climate/culture indicators. • Executive Director conducts routine check-ins and walkthroughs. 	September – January	Principal, Executive Director
3. Mid-Year Review Conference	<ul style="list-style-type: none"> • Formal review of progress toward stated goals. • Analysis of midpoint academic data (interims, MAP, early CCMR indicators). • Adjustments made to strategies or supports if needed. • Growth plans initiated if progress is off-track. 	January – February	Principal, Executive Director
4. Continued Implementation & Monitoring	<ul style="list-style-type: none"> • Principal continues executing the School Action Plan. • Executive Director continues evidence collection, feedback cycles, and documentation. • Stakeholder surveys administered (climate and culture). 	February – April	Principal, Executive Director
5. End-of-Year Evidence Compilation	<ul style="list-style-type: none"> • Principal submits end-of-year evidence for all goals. • Executive Director reviews student outcome data, CCMR performance, climate survey results, and operational indicators. 	April – May	Principal, Executive Director
6. Summative Evaluation Conference	<ul style="list-style-type: none"> • Principal and Executive Director meet to review the full T-PESS rubric and rating recommendations. • Summative evaluation form completed. • Recommendations for next year's goals and professional development outlined. 	May – June	Principal, Executive Director
7. Board Review & Contract Decision	<ul style="list-style-type: none"> • Board receives the summative evaluation. • Board may consider performance in contract renewal decisions (including non-renewal in cases of persistent underperformance). 	June	Board of Directors

Staffing Plans

10. Provide the following:

a. As [Attachment 8](#), a recruitment and hiring strategy for all campus roles, including:

- selection criteria that demonstrate high standards and mission alignment for all candidates
- a hiring protocol, and timeline that ensure the school is fully staffed by July 1 of each year.

Attachment 8 included? ☐ YES ☐ NO

b. As [Attachment 9](#), a plan to develop staff and retain high-performing staff, including:

- an induction program that will prepare teachers to deliver any unique or particularly challenging aspects of the educational program
- evaluation tools and processes that will capture trends and track and promote teacher progress over time
- The process for providing targeted and personalized support for school staff that includes:
- The allocation of resources to support and provide professional development
- The qualifications of personnel to provide professional development and facilitate adult learning
- Professional development methods and calendar

Attachment 9 included? ☐ YES ☐ NO

c. Describe your process for identifying and remedying unsatisfactory leadership and/or teacher performance:

Energy Institute High School will implement a clear, proactive, and accountability-driven process for identifying and addressing unsatisfactory performance among both school leaders and teachers. All evaluators will use Texas' state-approved systems to ensure consistency, fairness, and alignment to high expectations.

Leadership Evaluation and Support

The Executive Director will directly evaluate the Principal using a state-approved system such as the T-PESS rubric, which provides a comprehensive assessment of instructional leadership, culture building, strategic operations, and student outcomes. The Principal will receive ongoing coaching and support through regular check-ins, mid-cycle progress reviews, and targeted feedback grounded in performance evidence. The Principal, in turn, will evaluate Assistant Principals using the same framework. Assistant Principals will receive frequent walkthrough feedback, coaching conversations, and opportunities for targeted leadership development to ensure alignment to campus priorities and effective support of teachers.

Teacher Evaluation and Support

The Principal and Assistant Principals will evaluate teachers using a state-approved system such as the T-TESS rubric and its aligned coaching and conferencing protocols. Teachers will participate in ongoing instructional walkthroughs, goal-setting conferences, and observation cycles that provide actionable feedback and monitor progress toward professional goals. T-TESS data, student outcomes, and evidence from PLC participation and instructional artifacts will all be used to identify areas of strength and areas where support is needed.

Growth Plans and Remediation

Teachers or leaders who demonstrate unsatisfactory performance will be placed on a formal growth plan. Growth plans will include clear, measurable expectations; targeted coaching; professional development; and defined timelines for improvement.

When appropriate, additional supports such as assigned mentors, instructional coaching cycles, resource materials, or modeling sessions will be provided to accelerate improvement and address specific performance gaps.

Corrective Action and Personnel Decisions

If an individual does not demonstrate sufficient improvement within the established timeline of the growth plan, the school may initiate a formal file-review process. This review may result in further corrective action up to and including non-renewal or dismissal, in accordance with district policy and state law. In the event that a school leader cannot meet performance expectations even after comprehensive support, the Executive Director will remove the individual from the role and open the position. During any transition, existing leadership team members may assume interim responsibilities to maintain stability and continuity of campus operations.

Facilities

11. Provide the following:

- a. Identification of an appropriate proposed school facility OR a plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility that will meet the requirements of the educational program and anticipated student population:**

Facilities for the School are defined as the building and associated grounds known as “Energy Institute High School” in Houston ISD, located at 3501 Southmore Blvd. Houston, TX 77004.

Section 4 – Financial Plan

A strong Financial Plan is coherent overall and aligned internally with the school’s mission and vision, Educational Program, and Organization Plan.

Financial Plan

12. Provide the following:

- a. The staff members responsible for the organization’s finance and a brief description of their qualifications to manage the organization’s systems, policies, and processes:**

The board of directors of Friends of Energy is ultimately responsible for ensuring compliant and responsible financial operation of the school. Members of the board have expertise in financial matters and will be instituting careful policies and procedures that the organization will follow. The organization will also be subject to an annual audit.

The executive director will be primarily responsible for preparing an annual budget for board approval and for implementing the organization’s financial processes. Other organizational staff and consultants will, under the supervision of the executive director and the board of directors, implement the organization’s systems, policies, and practices.

In order to supervise these systems, policies, and practices, the Board reviews and approves the Annual Budget; reviews annual and periodic financial statements and information; designates the Chairperson, Treasurer, and Secretary as the authorized check signers for the organization; assigns the Executive Director check-writing privileges; appoints two members of the Board to be viewers on the accounting system and digital bank account; reviews and approves all non-budgeted expenditures over \$500; reviews and advises on internal controls and accounting policies and procedures; and selects and contracts with an auditor. In accordance with financial controls, expenses under

\$1,000 require one signature and expenses over \$1,000 require two signatures, and no signatory may authorize a check made out to themselves. Pre-signed checks are strictly prohibited.

The Board Treasurer has access to the digital bank account, opens all bank statements, reviews for any irregularities, and completes monthly bank reconciliations; attaches completed bank reconciliations to the applicable bank statement, along with supporting documentation; is primary administrator for overall data entry into accounting system and integrity of accounting system data; reviews and manages cash flows; reviews, revises, and maintains internal accounting controls and procedures; approves inter-account bank transfers; maintains general ledger; prepares monthly and year-end financial reports (balance sheet, income statement, budget versus actual report, and any other requested reports); and explains budget variances.

Under the supervision of the board and executive director, organization staff and consultants develop the organizational budget annually; write and reviews issued checks, except those for which the DevelopmentCoordinator is a payee; monitor program budgets; ensure data entry into accounting system and integrity of accounting system data reviews and approve reimbursements and fund requests; review incoming and outgoing invoices; prepare and file grant submissions; monitor grant reporting and appropriate release of restricted funds; initiate donor thank you letter acknowledgements; manage expenses within the parameters of the approved budget, reporting to the Treasurer and Board on variances and the reason for these variances; and oversee adherence to internal controls.

b. A description of the organization's systems, policies, and processes for:

Financial planning

1. The executive director shall develop for consideration by the governing body at a public meeting a financial plan calculated to accomplish the long-term mission and annual goals and objectives of Friends of Energy in fulfillment of its campus charter and performance contract in accordance with TEC Section 11.174 or successor provisions.

The governing board of Friends of Energy will adopt and follow a budgeting process for operating its charter school that is consistent with its financial plan, board operating procedures and bylaws, and with the requirements set forth in the performance contract or other policy or procedure agreed with the school district under TEC Section 11.174 (or successor provisions).

2. On or before August 31 annually, the executive director shall prepare, or cause to be prepared, a proposed budget covering all estimated revenue and proposed expenditures of the organization for operating its charter school the following fiscal year.

3. The adoption of the budget and any amendments will be made by the governing board in an open meeting in compliance with Chapter 551, Texas Government Code and Texas Education Code Section 12.057, and will be recorded in the minutes of the governing board's meetings. The minutes will include a description of the action taken by the board and a copy of the budget and/or amendments adopted.

4. The governing body of the organization will formally adopt amendments to the budget in accordance with this section.

Accounting

With respect to state and federal funds, Friends of Energy will fully comply with:

1. Generally accepted accounting principles (GAAP); and
2. Applicable federal standards for financial management systems, to the extent federal funds are or may be involved, including the following

- a. Financial reporting. Accurate, current, and complete disclosure of financially assisted activities will be made in accordance with the financial reporting requirements of the grant or sub-grant.
- b. Accounting records. The school will maintain records that adequately identify the source and application of funds provided for activities assisted with federal funds. These records will contain information pertaining to grant or sub-grant awards and authorizations, obligations, unobligated balances, assets, liabilities, outlays or expenditures, and income.
- c. Internal control. The school will maintain effective control and accountability of all federal grant and sub-grant cash, real and personal property, and other assets obtained with federal funds. The school will adequately safeguard all such property and assure that it is used solely for authorized purposes.
- d. Source documentation. Accounting records will be supported by such source documentation as cancelled checks, paid bills, payrolls, time and attendance records, contract and subgrant award documents, etc.
- e. Budget control. The school will compare actual expenditures or outlays of federal funds with budget amounts for each grant or subgrant. Financial information will be related to performance or productivity data, including the development of unit cost information whenever appropriate or specifically required in the grant or subgrant agreement.
- f. Cost Accounting. Applicable federal cost principles, agency program regulations, and the terms of grant and subgrant agreements will be followed in determining the reasonableness, allowability, and allocability of costs.
- g. Cash management. Whenever advance payment procedures are used, the school will follow applicable federal procedures.

Purchasing

It is the procurement policy of the governing body that the executive director will secure the best value for the organization to further the school's mission, goals, and the objectives of its charter and performance contract. Primary considerations in each purchase shall include quality, price, delivery time, past performance, risk and risk management, and additional factors furthering the intended purpose of the procurement.

The executive director or designee will direct the purchase of goods and services as is required and permitted by the budget adopted by the governing body.

Before any purchase order will be issued, a purchase requisition must be completed by the requestor on the form designated by the executive director. In an emergency, the school leader will report the emergency purchase to the executive director the next working day. An emergency is defined as a condition that if not corrected immediately will cause the destruction or waste of school property, endangerment of life or serious bodily injury, or complete cessation of educational activities.

Purchase orders are not required for mileage, personal reimbursements, or travel.

Payroll

With respect to each person providing services at the school, the organization will ascertain whether the person is an employee, contractor or volunteer of the district with which it holds a contract under TEC Section 11.174, or an employee, contractor or volunteer of the organization. The executive director will be responsible for making this ascertainment and keeping appropriate records.

With respect to the district's employees, the organization will provide services, information and communication that will enable the district to meet its obligation to comply with labor laws if, as and when set forth in the performance contract and agreed policies and procedures.

The organization will ensure that its duties and obligations to assist the district in regard to the district's labor law compliance are clearly set forth in the performance contract itself. The executive director will operationalize these duties and obligations in clear, written policies and procedures in consultation with the district.

B. Teacher Retirement System of Texas

1. The organization's employees who qualify for membership in the Teacher Retirement System of Texas (TRS) will be covered under TRS to the same extent a qualified employee of the district is covered.
2. For each employee of the organization covered under TRS, the organization is responsible for making any contribution that otherwise would be the legal responsibility of the district.

C. Employee Expense Reimbursement

The organization's employees are eligible for reimbursement of expenses related to operating its school(s). Pre-authorization is required for significant, one-time expenses such as conference fees, air travel and hotel fees. The executive director or designee approves such expenses, including the executive director's individual reasonable expenses.

1. To obtain reimbursement, employees shall submit an expense report with all documentation within two weeks of incurring the expense. The report and documentation are provided to the direct supervisor, along with an electronic reimbursement form.
2. A late reimbursement request, approved by the executive director or designee, is required for any reimbursement request submitted more than 30 days after the expense is incurred.
3. State taxes will not be reimbursed for tax-exempt expenses. Employees must use the proper tax-exempt forms to avoid paying non-reimbursable taxes.
4. The executive director or designee shall approve all expense reports. In the case of the executive director's individual expense report, the executive director will document all expense reimbursements and may approve them if they are consistent with the approved budget up to \$20,000.00 annually. Any additional expenses from the executive director may be approved by the chair of the board or by the full board.
5. The reimbursement process is as follows:
 - a. All business expenses, except mileage and tips, must be supported with vendor invoices/receipts. Credit card charge slips must include detail(s) about the purchase. The last four digits of the credit card must be visible on the receipt.
 - b. Scanned or photocopies of receipts are an acceptable form of support provided that the original receipt is maintained by the employee for four years.
 - c. For all lost receipts greater than or equal to \$100.00, an affidavit is to be filled out, signed and submitted with the expense report. Lost receipts less than \$25 do not require an affidavit. Affidavits should be submitted at the time the expense report is submitted.
 - d. Expenditures from a previous fiscal year must be submitted no later than July 31 of the new fiscal year, or risk not being reimbursed.

e. Employees submit reimbursements through the electronic reimbursement system. Designated managers are authorized to review and approve expenses. The contracted accountant authorizes electronic payments for approved expense reports.

D. Eligible Travel Expenses

Travel expenses that are eligible for reimbursement include air travel, baggage fees, lodging, personal vehicle mileage, parking, rental cars and meals for necessary business travel.

Air travel should be booked at coach class or the lowest commercial discount fare at the time when the ticket is purchased.

Lodging expenses are reimbursed at reasonable, single occupancy or standard business room rates.

Personal vehicle mileage is reimbursed at current federal rates published by the IRS. Meals are reimbursed only for overnight stays required for business purposes.

Travel expenses are reasonable if within reimbursement rates published by the General Services Administration. Employees may submit a written rationale if an expense exceeds the GSA rates, but the executive director or designee must approve this rationale.

Travel outside of a local area must be pre-approved by the direct supervisor, or as directed by the executive director.

c. A description of the organization's internal controls, financial reporting requirements, and process for conducting independent annual financial and administrative audits

Internal Controls

The board of directors approves fiscal policies and is required to review the document when any substantial changes develop. The directors are aware of staff designated to execute the fiscal procedures.

- i. The Executive Director, working with staff and consultants when appropriate, develops the fiscal policies and procedures.
- ii. The board of directors can change a fiscal policy.

The fiscal year of this organization shall begin on July 1 and end on June 30. An audit of the books and records of Friends of Energy shall be conducted annually by 60 days following the end of the fiscal year. The audit report shall be presented to the board of directors within thirty (30) days of its completion.

All income to the Friends of Energy must be documented and deposited within one week of receipt. In extenuating circumstances, the Treasurer can extend that deadline with approval by the Chairperson.

Cash Receipts - Upon receipt of incoming checks, the organization endorses them "for deposit only" and deposits within 5 business days. A copy of the check, deposit confirmation, and the account allocation for each deposit is filed on the shared drive by date and a copy is sent to the Treasurer to attach to the bank statement. All cash received is immediately counted, verified by the Treasurer or other available board member and immediately posted using the appropriate account allocation. A receipt will be given to the paying party and a copy kept for internal purposes. The cash shall be deposited within 24 hours.

Reimbursements for all expenses shall be submitted to the Treasurer within thirty days of the incurred expense. A receipt must accompany all reimbursements and a Friends of Energy check request form. TDesignated employee(s) review all

requests for payment; verify expenditure and amount is in accordance with budget; provide or verify appropriate allocation information; print checks according to allocation and payment date; and file backup documentation.

The Chairperson, Treasurer, and Secretary will have check signing privileges. The executive director will have check writing privileges. Expenses under \$1000 require one signature, and expenses over \$1,000 require two signatures. No signatory may sign off on any check to his or herself. There shall be no pre-signed checks.

Bank debit cards are to remain in the possession of the Treasurer and Chairperson and all charges made to the debit card must be pre-approved by the Treasurer. All charges greater than \$1,000 must be approved by the Treasurer and the Chairperson.

Financial Reporting Requirements

Friends of Energy will comply with all reporting requirements for the funds it controls.

Independent Annual Financial Audit Procedures

The organization will have the financial and programmatic operations of its charter school audited annually by a certified public accountant, licensed by the Texas State Board of Public Accountancy, and registered as a provider of public accounting services.

1. The organization will file a copy of the annual audit report, approved by the governing body of the organization, with the district not later than the 150th day after the end of the fiscal year for which the audit was made, as agreed with the district.
2. The audit will comply with Generally Accepted Auditing Standards and will include an audit of the accuracy of the fiscal information provided by the organization through the Public Education Information Management System (PEIMS).
3. Financial statements in the audit will comply with Government Auditing Standards and with the Office of Management and Budget Circular A-133 or its successor, if applicable.
4. The report will also include a certificate of the governing body which will include original signatures from the presiding officer and the secretary of the governing body of the organization. The certificate will indicate if the governing body approved or disapproved the contents of the financial and compliance report along with the date of its approval or disapproval. This approval or disapproval will be supported in the minutes of the board's meeting. If the board does not approve the report it will still file it with TEA and include a detailed statement discussing the reasons for disapproval.

Other Items

—For the management and operation of the charter school it operates in the school district, the organization will use the account code structure in use by the district unless otherwise specified in the performance contract or other policies or procedures agreed with the district.

—As and if set forth in the performance contract, or other policies or procedures agreed with the district, the organization will provide services, information and communication necessary for the district to meet its obligation to comply with federal grant requirements. In addition, if the organization itself directly receives federal grants in its own right, it will comply with all federal grant requirements.

1. As and if set forth in the performance contract, or other policies or procedures agreed with the district, the organization will consult the applicable cost principles of federal grants identified by the district to determine which costs are allowable prior to expending funds.
2. The organization will ensure that the scope of its duties and obligations to assist the district in regarding federal grant compliance are clearly set forth in the performance contract itself. The executive director will

operationalize these duties and obligations in clear, written policies and procedures in consultation with the district.

–Business activities of Friends of Energy that are not directly related to the management and operation of its charter school(s) will be kept in separate and distinct accounting, auditing, budgeting, reporting, and record keeping systems from those recording the business activities of that charter school.

–The organization will provide services, information, and communication as necessary for a school district to meet its obligation to comply with applicable state fiscal compliance requirements.

The organization will ensure that the scope of its duties and obligations to assist the district in this regard are clearly set forth in a performance contract with a district. The executive director will operationalize these duties and obligations in clear, written policies and procedures in consultation with the district.

–Friends of Energy shall keep correct books and records of accounts, records of attendance, and the minutes of the proceedings of the board of directors and advisory committee meetings. Friends of Energy shall keep an accurate record of names, addresses, and email addresses of the board of directors and advisory committee members.

–Accounting records are kept for the periods set forth below. Documents that are not permanently retained will be shredded after the retention period.

Document	Retention Period
Accounts Payable Ledgers and Schedules	7 years
Accounts Receivable Ledgers and Schedules	7 years
Audit Reports of Accountants	Permanently
Bank Statements	7 years
Cash Books	7 years
Checks (canceled, w/ exception below)	7 years
Checks (canceled, for important <u>payments</u> ; i.e. taxes, purchase of property, special contracts, etc. [checks should be filed with the papers pertaining to the underlying transaction])	Permanently
Contracts and Leases (expired)	7 years
Contracts and Leases still in effect	Permanently
Correspondence, general	4 years
Correspondence (legal and important matters)	Permanently
Employee Personnel Records (after termination)	7 years
Employment Applications	3 years
Financial Statements (end-of-year)	Permanently
General Ledgers and end-of-year statements	Permanently
Insurance Policies (expired)	Permanently
Insurance records, current accident reports, claims, policies, etc.	Permanently
Internal reports, misc.	3 years
Invoices from vendors	7 years
Minute books of Board of Directors, including Bylaws and Articles of Incorporation	Permanently
Payroll records and summaries, including payments to pensioners	7 years
Tax returns and worksheets, revenue agents' reports and other documents relating to determination of tax liability	Permanently
Time sheets and cards (hourly employees)	7 years

d. The roles and responsibilities among the administration and governing board regarding school finance:

As described above, the governing board is ultimately responsible for adopting the school's budget and ensuring compliance with financial procedures. The administration, led by the executive director, will implement these procedures effectively.

e. How the organization ensures financial transparency, including:

- plans for adoption of the school's budget in a meeting held in compliance with the Texas Open Meetings Act
- public dissemination of its annual audit and an annual report

The organization will ensure financial transparency by annually adopting its budget in a meeting held in compliance with the Texas Open Meetings Act.

In addition, as described above, the organization will file its annual audit with the district. In addition, it will post it publicly on its website.

e. As [Attachment 10](#), an operating budget and narrative that explains revenue and cost assumptions, including:

- grant/fundraising assumptions
- the amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable)
- the projected cost to implement the academic model described in this application

[Attachment 10](#) included? ☒ YES ☐ NO

f. Describe the organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated:

To address situations where anticipated revenues are not received or fall short of estimates, the organization has a contingency plan in place to ensure financial stability and the continued delivery of essential educational services. This plan typically includes closely monitoring revenue streams throughout the fiscal year and promptly identifying any significant variances from budgeted projections. In the event of a shortfall, Friends of Energy may implement measures such as restricting non-essential expenditures. These strategies ensure that the organization can respond proactively to financial challenges, maintain compliance with legal and regulatory requirements, and uphold its commitment to students and stakeholders even during periods of fiscal uncertainty.

Section 5 – Existing Partner/Experienced Partner Supplement

A strong proposal from a partner that has previously operated schools (including partners that operate under a Charter Management Organization or CMO), or a partner proposing to contract with an entity that has previously operated schools (often referred to as an Education Service Provider or ESP), is coherent overall and aligned internally with the school's mission and vision, Educational Program, Operational Plan, Financial Plan, and any other applicable attachments.

- *Existing Partners (any organization that has previously operated schools) should complete only Question 13*
- *Any applicant proposing to contract with an Education Service Provider (ESP) or CMO (Charter Management Organization) should complete Questions 14 and 15*

Existing Partner Track Record

13. Provide the following:

- a. *As Supplemental Attachment 1, the experienced partner applicant, CMO, or ESP's success in serving populations similar to the population that the applicant intends to serve, including evidence of academic*

success and successful management of non-academic school functions (e.g., back-office services, school operations, extracurricular programs)

Supplemental Attachment 1 included? ☐ YES ☐ NO

- b. As *Supplemental Attachment 2*, an independent financial audit report and its most recent annual report of the experienced partner applicant, CMO, or ESP that demonstrated the financial health of the organization.

Supplemental Attachment 2 included? ☐ YES ☐ NO

- c. A description of any history of charter revocations, non-renewals, withdrawals, or failures to open for the experienced partner applicant, CMO, or ESP:

Click or tap here to enter text.

- d. If applying to manage a turnaround campus, evidence that:

- the partner organization has been in existence for at least three years prior to the undertaking of the management of the district campus
- the partner organization has managed multiple campuses for multiple years
- the partner organization has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses

Click or tap here to enter text.

- b. A description of the organization's systems, policies, and processes for:

- Financial planning
- Accounting
- Purchasing
- Payroll

Click or tap here to enter text.

- c. A description of the organization's internal controls, financial reporting requirements, and process for conducting independent annual financial and administrative audits

Click or tap here to enter text.

- d. The roles and responsibilities among the administration and governing board regarding school finance:

Click or tap here to enter text.

- e. How the organization ensures financial transparency, including:

- plans for public adoption of the school's budget
- public dissemination of its annual audit and an annual report

Click or tap here to enter text.

e. As *Attachment 10*, an operating budget and narrative that explains revenue and cost assumptions, including:

- grant/fundraising assumptions
- the amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable)
- the projected cost to implement the academic model described in this application

Attachment 10 included? ☐ YES ☐ NO

f. Describe the organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated:

Click or tap here to enter text.



ENERGY INSTITUTE

Graduation Requirements

Energy students will follow the Distinguished Level of Achievement graduation plan with endorsements. All Energy students will work towards the STEM and Multi-Disciplinary endorsements. Students also have the option of earning the Arts & Humanities endorsement.

Subject	Distinguished Level of Achievement with Endorsements*	Credits
English	English I English II English III English IV	4.0
Math	Algebra 1 Geometry Algebra 2 Pre-Cal or other approved math	4.0
Science	Biology Physics Chemistry Fourth science (approved)	4.0
Social Studies	World Geography World History US History US Government(.5) /Economics (.5)	4.0
World Languages	Any two levels in the same language	2.0
Physical Education	PE	1.0
Health Education	Health	0.5
Fine Arts	Art 1 or approved fine arts credit	1.0
Electives	Approved electives	5.5
Total Credits		26

The banner features a photograph of a modern building with a curved orange facade and a glass-enclosed entrance. To the right of the photo is a large green diagonal graphic element. The text "ENERGY INSTITUTE" is displayed in large, bold, white capital letters on a blue background.

ENERGY INSTITUTE

Enrollment Documents

Table of Content

The following are the policies that we will initially use at the school. The Special Programs and Innovative Magnets policy includes a lottery process.

- I. [Enrollment Policy](#)
- II. [Magnet Transfers](#)
- III. [Admissions Intradistrict Transfers](#)
- IV. [Special Programs and Innovative Magnets](#)

**Persons Age 21
and Over**

An approved dropout recovery program in the District shall admit a person who is at least age 21 and under age 26 for the purpose of completing the requirements for a high school diploma provided that:

1. The student is a District resident;
2. The student may reasonably be expected to complete all requirements for high school graduation prior to his or her 26th birthday; and
3. Space is available in the program.

Registration Forms

Before a student may officially be admitted to District schools, the student's parent, legal guardian, or other person having lawful control shall annually complete and sign registration forms. A student who has reached age 18 shall be permitted to complete and sign these forms.

Proof of Residency

In accordance with administrative regulations, the parent, guardian, or other person having lawful control of the student under order of a court shall present proof of residence in the District in the form of one or more of the following:

1. A recently paid rent receipt.
2. A current lease agreement.
3. The most recent tax receipt indicating home ownership.
4. A current utility bill indicating the address and the adult's name.

For a student living separate and apart from his or her parent, guardian, or other person having lawful control under a court order, the adult District resident with whom the student resides must provide proof of residence in the same manner as described in this policy.

For a nonresident student whose resident grandparent provides a substantial amount of after-school care, the grandparent must provide proof of residence in the same manner as a parent and as described in this policy.

**Verification of
Residence
Information**

District staff in charge of enrollment procedures may require additional documentation when a student's residence status is in question. The Superintendent or designee may verify a student's residence information by:

1. Requiring additional mail addressed to the person enrolling the student;

ADMISSIONS

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(LOCAL)

2. Visually inspecting the residence for evidence that the student indeed lives there; or
3. Applying the criteria outlined in the UIL Constitution and Contest Rules.

Exceptions

Proof of a student's residency shall be waived when the student is homeless as defined by law.

Minor Living Apart

Person Standing in
Parental Relation

A minor student residing in the District but whose parent, guardian, or other person having lawful control under a court order does not reside in the District shall present a power of attorney or an authorization agreement as provided in Chapter 34 of the Family Code assigning responsibility for the student in all school-related matters to an adult resident of the District.

Misconduct

A minor student living apart who has engaged in misconduct that results in any of the consequences found in Education Code 25.001(d) shall not be permitted to attend a District school.

Exceptions

Based on an individual student's circumstance, the Superintendent shall have authority to grant exceptions to the requirement for a power of attorney or authorization agreement and to the exclusion for misconduct.

Extracurricular
Activities

The Superintendent or designee shall determine whether a minor student living apart is present in the District for the primary purpose of participating in extracurricular activities.

**Students not
Enrolled**

A student enrolled in a private school, including a homeschool, shall not be eligible for concurrent enrollment in the District nor for participation in curricular or extracurricular activities. [See EEL and FM]

**Nonresident Student
in Grandparent's
After-School Care**

The parent and grandparent of a nonresident student requesting admission under Education Code 25.001(b)(9) shall provide to the Superintendent the required information on the grandparent's residency and complete a form provided by the District describing the extent of after-school care to be provided by the grandparent.

The Superintendent shall have authority to approve or deny such admissions requests in accordance with this policy.

Substantial After-
School Care

For purposes of this policy, a substantial amount of after-school care shall consist of at least:

1. Two hours after the regular school day; and
2. Four days during the regular school week.

The age of the student and any special needs or circumstances shall also be considered. The student may continue in enrollment as long as the grandparent provides this level of care.

Placement

Accredited Schools

The parent, guardian, or other person having lawful control of a student enrolling in a District school from an accredited public, private, or parochial school shall provide evidence of the prior schooling outside the District. The student shall be placed initially at the grade level reached elsewhere, pending observation by the classroom teacher, guidance personnel, and the principal. On the basis of these observations and results of tests that may be administered by appropriate District personnel, the principal shall determine the final grade placement.

For the purposes of this policy, "accredited" shall be defined as accreditation by TEA, an equivalent agency from another state, or an accrediting association recognized by the commissioner.

**Nonaccredited
Schools**

A student enrolling in a District school from a nonaccredited public, private, or parochial school, including a homeschool, shall be placed initially at the discretion of the principal, pending observation by classroom teachers, guidance personnel, and the principal. Criteria for placement may include:

1. Scores on achievement tests, which may be administered by appropriate District personnel.
2. Recommendation of the sending school.
3. Prior academic record.
4. Chronological age and social and emotional development of the student.
5. Other criteria deemed appropriate by the principal.

Transfer Credit

Before granting course credit, the District shall validate, by testing or other evidence, that any course taken by a student at a nonaccredited public, private, or parochial school meets State Board requirements. [See EHDB]

Foreign Students

A student from a foreign country whose transcripts cannot be accurately evaluated or for whom no transcript can be obtained shall be referred immediately for grade placement testing to determine in which grade level he or she shall be enrolled. The student may be assigned to the grade level he or she has requested until the student's test results are available.

**Transition
Assistance**

In accordance with law, when a student who is identified as homeless or in substitute care enrolls in the District, the District shall assess the student's available records and other relevant information

to ensure credit, including proportionate credit, is awarded appropriately for all subjects and courses taken prior to enrollment.

[See EI]

Withdrawal

A parent or guardian wishing to withdraw a minor student shall present a signed request stating the reason for the withdrawal. A student who is 18 or older may request withdrawal without a parent's or guardian's signature.

[For District withdrawal of students no longer in attendance, see FEA(LOCAL)]

ADMISSIONS
INTERDISTRICT TRANSFERS

FDA
(LOCAL)

AUTHORITY	The Superintendent is authorized to accept or reject any transfer requests, provided that such action is without regard to age, race, color, ancestry, national origin, sex, handicap or disability, marital status, religion, veteran status, political affiliation, sexual orientation, gender identity, and/or gender expression.
CHANGE IN RESIDENCE	Resident students who become nonresidents during the course of a semester shall be permitted to continue in attendance for the remainder of the semester only with an approved out-of-District transfer. A new out-of-District transfer must be completed for the following semester/school year, subject to any applicable restrictions related to program and space availability.
TRANSFER REQUESTS	A nonresident student wishing to transfer into the District shall file an application for transfer by October 1 of each school year with the Superintendent or designee. Nonresident transfer status will be granted on a tuition-free basis, one year at a time, on the factors outlined below, provided the student qualifies for state funding. This deadline shall not apply to external contract charter school programs with space available.
NONRESIDENT EMPLOYEES	A nonresident employee shall benefit as if he or she was an in-District resident and shall be permitted to enroll his or her out-of-District child in any District school following the same practices as in-District students. Once a transfer is approved, and as long as the student is continuously enrolled, the student shall be allowed to complete his or her academic program at that particular school. [See FDB(LOCAL)]
MAGNET AND SPECIALTY PROGRAMS	<p>Out-of-District transfers may be accepted into secondary separate and unique school (SUS) magnet programs or to early college high schools and other specialty schools on campuses that do not have an attendance zone, provided no resident or employee has been denied acceptance due to lack of space.</p> <p>Other out-of-District transfers to magnet programs or other District schools shall be considered on a case-by-case basis by the Superintendent. A student granted such a transfer shall be permitted to complete the program at the school to which the transfer was granted, provided he or she completes the official approval process and, if in a magnet program, continues to meet the requirements of the magnet school program on an annual basis. [See FDB(LOCAL)]</p>
EXCEPTIONS	In extenuating circumstances, the Superintendent may approve out-of-District tuition transfers to SUS magnet programs, early college high schools, and specialty programs on a case-by-case basis for students. When exceptions are granted by the Superintendent, tuition shall be charged.

ADMISSIONS
INTERDISTRICT TRANSFERS

FDA
(LOCAL)

	<p>Students accepted to these programs prior to June 10, 2008, shall be permitted to complete the program, on a tuition basis, at the school to which the transfer was granted, provided they annually complete the official approval process and, if in a magnet program, continue to meet the requirements of that magnet school program on an annual basis.</p>
EXTERNAL CONTACT	<p>A nonresident student wishing to transfer into an external contract charter school may do so on a tuition-free basis provided that all in-District qualifying students have been enrolled.</p>
FACTORS	<p>In approving transfers, the Superintendent or designee shall consider availability of space and instructional staff, the student's disciplinary history, and attendance records. Qualified nonresident students, including the nonresident children of employees who live outside the boundaries of the District, may not be approved for admission to a school on a transfer if any qualified resident student's transfer has been denied during the current school year.</p>
TRANSFER AGREEMENTS	<p>A transfer student shall be notified in the written transfer agreement that he or she must follow all rules and regulations of the District. Violation of the terms of the agreement may result in a transfer request not being approved the following year; however, a transfer may not be revoked during the school year for which the transfer is approved.</p>
TUITION	<p>The Board shall establish tuition rates based on state guidelines and shall charge and collect tuition within prescribed limits for students ineligible for ADA funding.</p>
WAIVERS	<p>The Board may waive tuition for a student based on financial hardship upon written application by the student, parent, or guardian. [See FP]</p>
NONPAYMENT	<p>The District may initiate withdrawal of students whose tuition payments are delinquent.</p>
APPEALS	<p>Any appeals shall be made in accordance with FNG(LOCAL) and GF(LOCAL), as appropriate.</p>
EFFECTIVE DATE	<p>This policy shall be effective as of the adoption date, January 16, 2015.</p>

ADMISSIONS
INTERDISTRICT TRANSFERS

FDA2
(REGULATION)

- | | | |
|--|----|--|
| TRANSFERS:
CHILDREN OF NON-
RESIDENT DISTRICT
EMPLOYEES | 1. | Children of nonresident District employees may attend school within the Houston Independent School District (HISD), on a tuition-free basis, after completing the transfer application process, provided they meet the requirements set forth in Board policy. Nonresident District employees must renew the tuition-free out-of-district transfer each year. See References (a) and (b). |
| DEFINITIONS | 2. | For the purpose of this regulation, the following definitions will apply. |
| CIVIL ACTION 5281,
SECTION A | a. | Section A of the federal court order, Civil Action 5281, requires regulating student transfers between districts. |
| EMPLOYEE | b. | An employee, as defined in the Texas Education Agency (TEA) Student Transfers System (STS), is a person who is employed by the receiving District and currently contributes to the Texas Teacher Retirement System (TRS). Use of this definition qualifies the transfer as an exemption from the requirements of Reference (e). See DEFINITIONS, above. |
| VERIFIABLE
DOCUMENTATION | 3. | The following documentation is required upon application for an out-of-district employee transfer: |
| PHOTO ID | a. | Acceptable identification of the parent includes a valid state-issued driver's license or identification (ID) card or photo ID issued by the District. |
| EMPLOYMENT
VERIFICATION | b. | The employee's most recent pay statement showing contributions to TRS may be used for documentation of employment status, as prescribed by Civil Action 5281. See References (e) and (g). |
| BIRTH CERTIFICATE
AND COURT
DOCUMENTS | c. | The student's birth certificate or court documents indicating guardianship will be used to establish parentage. |
| SOCIAL SECURITY
OR IDENTIFICATION
NUMBER | d. | The student's Social Security card or current Public Education and Information Management System (PEIMS) ID number from school records will be used to ensure that the correct PEIMS ID is entered into the TEA (STS). The STS is an online database system that is available to Student Transfers personnel on the TEA Web site at www.tea.state.tx.us . |
| NEW OUT-OF-
DISTRICT EMPLOYEE
STUDENT TRANSFER | 4. | The procedures for a new out-of-district employee student transfer are as follows. |

ADMISSIONS
INTERDISTRICT TRANSFERS

FDA2
(REGULATION)

APPLICATION

- a. The parent must complete an initial application for an out-of-district transfer and obtain the signature of the receiving school principal indicating the transfer meets the requirements in References (a) and (b) and the guidelines described below.

NONRESIDENT
SCHOOL-BASED
EMPLOYEES

- (1) If the employee works at an HISD school campus, the receiving principal must verify the following information needed to approve a new out-of-district employee student transfer:
- There is space available; and
 - No qualified HISD resident's transfer has been denied for the current school year.

NONMAGNET
TRANSFER

- (a) A nonresident employee who works at a magnet school may enroll his or her child at the school as a nonmagnet student.

MAGNET
TRANSFER

- (b) An out-of-district magnet transfer may be approved to a schoolwide or school within a school (SWAS) magnet campus only if the student qualifies according to magnet guidelines and if space is available after all qualified HISD residents have been accepted. See Reference (d).

NONRESIDENT
DISTRICT
EMPLOYEES
OTHER THAN
SCHOOL-BASED
NONMAGNET
TRANSFER

- (2) If the child of a nonresident, non-school based employee applies for a student transfer, the following guidelines will apply. See References (f), (g), (h), and (i).
- (a) A nonmagnet transfer may be approved by the receiving principal only if the school is on the District's space available list and no qualified HISD resident's transfer has been denied.

MAGNET
TRANSFER

- (b) If the student is applying for a magnet out-of-district transfer, the application is part of the admission process and the transfer may be approved by the receiving principal only if the school is on the District's space available list and no qualified HISD resident's transfer has been denied. Children of nonresident District employees will be given priority over other out-of-district applicants but are subject to the same admission guidelines. A qualifying nonresident child of a nonresident District employee may participate in the magnet program

ADMISSIONS
INTERDISTRICT TRANSFERS

FDA2
(REGULATION)

at a schoolwide magnet campus provided space is available. If the campus has a SWAS magnet program, the student is not a participant in the magnet program. See Reference (d).

Principals may not accept out-of-district employee transfers to a school that uses a lottery for admission or has a waiting list of resident students for the grade level(s) indicated.

SUBMISSION	b.	The parent submits the signed application, the student's birth certificate or court records indicating legal guardianship, and the student's Social Security card or school records with a PEIMS ID number to Student Transfers. Student Transfers personnel make copies of documentation for the files.
TIMELINE	c.	Nonresident District employees may apply for a transfer at any time. Transfers for the following school year may be approved beginning the first Monday of June, provided no qualified HISD resident was denied admission for the current year.
APPROVAL	d.	Student Transfers personnel forward the original out-of-district employee student transfer application and backup information to the general manager, Academic Services for signature approval.
UPDATE DATABASE	e.	Student Transfers personnel enter the required information in the TEA STS.
RENEWAL OF OUT-OF-DISTRICT EMPLOYEE STUDENT TRANSFER	5.	All renewals for out-of-district transfers must be done online. Student Transfers authorizes school personnel access to the HISD Student Transfers Database at the request of principals. Unless revoked through the process described in Reference (b), out-of-district employee transfers and out-of-district employee magnet transfers permit the student to complete his or her academic program at the school to which the transfer was originally granted. The procedures for renewal of an out-of-district employee student transfer are as follows:
ONLINE RENEWAL	a.	In March of each year, school personnel renew student transfers online if the information on the former transfer is still correct and the parent continues to be an employee of the District. If the student's address has changed or the student has transferred to a different HISD school, the steps outlined at OUT-OF-DISTRICT

EMPLOYEE STUDENT TRANSFER, above for new transfers apply.

NOTIFICATION OF APPROVAL	b. Student Transfers personnel will notify the parent and principal through a letter that the transfer has been approved. School principals are responsible for notifying those students whose renewals are denied.
TUITION	6. Children of HISD employees are exempt from paying tuition as long as they complete the appropriate transfer process. Should the parent leave employment with the District during the school year, the parent will be responsible for paying out-of-district tuition. See Reference (d). If the employee leaves the District due to reorganization or a reduction in force, the tuition requirement will be waived for the remainder of the school year. See Reference (g).
EMPLOYMENT VERIFICATION	7. At the end of each semester, Student Transfers staff members verify the employment status of personnel with out-of-district employee student transfers using the PeopleSoft system. In addition, PeopleSoft personnel coordinate with Human Resources to verify continued employment of those parents granted out-of-district employee student transfers.
TRANSPORTATION	8. Children of out-of-district employees who attend HISD schools but who do not reside in a District school attendance zone may be eligible for transportation services to their HISD campuses of attendance. The students may use established District-designated stops on routes with available space to obtain transportation to their campuses of attendance; however, no new stops or routes will be created to accommodate their transportation requests. Transportation services must be requested from the appropriate campus transportation contact person. See Reference (c).
CONSULTATION	9. This regulation has been through consultation (Administrative: September 11, 2007; Instructional: September 6, 2007).
MAINTENANCE RESPONSIBILITY	10. The manager, Student Transfers, is responsible for maintenance of this regulation.

REFERENCES:

- (a) Board Policy FDA(LEGAL)
 - (b) Board Policy FDA(LOCAL)
 - (c) CNA3(REGULATION)
 - (d) EGA(REGULATION)
 - (e) FDA1(REGULATION)
 - (f) Civil Action 5281
 - (g) Elementary School Guidelines
 - (h) Finance Procedures Manual §913 Out-of-District Tuition
 - (i) Secondary School Guidelines
 - (j) Form – Application for Out-of-District Transfer
-

SPECIAL PROGRAMS
INNOVATIVE AND MAGNET PROGRAMS

EHB
(LOCAL)

The District shall provide innovative and engaging programs to attract, retain, and empower students in a rich academic environment, consistent with the Board's adopted vision statement as set forth in AE(LOCAL). The Board commits to inclusion and equality in educational attainment, ownership, and engagement in the District's magnet programs, and the District shall not support patterns of exclusion and inequality.

Definitions

The following definitions are used herein:

1. Community — In this policy is defined as the overall District jurisdictional boundary and may be referred to as the greater Houston area.
2. Magnet School — Defined in this policy, Magnet Schools are unique to Neighborhood Schools with "Themes" in that they seek to draw students from outside the school's attendance zone using specified criteria. These schools receive magnet funding and provide transportation to non-zoned students.
3. Vanguard Magnet — While all District schools have Vanguard programs designed to serve the special needs of G/T students, there are, in addition to the Vanguard programs provided at all District schools, some schools that have a Vanguard Magnet program. There is a separate application for Magnet Vanguard programs. Qualified students can apply and, once accepted, receive transportation.
4. Neighborhood Vanguard Programs/Gifted and Talented (G/T) — Vanguard programs serve G/T identified students in neighborhood schools. Vanguard schools are addressed in separate policies. [See FDB(LOCAL) and EHBB(LOCAL)]
5. Neighborhood School — A school that serves its zoned population of students. A neighborhood school may offer specialized programming and can accept transfers if space is available but does not receive transportation or extra funding from the District.
6. Separate and Unique — A magnet school that does not have a defined attendance zone to the overall District jurisdictional boundary. This magnet school is also referred to as a dedicated or standalone magnet.

**Schools and Types
of Programs**

The magnet program in the District offers students a portfolio of prekindergarten-grade 12 engaging, academically rigorous, and theme-based choices. The program seeks to recruit and draw a socioeconomically and ethnically diverse student body from throughout the District with the ultimate goal of the student population reflecting the diversity of the District's metropolitan community.

SPECIAL PROGRAMS
INNOVATIVE AND MAGNET PROGRAMS

EHB
(LOCAL)

The District's magnet schools and/or programs can be structured in the following ways:

- Elementary school — Application and, when applicable, testing for appropriate program. [See EHBB(LOCAL)]
- Secondary school — May require more specific qualifications for entrance, as identified by magnet theme or unique stand-alone magnet school, and is subject to auditions and/or portfolio for fine art programs. Secondary fine arts programs with auditions and/or portfolios are exempt from lottery process.

**Program
Characteristics**

The District's magnet programs shall develop engaging curricula that meet the learning, wellbeing and civic needs of the District's student population and economic demands of the community. Each magnet program shall identify the following characteristics in the initial proposals as well as maintain the characteristics for evaluation on an ongoing basis:

1. Academic achievement and intellectual entrepreneurship as its core goals, enhanced by thematic programming, teaching philosophies, and real world experiences;
2. An enriched curriculum designed around a specialized theme or philosophy;
3. A socioeconomically and ethnically diverse student body;
4. Increased student access to the program through the District's awareness activities, communication, and transfer procedures in order to meet the magnet enrollment goal of 20 percent (or 100 students per grade level, whichever is less in secondary schools) of the students, who must be from outside the school's attendance zone;
5. Actively involves parent, community, and business partnerships; and
6. Demonstrate school expenditures in support of the program. [See Funding System, below]

**Measures of
Success and
Accountability**

The District shall track and use school performance and hold leadership accountable for results including but not limited to:

- Student academic outcomes aligned with the Board's goals and constraints and/or current accountability standards; and
- Magnet enrollment goal of 20 percent (or 100 students per grade level, whichever is less in secondary schools) of the students, who must be from outside the school's attendance zone.

Funding System

Equal access to instructional excellence requires fair and equitable resources. Board-approved, program funding systems shall be created that take into account program costs, unique themes, and innovation. Board-approved funding shall also be distributed to various magnet programs or themes based on a program or theme's needs via the annual budget allocation process and/or via a rotating capital allocation system. Annually, program funding shall be reviewed by the Board and any changes to the allocations are subject to Board approval as part of the overall budget process. Magnet students are eligible for transportation. [See CNA series]

Establishing a Magnet Program

Schools interested in establishing a magnet program shall submit a written proposal to the Office of School Choice. The proposal shall include the following elements:

- Program specifics;
- Building capacity, which accommodates magnet enrollment of 20 percent (or 100 students per grade level, whichever is less in secondary schools) of the students, who must be from outside the school's attendance zone; and
- Financial sustainability.

The District may identify new programs in alignment to the District strategic plan. The community shall always be involved in the creation, maintenance, and sun-setting of a magnet program. Involvement must include feedback opportunities for families, students, and staff, as well as communication from the District outlining any changes to programming.

Modifying an Existing Magnet Program

A magnet program should have a clear focus and be sustainable across many years as a recognizable brand for the campus. Major modifications that substantially change a program, such as impacting funding or changing theme, require Board approval and may not take effect until the following academic year.

Continued improvement should be an ongoing mindset and shall naturally require frequent, minor changes to programs. Community meetings must be offered to gather input and suggestions from the magnet school's community at the beginning and end of each school year. The community's input and suggestions shall be reviewed and retained by the school.

The Superintendent may make a minor modification to a magnet program in a school designated as a New Education System (NES) school in order to provide coherence or alignment with the instructional/academic program and goals. In the case of modification of a magnet program, the Superintendent shall attempt to accommo-

date and preserve as much of the existing magnet program as possible.

A major modification to a magnet program means a change that undermines the integrity of the magnet program; any other change is a minor modification. Integrity is defined as the clear presence of and adherence to the established magnet theme, as evidenced through course offerings and additional programming. A major modification to a magnet program, whether in a school designated as an NES school or otherwise, is a "significant change" to a magnet program subject to AE(LOCAL) Superintendent Constraint 3.

**Sun-Setting a
Magnet Program**

The District shall track and monitor school performance and hold school leadership accountable for results. The standards referenced herein, as well as the criteria outlined in the proposal, must be maintained for a magnet program to retain its status, funding, and transportation. Changes in status shall require a transparent review process with a clear timeline for implementation prior to the student application process.

**Student Application,
Selection, and
Admission Process**

Qualifications for entering a magnet program are specific to each program and consistent by magnet theme. Entrance to elementary programs is based on available space. The entrance criteria and process shall be transparent, made readily available and easily accessible to the public with the key elements of objectivity, impartiality, fairness, and equity while complying with state and federal laws.

When there are more qualified applicants than space available, a school-specific lottery shall be used to select students.

The District shall operate a database to implement a Districtwide application process and track acceptance of students to individual programs.

[Reference: U.S. Department of Education, Office of Innovation and Improvement, Innovations in Education: Creating Successful Magnet Schools Programs, Washington, D.C., 2004]



ENERGY INSTITUTE

Student Discipline Policy

Table of Content

The following are the policies we will initially use in order to provide for appropriate and effective strategies to support a safe, orderly school:

- I. Student Code of Conduct
- II. Board Policy FOC (DAEP)
- III. Board Policy FOD (Expulsions)
- IV. Discipline Flowchart
- V. Discipline Matrix

2025–2026

STUDENT CODE OF CONDUCT



Proposed Adoption by the Houston ISD Board of Managers
July 22, 2025 • www.houstonisd.org

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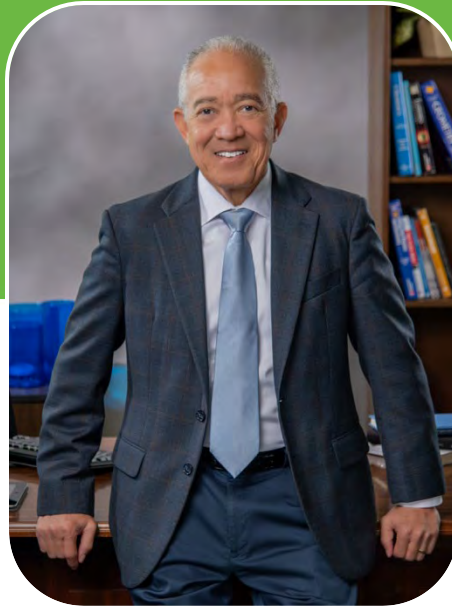
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F. Mike Miles
Houston ISD Superintendent of Schools

This publication, approved by the HISD School Board, carries the full impact of approved Board Policy and Administrative Regulations. Any revisions must be approved by the Board before becoming effective.

STAY INFORMED

HISD Website:

www.HoustonISD.org

HISD NOW:

<https://www.youtube.com/@HISDNOW>

Twitter:

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Facebook:

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Text Messaging:

Text YES to 68453

YouTube:

www.youtube.com/user/TheHISD

It is the policy of the Houston Independent School District not to discriminate on the basis of age, color, handicap or disability, ancestry, national origin, marital status, race, religion, sex, veteran status, political affiliation, sexual orientation, and gender identity and/or gender expression in its educational or employment programs and activities.

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STUDENT CODE OF CONDUCT

Accessibility

If you have difficulty accessing the information in this document because of disability, please contact the HISD Administration Office at 713-556-6000.

Purpose

The Student Code of Conduct (“Code of Conduct”), as required by Chapter 37 of the Texas Education Code, provides methods and options for managing student behavior, preventing and intervening in student discipline problems, and imposing discipline.

The law requires the district to define misconduct that may—or must—result in a range of specific disciplinary consequences, including removal from a regular classroom or campus, out-of-school suspension, placement in a disciplinary alternative education program (DAEP), placement in a juvenile justice alternative education program (JJAEP), or expulsion from school.

This Code of Conduct has been adopted by the Houston ISD School Board and developed with the advice of the district-level committee. It provides information to parents and students regarding standards of conduct, consequences of misconduct, and procedures for administering discipline. This Code of Conduct remains in effect during summer school and at all school-related events and activities outside of the school year until the board adopts an updated version for the next school year.

In accordance with state law, the Code of Conduct shall be posted at each school campus or shall be available for review at the office of the campus principal and the campus disciplinary officers. Additionally, the Code of Conduct shall be posted on the district’s website. Parents shall be notified of any conduct violation that may result in a student being suspended, placed in a DAEP or JJAEP, expelled, or taken into custody by a law enforcement officer under Chapter 37 of the Education Code.

Because the Code of Conduct is adopted by the District’s School Board, it has the force of policy. In the event of a conflict between the Code of Conduct and the Student Handbook, the Code of Conduct shall prevail.

Please Note: The discipline of students with disabilities who are eligible for services under federal law (Individuals with Disabilities Education Act and Section 504 of the Rehabilitation Act of 1973) is subject to the provisions of those laws.

AT A GLANCE: SUMMARY OF RELATED BOARD POLICIES

This Code of Student Conduct is drawn from Board Policies and Administrative Regulations. Students are subject to the Board Policies and Administrative Regulations now in effect and those that may be adopted or amended after the publication of this Code. Those who desire more information concerning the policies and administrative procedures upon which this Code is based should refer to them. Copies are available in all schools. The sections that relate to student conduct are as follows:

Attendance

Board Policy and Administrative Regulations state that regular attendance and punctuality shall be required of every student. Board Policies state the District’s attendance policy for students for course credit. In addition, Texas Education Code Section 25.087 pertains to excused absences. Board Policy Reference(s): FEC, FED, FEA

Complaints

Board Policy states that students may present any complaint to the District, either personally or through a representative, through appropriate complaint procedures. Board Policy Reference(s): FNG, FFH

Student Dress and Personal Grooming

Board Policy describes the District's policy with regard to student dress and personal grooming; it calls for the establishment of standards in each school. Additionally, each school may establish a mandatory uniform policy in conformance with state law and District policy. Board Policy Reference(s): FNCA

Illegal Drugs and Alcohol

Board Policy and state law prohibit any student from selling or possessing an illegal drug or alcohol on school grounds. Board Policy Reference(s): FNF1, FNF2, FNCF

Student Publications

Board Policy describes the District's policies regarding student participation in the publication of school newspapers, yearbooks, literary magazines, and other school-sponsored publications; it also covers the publication and distribution of publications that are not school-sponsored. Board Policy Reference(s): FNAA, FMA

Smoking/Vaping

Board Policy states that students are prohibited from possessing, smoking, or using tobacco products or vaping on school property and at any school-related or school sanctioned activity on or off of school property. Board Policy Reference(s): FNCD

School Property

Board Policy notes that the student's responsibility for school property is the same as his or her responsibility for other public property; it holds the student accountable for malicious damage, the defacing of property, and vandalism. Board Policy Reference(s): FNCB

Information and Privacy Records

Board Policy spells out District policies with regard to the right to information and privacy of student records. In addition, the Texas Public Information Act, Article 6251.17a, and the Family Educational Rights and Privacy Act of 1974, Public Law 93480, describe the student's rights in this regard. Additionally, certain special education records will be destroyed after seven years upon proper notification. Board Policy Reference(s): FL, FL2, FL3

Discipline

Board Policy states that the principal shall have full authority to maintain adequate discipline in the school, and that teachers shall have the responsibility for the discipline of students. Further, it states that students shall be addressed reasonably, fairly, and consistently, but serious or persistent misconduct shall not be tolerated. By Board action, this Code of Student Conduct carries the force of policy in discipline matters. Board Policy Reference(s): FOE, FOD, FOC, FOB, FO, FOF, FNC

Suspension/Expulsion

Board Policy details policies regarding suspensions and expulsions. Board Policy Reference(s): FO, FOD, FFB, FOC, FOA

Hearings

Administrative Regulations establish the guidelines for the format of hearings. Board Policy Reference(s): FOD

Fraternities, Sororities, Gangs, and Other Secret Organizations

Board Policy and state laws disallow fraternities, sororities, and other secret organizations in District schools. Board Policy Reference(s): FNCC, FOC

Search and Seizure

Board Policy details policies regarding search and seizure on campuses. Board Policy Reference(s): FNF, FNF1, FNF2, FNCF

Corporal Punishment

Board Policy details District prohibition of corporal punishment. Board Policy Reference(s): DC11

SCHOOL DISTRICT AUTHORITY AND JURISDICTION

School rules and the district's authority to administer discipline apply whenever the interest of the district is involved, on or off school grounds, in conjunction with or independent of classes and school-sponsored activities.

The district has disciplinary authority over a student:

1. During the regular school day;
2. While the student is traveling on district transportation;
3. During lunch periods in which a student is allowed to leave campus;
4. At any school-related activity, regardless of time or location;
5. For any school-related misconduct, regardless of time or location;
6. When retaliation against a school employee, board member, or volunteer occurs or is threatened, regardless of time or location;
7. When a student engages in cyberbullying, as provided by Education Code 37.0832;
8. When criminal mischief is committed on or off school property or at a school-related event;
9. For certain offenses committed within 300 feet of school property as measured from any point on the school's real property boundary line;
10. For certain offenses committed while on school property or while attending a school-sponsored or school-related activity of another district in Texas;
11. When the student commits a felony, as provided by TEC 37.006 or 37.0081; and
12. When the student is required to register as a sex offender.

Students' Rights and Responsibilities

Title IX of the Education Amendments Act is a federal law that prohibits discrimination on the basis of sex against students and employees of HISD, including sex discrimination, sexual harassment, and other sexual misconduct (such as sexual assault, stalking, and dating or domestic violence) in an educational program or activity. The District shall take all allegations of Title IX violations seriously and will make every reasonable effort to handle and respond to every Title IX complaint filed by students or employees in a prompt, fair, thorough, and equitable manner.

As required by law, the District shall follow the procedures below upon a report of sex-based harassment, including sexual harassment, gender-based harassment, and dating violence, when such allegations, if proved, would meet the definition of sexual harassment under Title IX. Please consult HISD's Title IX website for more information regarding Title IX. Also, questions regarding Title IX may be referred to:

Danielle Delone, *District Title IX Coordinator*

Breanna Turner, *District Title IX Co-Coordinator*

Office Mailing Address:

Hattie Mae White Educational Support Center
4400 West 18th Street
Houston, Texas 77092

Phone: 713.556.6023

Email Address: TitleIXComplaints@houstonisd.org

Threat Assessment and Safe and Supportive School Team

Campus administrators will work closely with the campus threat assessment and safe and supportive school team to implement the district's threat assessment policy and procedures, as required by law, and shall take appropriate disciplinary action in accordance with the Code of Conduct.

Searches

District officials may conduct searches of students, their belongings, and their vehicles in accordance with state and federal law and district policy. Searches of students shall be conducted in a reasonable and nondiscriminatory manner. Refer to the district's policies at FNF(LEGAL) and FNF(LOCAL) for more information regarding investigations and searches.

The district has the right to search a vehicle driven to school by a student and parked on school property whenever there is reasonable suspicion to believe it contains articles or materials prohibited by the district.

Desks, lockers, district-provided technology, and similar items are the property of the district and are provided for student use as a matter of convenience. District property is subject to search or inspection at any time without notice.

Reporting Crimes

The principal and other school administrators as appropriate shall report crimes as required by law and shall call local law enforcement when an administrator suspects a crime has been committed on campus.

Security Personnel

The board utilizes School Based Law Enforcement (SBLE) officers to ensure the security and protection of students, staff, and property. In accordance with law, the board has coordinated with the campus administration and other district employees to ensure appropriate law enforcement duties are assigned to these persons. Provisions addressing the various types of security personnel can be found in the CKE policy series.

“Parent” Defined

Throughout the Code of Conduct and related discipline policies, the term “parent” includes a parent, legal guardian, or other person having lawful control of the child.

Participating in Graduation Activities

The district has the right to limit a student's participation in graduation activities for violating the district's Code of Conduct. Participation might include a speaking role, as established by district policy and procedures.

Students eligible to give the opening and closing remarks at graduation shall be notified by the campus principal. Notwithstanding any other eligibility requirements, to be considered eligible, a student shall not have engaged in any misconduct that resulted in an out-of-school suspension, removal to a DAEP, or expulsion during the semester immediately preceding graduation.

The valedictorian and salutatorian may also have speaking roles at graduation. No student shall be eligible to have such a speaking role if they are engaged in any misconduct that resulted in an out-of-school suspension, removal to a DAEP, or expulsion during the semester immediately preceding graduation.

Only students who are graduating and who hold one of the following positions of honor based on the neutral criteria shall be eligible to use the limited public forum: class officers and the top ten percent. A student who shall otherwise have a speaking role in the graduation ceremony is ineligible to give the opening and closing remarks. Students who are eligible shall be notified and given an opportunity to volunteer. Students are not eligible to volunteer if they were in a disciplinary placement during any part of the spring semester.

The topic of the opening and closing remarks shall be related to the purpose of the graduation ceremony and to the purpose of marking the opening and closing of the event; honoring the occasion, the participants, and those in attendance; bringing the audience to order; and focusing the audience on the purpose of the event. FNA(LOCAL)

Unauthorized Persons

In accordance with Education Code 37.105, a school administrator or district police officer shall have the authority to refuse entry or eject a person from district property if the person refuses to leave peaceably on request and:

1. The person poses a substantial risk of harm to any person; or
2. The person behaves in a manner that is inappropriate for a school setting and persists in the behavior after being given a verbal warning that the behavior is inappropriate and may result in refusal of entry or ejection.

Appeals regarding refusal of entry or ejection from district property may be filed in accordance with policies FNG(LOCAL) or GF(LOCAL), as appropriate. However, the timelines for the district's grievance procedures shall be adjusted as necessary to permit the person to address the board in person within 90 calendar days, unless the complaint is resolved before a board hearing.

See DAEP – Restrictions During Placement for information regarding a student assigned to DAEP at the time of graduation.

STANDARDS FOR STUDENT CONDUCT

Each student is expected to:

- Demonstrate courtesy, even when others do not.
- Behave in a responsible manner.
- Exercise self-discipline.
- Attend all classes regularly and on time.
- Bring appropriate materials and assignments to class.
- Meet district and campus standards of grooming and dress including wearing ID badges.
- Obey all campus and classroom rules.
- Respect the rights and privileges of students, teachers and other district staff and volunteers.
- Respect the property of others, including district property and facilities.
- Cooperate with or assist the school staff in maintaining safety, order and discipline.
- Adhere to the requirements of the Student Code of Conduct.

GENERAL CONDUCT VIOLATIONS

The categories of conduct below are prohibited at school, in vehicles owned or operated by the district, and at all school-related activities, but the list does not include the most severe offenses. In the subsequent sections on **Out-of-School Suspension, DAEP Placement, Placement and/or Expulsion** for Certain Offenses, and Expulsion, those offenses that require or permit specific consequences are listed. Any offense, however, may be severe enough to result in Removal from the Regular Educational Setting as detailed in that section.

Disregard for Authority

Students shall not:

- Fail to comply with directives given by school personnel (insubordination).
- Leave school grounds or school-sponsored events without permission.
- Disobey rules for conduct in district vehicles.
- Refuse to accept discipline or consequence assigned by a teacher, principal, or district administrator.

Mistreatment of Others

Students shall not:

- Use profanity or vulgar language or make obscene gestures.
- Fight or scuffle. (For assault, see **DAEP--Placement and/or Expulsion for Certain Offenses.**)
- Participate in hazing. (See **glossary.**)
- Engage in bullying, cyberbullying, harassment, or making hit lists. (See **glossary** for all four terms.)
- Coerce an individual to act by threat of force.
- Commit extortion or blackmail.
- Threaten a district student, employee, or volunteer including off school property if the conduct causes a substantial disruption to the educational environment.
- Engage in inappropriate verbal, physical, or sexual contact directed toward another person, including a district student, employee, or volunteer.
- Engage in sexual or gender-based harassment or sexual abuse, whether by word, gesture, or any other conduct directed toward another person, including a district student, employee, board member, or volunteer.
- Engage in inappropriate or indecent exposure of private body parts.
- Engage in conduct that constitutes dating violence. (See **glossary.**)
- Record the voice or image of another without the prior consent of the individual being recorded or in any way that disrupts the educational environment or invades the privacy of others.
- Release or threaten to release intimate visual material of a minor or a student who is 18 years of age or older without the student's consent.

Property Offenses

Students shall not:

- Steal from students, staff, or the school.
- Damage or vandalize property owned by others.
(For felony criminal mischief, see **DAEP--Placement and/or Expulsion for Certain Offenses.**)
- Deface or damage school property, including textbooks, technology, electronic resources, lockers, furniture, and other equipment, with graffiti or by other means.
- Commit or assist in a robbery or theft, even if it does not constitute a felony according to the Penal Code. (For felony robbery, aggravated robbery, or theft see **DAEP--Placement and/or Expulsion for Certain Offenses.**)
- Enter, without authorization, district facilities that are not open for operations.

Possession of Prohibited Items

Students shall not possess or use:

- Fireworks of any kind, smoke or stink bombs, or any other pyrotechnic device;
- A razor, box cutter, chain, or any other object used in a way that threatens or inflicts bodily injury to another person;
- A “look-alike” weapon that is intended to be used as a weapon or could reasonably be perceived as a weapon;
- An air gun or BB gun;
- Ammunition;
- A hand instrument designed to cut or stab another by being thrown;
- A firearm silencer or suppressor;
- Knuckles;
- A location-restricted knife:
- A club;
- A firearm;
- A stun gun;
- A pocket knife or any other small knife;
- Mace or pepper spray;
- Pornographic material;
- Tobacco products, cigarettes; e-cigarettes; and any component, part, or accessory for an e-cigarette device;
- Matches or a lighter;
- A laser pointer, unless it is for an approved use; or
- Any articles not generally considered to be weapons, including school supplies, when the principal or designee determines a danger exists.

*For weapons and firearms, see **DAEP-Placement and/or Expulsion for Certain Offenses**. In many circumstances, possession of these items is punishable by mandatory expulsion under federal or state law.

Possession of Telecommunications or other Electronic Devices

Texas House Bill 1481

In accordance with Texas House Bill 1481 and to ensure an academically focused school environment, the use of personal communication devices is prohibited by law on school property during the instructional day.

Instructional day is defined as when the student arrives to school in the morning through the end of the final period.

Personal communication devices, as defined by law, include the following:

- Cell phones
- Tablets
- Smartwatches or wearable communication devices
- Any electronic device capable of digital communication

Students shall not:

- Use phones or other devices for any reason (calls, texts, photos, social media, internet access, etc.) during the instructional day.
- Display or visibly carry phones during the instructional day.
- Use smartwatches or other wearable communication devices during the instructional day.
- Have phones or other devices on school property, visible or audible at any time during the instructional day.

Our expectations are that:

- Students must leave their phones or devices at home or store them, powered off, in their backpacks while on school property during the instructional day.
- Phones and devices must remain out of sight and unused on school property during the instructional day.
- Phones may not be carried in clothing or worn visibly at any time during the instructional day.

If a phone is seen, heard, or used during the instructional day:

1. The device shall be confiscated by staff.
2. Staff will place the device in an envelope and label it clearly with the student's full name, the date and time of confiscation, and the name of the staff member who confiscated the device.
3. Staff or administration will deliver the device to the office for secure storage and retrieval by the parent/guardian.
4. Upon parent/guardian retrieval, the parent will sign a copy of the state law, HISD policy, and confirm receipt of the device.

HISD will not be held responsible for any lost, stolen, or damaged devices confiscated due to the violation of the law and district policy.

Consequences:

- 1st Offense: Parents/guardians may retrieve the phone from the office after school, review, and sign the HISD Personal Communication Devices Policy as it relates to the law.
- 2nd Offense: Parents/guardians may pick up the phone in the office at the end of the following full school day.
- 3rd Offense: Parents/guardians may pick up the phone in the office at the end of two full school days.

Further offenses will result in elevated formal disciplinary action, which includes DAEP placement.

Accommodations:

This prohibition does not apply to the use of devices that are necessary for:

1. Disability-related accommodations under federal law (e.g., IEP or Section 504 plan)
2. A documented need based on a directive from a qualified physician
3. Compliance with health and safety requirements imposed by law or as part of the district's or school's safety protocols

Illegal, Prescription, and Over-the-Counter Drugs

Students shall not:

- Possess, use, give or sell alcohol or an illegal drug. (Also see **DAEP Placement and Expulsion** for mandatory and permissive consequences under state law.)
- Possess or sell seeds or pieces of marijuana in less than a usable amount.
- Possess, use, give, or sell paraphernalia related to any prohibited substance. (See **glossary** for “paraphernalia.”)
- Possess, use, abuse, or sell look-alike drugs or attempt to pass items off as drugs or contraband.
- Abuse the student’s own prescription drug, give a prescription drug to another student, or possess or be under the influence of another person’s prescription drug on school property or at a school related event. (See **glossary** for “abuse.”)
- Abuse over-the-counter drugs. (See **glossary** for “abuse.”)
- Be under the influence of prescription or over-the-counter drugs that cause impairment to the body or mind. (See **glossary** for “under the influence.”)
- Have or take prescription drugs or over-the-counter drugs at school other than as provided by district policy.

Misuse of Technology Resources and the Internet

Students shall not:

- Violate policies, rules, or agreements signed by the student or the student’s parent regarding the use of technology resources.
- Use the internet or other electronic communications to threaten or harass district students, employees, board members, or volunteers, including off school property if the conduct causes a substantial disruption to the educational environment or infringes on the rights of another student at school.
- Send, post, deliver, or possess electronic messages that are abusive, obscene, sexually oriented, threatening, harassing, damaging to another’s reputation, or illegal, including cyberbullying and “sexting,” either on or off school property, if the conduct causes a substantial disruption to the educational environment or infringes on the rights of another student at school.
- Attempt to access or circumvent passwords or other security-related information of the district, students, or employees, or upload or create computer viruses, including off school property if the conduct causes a substantial disruption to the educational environment.
- Attempt to alter, destroy, or disable district technology resources including, but not limited to computers and related equipment, district data, the data of others, or other networks connected to the district’s system, including off school property if the conduct causes a substantial disruption to the educational environment.
- Use the internet or other electronic communication to engage in or encourage illegal behavior or threaten school safety, including off school property if the conduct causes a substantial disruption to the educational environment or infringes on the rights of another student at school.

Safety Transgressions

Students shall not:

- Throw objects that can cause bodily injury or property damage.
- Discharge a fire extinguisher without valid cause.
- Make false accusations or perpetrate hoaxes regarding school safety.
- Engage in any conduct that school officials might reasonably believe will substantially disrupt the school program or incite violence.
- Engage in verbal (oral or written) exchanges that threaten the safety of another student, a school employee, or school property.
- Possess published or electronic material designed to promote or encourage illegal behavior or that could threaten school safety.
- Prop open any secure school doors or bypassing weapon detection systems, including but not limited to exterior doors, emergency exits and temporary building doors.

Miscellaneous Offenses

Students shall not:

- Gamble.
- Falsify records, passes, or other school-related documents.
- Engage in actions or demonstrations that substantially disrupt or materially interfere with school activities.
- Violate dress and grooming standards as communicated in the **Student Handbook and Code of Conduct**.
- Repeatedly violate other communicated campus or classroom standards of behavior.
- Engage in academic dishonesty, which includes cheating or copying the work of another student, plagiarism, and unauthorized communication between students during an examination.

The district may impose campus or classroom rules in addition to those found in the Code of Conduct. These rules may be posted in classrooms or given to the student and may or may not constitute violations of the Code of Conduct.

DISCIPLINE MANAGEMENT TECHNIQUES

Discipline shall be designed to improve conduct and to encourage students to adhere to be responsible members of the school community. Disciplinary action shall draw on the professional judgment of teachers and administrators and on a range of discipline management techniques, including restorative practices. Discipline shall be based on the seriousness of the offense, the student's age and grade level, the frequency of misbehavior, the student's attitude, the effect of the misconduct on the school environment, and statutory requirements.

Techniques

The following discipline management techniques may be used alone, in combination, or as part of progressive interventions for behavior prohibited by the Code of Conduct or by campus or classroom rules:

- Verbal correction, oral or written.
- Cooling-off time or a brief "time-out" period, in accordance with law.
- Seating changes within the classroom or vehicles owned or operated by the district.
- Temporary confiscation of items that disrupt the educational process.
- Rewards or demerits.
- Behavioral contracts.
- Counseling by teachers, school counselors, or administrative personnel.
- Parent-teacher conferences.
- Restorative practices.
- Grade reductions for cheating, plagiarism, and as otherwise permitted by policy.
- Detention, including outside regular school hours. (Before a student under 18 is assigned to detention outside regular school hours, notice shall be given to the student and the parent/guardian should be notified to inform him or her so that transportation arrangements can be planned.)
- Sending the student to the office, other assigned area, or to ISS (In-School Suspension).
- Assignment of school duties, such as cleaning or picking up litter.
- Withdrawal of privileges, such as participation in extracurricular activities, eligibility for seeking and holding honorary offices, or membership in school-sponsored clubs and organizations.
- Penalties identified in individual student organizations' extracurricular standards of behavior.
- Restriction or revocation of district transportation privileges.
- School-assessed and school-administered probation.
- Out-of-school suspension, as specified in the **Out-of-School Suspension** section of this Code.
- Placement in a **DAEP**, as specified in the DAEP section of this Code.
- Expulsion and/or placement in an alternative educational setting, as specified in the **Placement and/or Expulsion for Certain Offenses** section of this Code.
- Expulsion, as specified in the **Expulsion** section of this Code.
- Referral to an outside agency or legal authority for criminal prosecution in addition to disciplinary measures imposed by the district.
- Behavior coaching.
- Anger management classes.
- Mediation (victim-offender).
- Classroom circles.
- Family group conferencing.
- Other strategies and consequences as determined by school officials.

Prohibited Aversive Techniques

Aversive techniques are prohibited for use with students and are defined as techniques or interventions intended to reduce the reoccurrence of a behavior by intentionally inflicting significant physical or emotional discomfort or pain.

Aversive techniques include:

- Using techniques designed or likely to cause physical pain.
- Using techniques designed or likely to cause physical pain by shock or any procedure involving pressure points or joint locks.
- Directed release of noxious, toxic, or unpleasant spray, mist, or substance near a student's face.
- Denying adequate sleep, air, food, water, shelter, bedding, physical comfort, supervision, or access to a restroom facility.
- Ridiculing or demeaning a student in a manner that adversely affects or endangers the learning or mental health of the student or constitutes verbal abuse.
- Employing a device, material, or object that immobilizes all four of a student's extremities, including prone or supine floor restraint.
- Impairing the student's breathing, including applying pressure to the student's torso or neck or placing something in, on, or over the student's mouth or nose or covering the student's face.
- Restricting the student's circulation.
- Securing the student to a stationary object while the student is standing or sitting.
- Inhibiting, reducing, or hindering the student's ability to communicate.
- Using chemical restraints.
- Using time-out in a manner that prevents the student from being able to be involved in and progress appropriately in the required curriculum or any applicable individualized education program (IEP) goals, including isolating the student by the use of physical barriers.
- Depriving the student of one or more of the student's senses, unless the technique does not cause the student discomfort or complies with the student's IEP or behavior intervention plan (BIP).

LISTING OF OFFENSES AND CONSEQUENCES BY LEVEL

Level I Offenses

Level I acts of misconduct include repeated infractions of classroom management procedures or rules or other misconduct that disrupts the educational process. The following is a list of most common types of Level I behavior infractions:

1. Refusing to follow classroom rules.
2. Being tardy to class.
3. Refusing to participate in classroom activities or fulfill assignments.
4. Failing to bring appropriate materials to class.
5. Possessing and/or using nuisance items.
6. Using prohibited electronic device(s).
7. Eating, drinking, or gum chewing in an undesignated area.
8. Disrupting the orderly classroom process.
9. Running, making excessive noise or other disruptions in halls, buildings, classrooms, or other supervised settings.
10. Violating dress code (including not wearing appropriate face coverings or ID badges).
11. Receiving parking violations.

Level I Disciplinary Options

In no rank order, any one or combination will be applied:

1. Teacher/student, counselor/student or administrator/student conference.
2. Parent conference call.
3. In-class disciplinary action or assignment such as, but not limited to: verbal correction, change of seat, rewards or demerits, behavioral contracts, or point deductions using systems for conduct grades.
4. Withdrawal of student privileges.
5. Detention.
6. Confiscation of nuisance items or materials.
7. Confiscation of prohibited items.
8. Supervised campus service assignment.
9. Required correction in attire or appearance.
10. School-assigned period of probation.
11. Restorative practices.

Level II Offenses

When a student's behavior does not change as a result of action taken on Level I and the student is being seen for a second time in the principal's office for repeated Level I infractions, the student is moved to Level II for discipline purposes.

Examples of Level II offenses include, but are not limited to:

1. Disrespect to authority.
2. Failing to comply with directions given by school personnel.

Level II Disciplinary Options

In no rank order, any one or combination will be applied:

1. Any Level I consequence.
2. Saturday School.
3. In-School Suspension.
4. Mandatory Parent/Guardian Conference.

Level III Offenses

Level III acts of misconduct include those student infractions which are somewhat more serious than those in Levels I and II in their effect on the orderly process of the school program. Examples of misconduct include, but are not limited to the following:

1. Cheating or copying the work of another student.
2. Leaving the classroom, school grounds, or school-sponsored events without permission. (Truant)
3. Failure to comply with the personal communication device designated storage method/Using a communication device on school property during the school day.
4. Cutting class or other scheduled activity.
5. Using profane, obscene, indecent, or racially or ethnically offensive language, verbally or written, and/or gestures to other students.
6. Altering school records, documents, or forgery of a name on school documents.
7. Vandalizing or defacing school property.
8. Having excessive absences or tardies.
9. Engaging in acts of inappropriate familiarity with other students.
10. Throwing or irresponsible use of objects that can cause bodily injury or damage to property.
11. Shifting to Level IV Offense Exhibiting any unacceptable or unwanted physical contact whether injury occurs.
12. Driving recklessly in an automobile.
13. Gambling.
14. Possessing, using, or distributing non-alcoholic beers, wines, or other liquors
15. Possessing a soft air gun.
16. Possessing live ammunition.
17. Repeating any Level II offense or having a new violation while being disciplined for a Level II offense.

Level III Disciplinary Options

In no rank order, any one or combination of the following will be applied:

1. Any Level I or Level II consequence.
2. Confiscation of prohibited items.
3. Grade penalty for copying or cheating and/or a written assignment related to offense.
4. Exclusion from extracurricular activities.
5. Restoration and/or restitution as applicable.
6. Referral to law enforcement personnel.
7. In-School Suspension.
8. Out-Of-School Suspension.

Level IV Serious Offenses

Level IV offenses include those acts of misconduct that seriously disrupt the educational process, endanger, or seriously affect other students, or violate the law. Examples include, but are not limited to the following:

1. Any repeated offense of Level III or having a new violation while being disciplined for a Level III offense.
2. Repeated acts of disobedience or disorderly behavior that may cause a disruption in school, endanger, or seriously affect the health and safety of others.
3. Possessing or using tobacco products on school property at any time or while attending an off-campus school related activity.
4. Oral or written threats to do bodily harm to others or to the property of others (harassment).
5. Breaching or bypassing school security measures (opening or propping secured doors)
6. Interfering with school authorities or programs to include boycotts, sit-ins, or trespassing.
7. Fighting is defined as a physical conflict between two or more individuals.
A fight occurs if a student who is attacked strikes back. To avoid penalty, a student under attack should seek to detach himself/herself from the situation and get school personnel.
8. Stealing, robbery, or burglary.
9. Extortion, coercion, or blackmail (Obtaining money, objects, or favors from unwilling person(s).).
10. Using profane, obscene, indecent, immoral, or offensive language and/or gestures directed toward school personnel.
11. Failure to comply with assigned disciplinary consequences.
12. Possessing a device, object, or substance that could cause bodily harm to individuals in any school setting.
13. Failure to report to school personnel the knowledge of an event, device, object, or substance that could cause bodily harm to individuals in any school setting.
14. Possession, use, or distribution of any substance represented to be a drug or alcohol.
15. Possesses or uses an e-cigarette as defined by Section 161.081.
16. Sexual misconduct, and/or sexual harassment.
17. Hazing.
18. Gang-related behavior, attire, activity, or gang membership.
19. Possession of drug paraphernalia.
20. Major vandalism to district property.
21. Posting or distributing unauthorized communicative materials on school premises.
22. Placing or discharging fireworks.
23. Pledges to join, solicit membership in a public school fraternity, sorority, secret society, or gang as defined in TEC 37.121.
24. Possession or distribution of pornographic materials.
25. Distribution of over the counter or prescription medications to other students and/or ingestion of such medications received from other students
26. Criminal trespass.
27. Continuing to engage in serious or persistent misbehavior that violates the code of conduct or DAEP classroom rules after being placed in an alternative education program for disciplinary reasons (Possible Expulsion).
28. Engaging in criminal mischief under Penal Code 28.03, if the conduct is punishable as a felony, whether committed on or off of school property or at a school-related activity, (intentionally or knowingly damage to school property resulting in a loss of \$1,500 or more) (Possible Expulsion).

29. Simple Assault (Class C Assault found Section F of Board Policy).
30. Any unwanted physical contact with injury.
31. Electronically modifying school records.
32. Retaliation against another student.
33. Tampering or falsifying a drug test, screening, or searches.
34. Involvement in a public school fraternity, sorority, or secret society, including participating as a member or pledge, or soliciting another person to become a pledge or member of a public school fraternity, sorority, secret society, or gang.
35. Engaging in bullying that encourages a student to commit or attempt to commit suicide.
36. Inciting violence against a student through group bullying.
37. Releasing or threatening to release intimate visual material of a minor or a student who is 18 years of age or older without the student's consent.

Level IV Disciplinary Options

In no rank order, any one or combination of the following will be applied:

1. Teacher/student, administrator/student, or parent conference call.
2. Restorative practices.
3. Out-of-School Suspension from school, not to exceed three days at a time.
4. Citation by law enforcement personnel.
5. In-School Suspension (includes assignment for students under the age of 10).
6. Reassignment of classes.
7. Disciplinary Alternative Education Program Placement.
8. Mandatory Parent/Guardian Conference.
9. Community service projects.

Level V Mandatory Removal

A student must be placed in a Disciplinary Alternative Education Program (DAEP) if the student:

- Engages in conduct relating to a false alarm or report (including a bomb threat) or a terroristic threat involving a public school. (See **glossary**.)
- Commits the following offenses on school property or within 300 feet of school property as measured from any point on the school's real property boundary line, or while attending a school-sponsored or school-related activity on or off school property:
 - Engages in conduct punishable as a felony.
 - Commits an assault (see **glossary**) under Penal Code 22.01(a) (1).
 - Sells, gives, or delivers to another person or possesses, uses, or is under the influence of a controlled substance, or dangerous drug in an amount not constituting a felony offense. (School-related felony drug offenses are addressed in the Expulsion section of the Code). (See **glossary** for "under the influence" "controlled substance," and "dangerous drug.")
 - Sells, gives, or delivers to another person or possesses, uses, or is under the influence of marijuana or THC. A student with a valid prescription for low-THC cannabis as authorized by Chapter 487 of the Health and Safety Code does not violate this provision.
 - Sells, gives, or delivers to another person an alcoholic beverage; commits a serious act or offense while under the influence of alcohol, or possesses, uses, or is under the influence of alcohol.

- Behaves in a manner that contains the elements of an offense relating to abusable volatile chemicals.
- Sells, gives, or delivers to another person a nicotine delivery system or an e-cigarette.
- Behaves in a manner that contains the elements of the offense of public lewdness or indecent exposure. (See **glossary**)
- Engages in conduct that contains the elements of an offense of harassment against an employee under Penal Code 42.07 (a)(1), (2), (3), or (7).
- Engages in expellable conduct and is six to nine years of age.
- Commits a federal firearms violation and is younger than six years of age.
- Engages in conduct that contains the elements of the offense of retaliation against any school employee or volunteer on or off school property (Committing retaliation in combination with another expellable offense is addressed in the Expulsion section of this Code).
- Engages in conduct punishable as aggravated robbery or a felony listed under Title 5 (see **glossary**) of the Penal Code when the conduct occurs off school property and not at a school-sponsored or school-related event and:
 1. The student receives deferred prosecution (see **glossary**),
 2. A court or jury finds that the student has engaged in delinquent conduct (see **glossary**), or
 3. The superintendent or designee has a reasonable belief (see the **glossary**) that the student engaged in the conduct

Level V Mandatory Expulsion

A student **must** be expelled under federal or state law for any of the following offenses that occur on school property or while attending a school-sponsored or school-related activity on or off school property:

Bringing to school or possessing at school, including any setting that is under the district's control or supervision for the purpose of a school activity, a firearm, as defined by federal law. (See **glossary**).

Note: *Mandatory expulsion under the federal Gun Free Schools Act does not apply to a firearm that is lawfully stored inside a locked vehicle or to firearms used in activities approved and authorized by the district when the district has adopted appropriate safeguards to ensure student safety.*

- Unlawfully carrying on or about the student's person the following, in the manner prohibited by Penal Code 46.02:
- A handgun, defined by state law as any firearm designed, made, or adapted to be used with one hand. (See **glossary**.) Note: A student may not be expelled solely on the basis of the student's use, exhibition, or possession of a firearm that occurs at an approved target range facility that is not located on a school campus; while participating in or preparing for a school-sponsored, shooting competition or a shooting sports activity that is sponsored or supported by the Parks and Wildlife Department; or a shooting sports sanctioning organization working with the department. [See policy FNCG(LEGAL).]
- A location-restricted knife, as defined by state law. (See **glossary**.)
- Possessing, manufacturing, transporting, repairing, or selling a prohibited weapon, as defined in state law. (See **glossary**.)
- Behaving in a manner that contains the elements of the following offenses under the Penal Code:
- Aggravated assault, sexual assault, or aggravated sexual assault.
- Arson. (See **glossary**.)
- Murder, capital murder, or criminal attempt to commit murder or capital murder.
- Indecency with a child.
- Aggravated kidnapping.
- Aggravated robbery.
- Manslaughter.
- Criminally negligent homicide.
- Continuous sexual abuse of a young child or disabled individual.
- Behavior punishable as a felony that involves the selling, giving or delivering to another person, possessing, using, or being under the influence of a controlled substance or a dangerous drug.
- Engaging in retaliation against a school employee or volunteer combined with one of the above listed mandatory expulsion offenses.

Students with Disabilities

The discipline of students with disabilities is subject to applicable state and federal law in addition to the Code of Conduct. In the event of any conflict, the district shall comply with federal law. For more information regarding discipline of students with disabilities, see policy FOF(LEGAL).

In accordance with the Education Code, a student who receives special education services may not be disciplined for conduct meeting the definition of bullying, cyberbullying, harassment, or making hit lists (see **glossary**) until an Admission, Review, and Dismissal (ARD) committee meeting has been held to review the conduct.

In deciding whether to order suspension, DAEP placement, or expulsion, regardless of whether the action is mandatory or discretionary, the district will take into consideration a disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct.

For information regarding students with disabilities, suspension, expulsion, and DAEP, refer to the Notice of Procedural Safeguards, Rights of Parents of Students with Disabilities on our district website, www.houstonisd.org.

Notification

A campus administrator shall promptly notify a student's parent by phone or in person of any violation that may result in in-school or out-of-school suspension, placement in a DAEP, placement in a JJAEP, or expulsion. The administrator shall also notify a student's parent if the student is taken into custody by a law enforcement officer under the disciplinary provisions of the Education Code.

A good faith effort shall be made to provide written notice of the disciplinary action to the student, on the day the action was taken, for delivery to the student's parent. If the parent has not been reached by telephone or in person by 5:00 p.m. of the first business day after the day the disciplinary action was taken, the administrator shall send written notification by U.S. Mail. If the administrator is not able to provide notice to the parent, the principal or designee shall provide the notice.

Before the principal or appropriate administrator assigns a student under 18 to detention outside regular school hours, notice shall be given to the student's parent to inform him or her of the reason for the detention and permit arrangements for necessary transportation.

Parental Involvement

The principal or other appropriate administrator shall notify the parent of or person standing in parental relation to a student who has been placed in a disciplinary alternative education program (DAEP).

Appeals

Questions from parents regarding disciplinary measures should be addressed to the teacher or campus administration as appropriate. Appeals or complaints regarding the use of specific discipline management techniques should be addressed in accordance with policy FOC/FOD (LEGAL). A copy of the policy may be obtained from the principal's office, the central administration office or through Policy Online at the following address: www.houstonisd.org.

The district shall not delay a disciplinary consequence while a student or parent pursues a grievance. In the instance of a student who is accused of conduct that meets the definition of sexual harassment as defined by Title IX, the district will comply with applicable federal law, including the Title IX formal complaint process. See policies FFH(LEGAL) AND (LOCAL).

Removal from the School Bus

A bus driver may refer a student to the transportation director's office or to the campus administration office to maintain effective discipline on the bus. The transportation director or campus administration must employ additional discipline management techniques, as appropriate, which can include restricting or revoking a student's bus riding privileges.

To transport students safely, the vehicle operator must focus on driving and not be distracted by student misbehavior. Therefore, when appropriate disciplinary management techniques fail to improve student behavior or when specific misconduct warrants immediate

removal, the transportation director or campus administrator may restrict or revoke a student's transportation privileges, in accordance with law.

REMOVAL FROM THE REGULAR EDUCATIONAL SETTING

In addition to other discipline management techniques, misconduct may result in removal from the regular educational setting in the form of a routine referral or a formal removal.

Routine Referral

A routine referral occurs when a teacher sends a student to the campus administrator's office as a discipline management technique. The campus administrator shall employ alternative discipline management techniques, including progressive interventions. A teacher or administrator may remove a student from class for behavior that violates this Code of Conduct to maintain effective discipline in the classroom.

Formal Removal

A teacher may also initiate a formal removal from class if:

1. The student's behavior has been documented by the teacher as repeatedly interfering with the teacher's ability to teach the class or with other students' ability to learn; or
2. The behavior is so unruly, disruptive, or abusive toward the teacher, another adult, or another student in the classroom.
3. A student engages in conduct that constitutes bullying, as defined by Education Code 37.0832.0.

Within three school days of the formal removal, the campus administrator shall schedule a conference with the student's parent, the student, the teacher who removed the student from class, and any other appropriate administrator. At the conference, the appropriate administrator shall inform the student of the alleged misconduct and the proposed consequences. The student shall have an opportunity to respond to the allegations.

When a student is removed from the regular classroom by a teacher and a conference is pending, the campus administrator may place the student in:

- Another appropriate classroom.
- In-School Suspension.
- Out-of-school suspension.
- DAEP.

A teacher or administrator must remove a student from class if the student engages in behavior that under the Education Code requires or permits the student to be placed in a DAEP or expelled. When removing for those reasons, the procedures in the subsequent sections on DAEP or expulsion shall be followed.

Returning Student to Classroom

A student who has been formally removed from class by a teacher for conduct against the teacher containing the elements of assault, aggravated assault, sexual assault, or aggravated sexual assault may not be returned to the teacher's class without the teacher's written consent.

A student who has been formally removed by a teacher for any other conduct may not be returned to the teacher's class without the teacher's written consent if the placement review committee determines that the teacher's class is the best or only alternative available, and not later than the third class day after the day the student was removed from class, a conference in which the teacher was provided

an opportunity to participate has been held. The student may not be returned to the teacher's class unless the teacher provides written consent for the student's return or a return to class plan has been prepared for that student.

OUT-OF-SCHOOL SUSPENSION

Misconduct

Students may be suspended for any behavior listed in the Code of Conduct as a general conduct violation, DAEP offense, or expellable offense.

The district shall not use out-of-school suspension for students below grade 3 unless the conduct meets the requirements established in law.

A student below grade 3 or a student who is homeless shall not be placed in out-of-school suspension unless, while on school property or while attending a school-sponsored or school-related activity on or off school property, the student engages in:

- Conduct that contains the elements of a weapons offense, as provided in Penal Code Section 46.02 or 46.05;
- Conduct that threatens the immediate health and safety of other students in the classroom
- Documented conduct that results in repeated or significant disruption to the classroom
- Selling, giving or delivering to another person or possessing, using, or being under the influence of any amount of marijuana, an alcoholic beverage, or a controlled substance or dangerous drugs as defined by federal or state law.

The district shall use a positive behavior program as a disciplinary alternative for students below grade 3 who commit general conduct violations instead of suspension or placement in a DAEP. The program shall meet the requirements of the law.

Process

State law allows a student to be suspended for no more than three school days per behavior violation, with no limit on the number of times a student may be suspended in a semester or school year.

Before being suspended a student shall have an informal conference with the appropriate campus administrator, who shall inform the student of the alleged misconduct and give the student an opportunity to respond to the allegation before the administrator renders a decision.

The campus administrator shall determine the number of days of a student's suspension, not to exceed three school days. In deciding whether to order out-of-school suspension, the administrator shall take into consideration:

1. Self-defense (see **glossary**),
2. Intent or lack of intent at the time the student engaged in the conduct,
3. The student's disciplinary history,
4. A disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct,
5. A student's status in the conservatorship of the Department of Family and Protective Services (foster care) or
6. A student's status as homeless.

The appropriate administrator shall determine any restrictions on participation in school-sponsored or school-related extracurricular and cocurricular activities.

Coursework During Suspension

The district shall ensure a student receives access to coursework for foundation curriculum courses while the student is placed in in-school or out-of-school suspension, including at least one method of receiving this coursework that doesn't require the use of the internet.

A student removed from the regular classroom to in-school suspension or another setting, other than a DAEP, will have an opportunity before the beginning of the next school year to complete each course the student was enrolled in at the time of removal. The district may provide the opportunity by any method available, including a correspondence course, another distance learning option, or summer school. The district will not charge the student for any method of completion provided by the district.

DISCIPLINARY ALTERNATIVE EDUCATION PROGRAM (DAEP) PLACEMENT

The DAEP shall be provided in a setting other than the student's regular classroom. An elementary school student may not be placed in a DAEP with a student that is not in elementary school.

For purposes of DAEP, elementary classification shall be kindergarten – grade 5, secondary classification shall be grades 6 – 8, and high school classification shall be grades 9 -12.

A student who is expelled for an offense that otherwise would have resulted in a DAEP placement does not have to be placed in a DAEP in addition to the expulsion. Removals to a DAEP shall be made by the Office of Student Discipline

Conference

When a student is removed from class for a DAEP offense, the CBC (Campus Behavior Coordinator) or appropriate administrator shall schedule a conference within three school days with the student's parent, the student, and the referring campus. At the conference, the CBC or appropriate administrator shall provide the student:

- Information, orally or in writing, of the reasons for the removal;
- An explanation of the basis for the removal; and
- An opportunity to respond to the reasons for the removal.

Following valid attempts to require attendance, the district may hold the conference and make a placement decision regardless of whether the student or the student's parents attend the conference.

In deciding whether to place a student in a DAEP, regardless of whether the action is mandatory or discretionary, the CBC or appropriate administrator shall take into consideration:

1. Self-defense (see **glossary**),
2. Intent or lack of intent at the time the student engaged in the conduct,
3. The student's disciplinary history,
4. A disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct.
5. A student's status in the conservatorship of the Department of Family and Protective Services (foster care), or
6. A student's status as homeless.

Discretionary Placement: Misconduct That May Result in DAEP Placement

A student may be placed in a DAEP for behaviors prohibited in the General Conduct Violations section of this Code.

Misconduct Identified in State Law

In accordance with state law, a student may be placed in a DAEP for any one of the following offenses:

- Engaging in bullying that encourages a student to commit or attempt to commit suicide.
- Inciting violence against a student through group bullying.
- Releasing or threatening to release intimate visual material of a minor or of a student who is 18 years of age or older without the student's consent.
- Involvement in a public school fraternity, sorority or secret society, including participating as a member or pledge or soliciting another person to become a pledge or member of a public school fraternity, sorority or secret society, or gang. (See **glossary**.)
- Involvement in criminal street gang activity. (See **glossary**.)
- Criminal mischief not punishable as a felony.
- Assault (no bodily injury) with threat of imminent bodily injury.
- Assault by offensive or provocative physical contact.

In accordance with state law, a student **may** be placed in a DAEP if the superintendent or the superintendent's designee has reasonable belief (see **glossary**) that the student has engaged in conduct punishable as a felony that occurs off school property and not at a school-sponsored or school-related event, if the student's presence in the regular classroom threatens the safety of other students or teachers or will be detrimental to the educational process. Aggravated robbery or felonies listed as offenses in Title 5 [see **glossary**] of the penal code are punishable as mandatory expulsions.

The campus CBC or appropriate administrator **may** place a student in a DAEP for off-campus conduct for which DAEP placement is required by state law if the administrator does not have knowledge of the conduct before the first anniversary of the date the conduct occurred.

Mandatory Placement: Misconduct That Requires DAEP Placement

A student **must** be placed in a Disciplinary Alternative Education Program (DAEP) if the student:

- Engages in conduct relating to a false alarm or report (including a bomb threat) or a terroristic threat involving a public school. (See **glossary**.)
- Commits the following offenses on school property or within 300 feet of school property as measured from any point on the school's real property boundary line, or while attending a school-sponsored or school-related activity on or off school property:
- Engages in conduct punishable as a felony.
- Commits an assault (see **glossary**) under Penal Code 22.01(a) (1).
- Sells, gives, or delivers to another person or possesses, uses, or is under the influence of a controlled substance, or dangerous drug in an amount not constituting a felony offense. (School-related felony drug offenses are addressed in the Expulsion section of the Code). (See **glossary** for "under the influence" "controlled substance," and "dangerous drug.")
- Sells, gives, or delivers to another person or possesses, uses, or is under the influence of marijuana or THC. A student with a valid prescription for low-THC cannabis as authorized by Chapter 487 of the Health and Safety Code does not violate this provision.

- Sells, gives, or delivers to another person an alcoholic beverage; commits a serious act or offense while under the influence of alcohol, or possesses, uses, or is under the influence of alcohol.
- Behaves in a manner that contains the elements of an offense relating to abusable volatile chemicals.
- Sells, gives, or delivers to another person a nicotine delivery system or an e-cigarette.
- Behaves in a manner that contains the elements of the offense of public lewdness or indecent exposure.
(See **glossary**)
- Engages in conduct that contains the elements of an offense of harassment against an employee under Penal Code 42.07 (a)(1), (2), (3), or (7).
- Engages in expellable conduct and is six to nine years of age.
- Commits a federal firearms violation and is younger than six years of age.
- Engages in conduct that contains the elements of the offense of retaliation against any school employee or volunteer on or off school property
- Engages in conduct that contains the elements of harassment under Penal Code 42.07 against any school employee or volunteer on or off school property.
- The student receives deferred prosecution [see Glossary, or a court or jury finds that the student has engaged in delinquent conduct [see Glossary], or the Superintendent or designee has a reasonable belief under Section 53.03, Family Code, for conduct defined as any of the following offenses under the Penal Code:
 1. A felony offense under Title 5:
 2. The offense of deadly conduct under Section 22.05
 3. The felony offense of aggravated robbery under Section 29.03
 4. The offense of disorderly conduct involving a firearm under Section 42.01(a)(7) or (8); or
 1. The offense of unlawfully carrying weapons under Section 46.02, except for an offense punishable as a Class C misdemeanor under that section.

Sexual Assault and Campus Assignments

A student shall be transferred to another campus if:

- The student has been convicted of continuous sexual abuse of a young child or disabled individual or convicted of or placed on deferred adjudication for sexual assault or aggravated sexual assault against another student on the same campus; and
- The victim's parent or another person with the authority to act on behalf of the victim requests that the board transfer the offending student to another campus.

If there is no other campus in the district serving the grade level of the offending student, the offending student shall be transferred to a DAEP.

Process

Removals to a DAEP will be made by the Office of Student Discipline.

Conference

When a student is removed from class for a DAEP offense, the CBC or appropriate administrator shall schedule a conference within three school days with the student's parent, the student, the referring campus, and, in the case of a teacher removal, the teacher.

At the conference, the CBC or appropriate administrator shall provide the student:

- Information, orally or in writing, of the reasons for the removal;
- An explanation of the basis for the removal; and

- An opportunity to respond to the reasons for the removal.

Following valid attempts to require attendance, the district may hold the conference and make a placement decision regardless of whether the student or the student's parents attend the conference.

Consideration of Mitigating Factors

In deciding whether to place a student in a DAEP, regardless of whether the action is mandatory or discretionary, the campus administrator shall take into consideration:

1. Self-defense (see **glossary**),
2. Intent or lack of intent at the time the student engaged in the conduct,
3. The student's disciplinary history,
4. A disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct,
5. A student's status in the conservatorship of the Department of Family and Protective Services (foster care), or
6. A student's status as homeless.

Placement Order

After the conference, if the student is placed in a DAEP, the campus CBC or appropriate administrator shall write a placement order. A copy of the DAEP placement order and information for the parent or person standing in parental relation to the student regarding the process for requesting a full individual and initial evaluation of the student for purposes of special education services shall be sent to the student and the student's parent.

Not later than the second business day after the conference, the board's designee shall deliver to the juvenile court a copy of the placement order and all information required by Section 52.04 of the Family Code. If the student is placed in the DAEP and the length of placement is inconsistent with the guidelines included in this Code, the placement order shall give notice of the inconsistency.

DAEP at Capacity

If a DAEP is at capacity at the time the appropriate administrator or designee is deciding placement for conduct related to marijuana, THC, an e-cigarette, alcohol, or an abusable volatile chemical, the student shall be placed in in-school suspension then transferred to a DAEP for the remainder of the period if space becomes available before the expiration of the period of the placement.

If a DAEP is at capacity at the time the appropriate administrator or designee is deciding placement for a student who engaged in violent conduct, a student placed in a DAEP for conduct related to marijuana, THC, an e-cigarette, alcohol, or an abusable volatile chemical may be placed in in-school suspension to make a position in the DAEP available for the student who engaged in violent conduct. If a position becomes available in a DAEP before the expiration of the period of the placement for the student removed, the student shall be returned to a DAEP for the remainder of the period.

Coursework Notice

The parent or guardian of a student placed in DAEP shall be given written notice of the student's opportunity to complete, at no cost to the student, a foundation curriculum course in which the student was enrolled at the time of removal, and which is required for graduation. The notice shall include information regarding all methods available for completing the coursework.

Length of Placement

The campus CBC or appropriate administrator shall determine the duration of a student's placement in a DAEP. The duration of a student's placement shall be determined case by case based on the seriousness of the offense, the student's age and grade level, the frequency of misconduct, the student's attitude, and statutory requirements. The maximum period of DAEP placement shall be one calendar year, except as provided below.

Unless otherwise specified in the placement order, days absent from a DAEP shall not count toward fulfilling the total number of days required in a student's DAEP placement order.

The district shall administer the required pre- and post-assessments for students assigned to DAEP for a period of 90 days or longer in accordance with established district administrative procedures for administering other diagnostic or benchmark assessments.

Exceeds One Year

Placement in a DAEP may exceed one year when a review by the district determines that the student is a threat to the safety of other students or to district employees.

The statutory limitations on the length of a DAEP placement do not apply to a placement resulting from the board's decision to place a student who engaged in the sexual assault of another student, so the students are not assigned to the same campus.

Exceeds School Year

Students who are in a DAEP placement at the end of one school year may be required to continue that placement at the start of the next school year to complete the assigned term of placement.

For placement in a DAEP to extend beyond the end of the school year, the appropriate administrator or the board's designee must determine that:

1. The student's presence in the regular classroom or campus presents a danger of physical harm to the student or others; or
2. The student has engaged in serious or persistent misbehavior (see **glossary**) that violates the district's Code of Conduct.

Exceeds 60 Days

For placement in a DAEP to extend beyond 60 days or the end of the next grading period, whichever is sooner, a student's parent shall be given notice and the opportunity to participate in a proceeding before the board or the board's designee.

Appeals

Appeals from students or parents regarding a student's placement in a Disciplinary Alternative Education Program (DAEP) should follow the guidelines outlined in policy FOC(LOCAL). All Level One DAEP appeals must be directed to the Director of Student Discipline. Disciplinary consequences will not be delayed while an appeal is under review. The decision made by the Director is final and cannot be appealed further. Copies of this policy are available at the principal's office, the central administration office, or online through Policy On-Line at www.houstonisd.org.

Restrictions During Placement

The district does not permit a student who is placed in a DAEP to participate in any school-sponsored or school-related extracurricular or co-curricular activities, including seeking or holding honorary positions and/or membership in school-sponsored clubs and organizations. The district shall provide transportation to students in a DAEP at the elementary and middle school levels. A student with a disability who is entitled to transportation in accordance with the student's individualized education program (IEP) or Section 504 plan will receive transportation regardless of grade level.

For seniors who are eligible to graduate and are assigned to a DAEP at the time of graduation, the placement in the program will continue through graduation, and the student shall not be allowed to participate in the graduation ceremony and related graduation activities unless otherwise specified in the DAEP placement order.

Placement Review

A student placed in a DAEP shall be provided a review of his or her status, including academic status, by the campus administrator or the board's designee, at intervals not to exceed 120 days. In the case of a high school student, the student's progress toward graduation and the student's graduation plan shall also be reviewed. At the review, the student or the student's parent shall be given the opportunity to present arguments for the student's return to the regular classroom or campus. The student may not be returned to the classroom of a teacher who removed the student without that teacher's consent.

Additional Misconduct

If during the term of placement in a DAEP the student engages in additional misconduct for which placement in a DAEP or expulsion is required or permitted, additional proceedings may be conducted, and the appropriate administrator or designee may enter an additional disciplinary order as a result of those proceedings.

Notice of Criminal Proceedings

When a student is placed in a DAEP for certain offenses, the office of the prosecuting attorney shall notify the district if:

1. Prosecution of a student's case was refused for lack of prosecutorial merit or insufficient evidence, and no formal proceedings, deferred adjudication (see **glossary**), or deferred prosecution will be initiated; or
2. The court or jury found a student not guilty or made a finding that the student did not engage in delinquent conduct or conduct indicating a need for supervision, and the case was dismissed with prejudice.

If a student was placed in a DAEP for such conduct, on receiving the notice from the prosecutor, the superintendent or designee shall review the student's placement and schedule a review with the student's parent not later than the third day after the superintendent or designee receives notice from the prosecutor. The student may not be returned to the regular classroom pending the review.

After reviewing the notice and receiving information from the student's parent, the superintendent or designee may continue the student's placement if there is reason to believe that the presence of the student in the regular classroom threatens the safety of other students or teachers.

The student or the student's parent may appeal the superintendent's decision to the board. The student may not be returned to the regular classroom pending the appeal. In the case of an appeal, the board shall, at the next scheduled meeting, review the notice from the prosecutor and receive information from the student, the student's parent, and the superintendent or designee, and confirm or reverse the decision of the superintendent or designee. The board will make a record of the proceedings. If the board confirms the decision of the superintendent or designee, the student and the student's parent may appeal to the Commissioner of Education. The student may not be returned to the regular classroom pending the appeal.

Withdrawal During Process

When a student violates the district's Code of Conduct in a way that requires or permits the student to be placed in a DAEP and the student withdraws from the district before a placement order is completed, the appropriate administrator or designee may complete the proceedings and issue a placement order. If the student then re-enrolls in the district during the same or a subsequent school year, the district may enforce the order at that time, less any period of the placement that has been served by the student during enrollment in another district. If the appropriate administrator or the board fails to issue a placement order after the student withdraws, the next district in which the student enrolls may complete the proceedings and issue a placement order.

Newly Enrolled Students

The district shall decide on a case-by-case basis whether to continue the placement of a student who enrolls in the district and was assigned to a DAEP in an open enrollment charter school or another district. The district may place the student in the district's DAEP or a regular classroom setting.

When a student enrolls in the district with a DAEP placement from a district in another state, the district has the right to place the student in DAEP to the same extent as any other newly enrolled student if the behavior committed is a reason for DAEP placement in the receiving district.

State law requires the district to reduce a placement imposed by a district in another state that exceeds one year so that the total placement does not exceed one year. After a review, however, the placement may be extended beyond a year if the district determines the student is a threat to the safety of other students or employees or the extended placement is in the best interest of the student.

Emergency Placement Procedure

When an emergency placement is necessary because the student's behavior is so unruly, disruptive, or abusive that it seriously interferes with classroom or school operations, the student shall be given oral notice of the reason for the action. Not later than the tenth day after the date of the placement, the student shall be given the appropriate conference required for assignment to a DAEP.

Transition Services

In accordance with law and district procedures, campus staff shall provide transition services to a student returning to the regular classroom from an alternative education program, including a DAEP. See policy FOCA (LEGAL) for more information.

PLACEMENT AND/OR EXPULSION FOR CERTAIN OFFENSES

This section includes two categories of offenses for which the Education Code provides unique procedures and specific consequences.

Registered Sex Offenders

Upon receiving notification in accordance with state law that a student is currently required to register as a sex offender, the district must remove the student from the regular classroom and determine appropriate placement unless the court orders JJAEP placement. If the student is under any form of court supervision, including probation, community supervision, or parole, the student shall be placed in DAEP for at least one semester.

If the student is not under any form of court supervision, the placement may be in the DAEP for one semester or placed in a regular classroom. The student may not be placed in the regular classroom if the board or its designee determines that the student's presence:

1. Threatens the safety of other students or teachers,
2. Will be detrimental to the educational process, or
3. Is not in the best interest of the district's students.

Review Committee

At the end of the first semester of a student's placement in an alternative educational setting and before the beginning of each school year for which the student remains in an alternative placement, the district shall convene a committee, in accordance with state law, to review the student's placement. The committee shall recommend whether the student should return to the regular classroom or remain in the placement. Absent a special finding, the board or its designee must follow the committee's recommendation. The placement review of a student with a disability who receives special education services must be done by the ARD committee.

Newly Enrolled Student

If a student enrolls in the district during a mandatory placement as a registered sex offender, the district may count any time already spent by the student in a placement or may require an additional semester in an alternative placement without conducting a review of the placement.

Appeal

A student or the student's parent may appeal the placement by requesting a conference between the board or its designee, the student, and the student's parent. The conference is limited to the factual question of whether the student is required to register as a sex offender. Any decision of the board or its designee is final and may not be appealed.

Certain Felonies

Regardless of whether DAEP placement or expulsion is required or permitted by one of the reasons in the DAEP Placement or Expulsion sections, in accordance with Education Code 37.0081, a student may be expelled and placed in either DAEP or JJAEP if the board or its designee makes certain findings and the following circumstances exist in relation to aggravated robbery or a felony offense under Title 5 (see **glossary**) of the Penal Code. The student must have:

- Received deferred prosecution for conduct defined as aggravated robbery or a Title 5 felony offense;
- Been found by a court or jury to have engaged in delinquent conduct for conduct defined as aggravated robbery or a Title 5 felony offense;
- Been charged with engaging in conduct defined as aggravated robbery or a Title 5 felony offense;
- Been referred to a juvenile court for allegedly engaging in delinquent conduct for conduct defined as aggravated robbery or a Title 5 felony offense; or
- Received probation or deferred adjudication or has been arrested for, charged with, or convicted of aggravated robbery or a Title 5 felony offense.

The district may expel the student and order placement under these circumstances regardless of:

1. The date on which the student's conduct occurred,
2. The location at which the conduct occurred,
3. Whether the conduct occurred while the student was enrolled in the district, or
4. Whether the student has successfully completed any court disposition requirements imposed in connection with the conduct.

Hearing and Required Findings

The student must first have a hearing before the board or its designee, who must determine that in addition to the circumstances above that allow for the expulsion, the student's presence in the regular classroom:

1. Threatens the safety of other students or teachers,
2. Will be detrimental to the educational process, or
3. Is not in the best interest of the district's students.

Any decision of the board or the board's designee under this section is final and may not be appealed.

Length of Placement

The student is subject to the placement until:

1. The student graduates from high school,
2. The charges are dismissed or reduced to a misdemeanor offense, or
3. The student completes the term of the placement or is assigned to another program.

Placement Review

A student placed in a DAEP or JJAEP under these circumstances is entitled to a review of his or her status, including academic status, by the campus administrator or board's designee at intervals not to exceed 120 days. In the case of a high school student, the student's progress toward graduation and the student's graduation plan shall also be reviewed. At the review, the student or the student's parent shall have the opportunity to present arguments for the student's return to the regular classroom or campus.

Newly Enrolled Students

A student who enrolls in the district before completing a placement under this section from another school district must complete the term of the placement.

EXPULSION

In deciding whether to order expulsion, regardless of whether the action is mandatory or discretionary, the district will take into consideration:

1. Self-defense (see **glossary**),
2. Intent or lack of intent at the time the student engaged in the conduct,
3. The student's disciplinary history,
4. A disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct,
5. A student's status in the conservatorship of the Department of Family and Protective Services (foster care), or
6. A student's status as homeless.

Discretionary Expulsion: Misconduct That May Result in Expulsion

Some of the following types of misconduct may result in mandatory placement in a DAEP, whether or not a student is expelled. (See **DAEP Placement**)

Any Location

A student may be expelled for:

- Engaging in bullying that encourages a student to commit or attempt to commit suicide.
- Inciting violence against a student through group bullying.
- Releasing or threatening to release intimate visual material of a minor or a student who is 18 years of age or older without the student's consent.
- Criminal mischief, if punishable as a felony.
- Breach of computer security. (See **glossary**)
- Engaging in conduct relating to a false alarm or report (including a bomb threat) or a terroristic threat involving a public school.

At School, Within 300 Feet, or at a School Event

A student may be expelled for committing any of the following offenses on or within 300 feet of school property, as measured from any point on the school's real property boundary line or while attending a school-sponsored or school-related activity on or off school property:

- Selling, giving, or delivering to another person or possessing, using, or being under the influence of any amount of marijuana, a controlled substance, or a dangerous drug. A student with a valid prescription for low-THC cannabis as authorized by Chapter 487 of the Health and Safety Code does not violate this provision. (See **glossary** for "under the influence.")
- Selling, giving, or delivering to another person or possessing, using, or being under the influence of any amount of alcohol; or committing a serious act or offense while under the influence of alcohol.
- Engaging in conduct that contains the elements of an offense relating to abusable volatile chemicals.
- Engaging in deadly conduct. (See **glossary**.)

Within 300 Feet of School

A student may be expelled for possession of a firearm, as defined by federal law, while within 300 feet of school property, as measured from any point on the school's real property boundary line. :

Property of Another District

A student **may** be expelled for committing any offense that is a state-mandated expellable offense if the offense is committed on the property of another district in Texas or while the student is attending a school-sponsored or school-related activity of a school in another district in Texas.

While in DAEP

A student may be expelled for engaging in documented serious misbehavior that violates the district's Code of Conduct, despite documented behavioral interventions while placed in a DAEP. For purposes of discretionary expulsion from a DAEP, serious misbehavior means:

1. Deliberate violent behavior that poses a direct threat to the health or safety of others;
2. Extortion, meaning the gaining of money or other property by force or threat;
3. Conduct that constitutes coercion, as defined by Penal Code 1.07, Penal Code; or
4. Conduct that constitutes the offense of:
 - a. Public lewdness under Penal Code 21.07,
 - b. Indecent exposure under Penal Code 21.08,
 - c. Criminal mischief under Penal Code 28.03,
 - d. Hazing under Education Code 37.152, or
 - e. Harassment under Penal Code 42.07(a) (1) of a student or district employee

Mandatory Expulsion: Misconduct that Requires Expulsion

A student **must** be expelled under federal or state law for any of the following offenses that occur on or off school property:

Under Federal Law

Bringing to school or possessing at school, including any setting that is under the district's control or supervision for the purpose of a school activity, a firearm, as defined by federal law. (See **glossary**).

Note: Mandatory expulsion under the federal Gun Free Schools Act does not apply to a firearm that is lawfully stored inside a locked vehicle or to firearms used in activities approved and authorized by the district when the district has adopted appropriate safeguards to ensure student safety.

Under the Penal Code

- Unlawfully carrying on or about the student's person the following, in the manner prohibited by Penal Code 46.02:
 - A handgun, defined by state law as any firearm designed, made, or adapted to be used with one hand. (See **glossary**.) Note: A student may not be expelled solely on the basis of the student's use, exhibition, or possession of a firearm that occurs at an approved target range facility that is not located on a school campus; while participating in or preparing for a school-sponsored, shooting competition or a shooting sports activity that is sponsored or supported by the Parks and Wildlife Department; or a shooting sports sanctioning organization working with the department. [See policy FNCG(LEGAL).]
 - A location-restricted knife, as defined by state law. (See **glossary**.)
- Possessing, manufacturing, transporting, repairing, or selling a prohibited weapon, as defined in state law. (See **glossary**.)
- Engages in conduct that contains the elements of the offense of exhibiting, using, or threatening to exhibit or use a firearm under Education Code 37.125.

- Behaving in a manner that contains the elements of the following offenses under the Penal Code:
 - Aggravated assault, sexual assault, or aggravated sexual assault.
 - Arson. (See **glossary**.)
 - Murder, capital murder, or criminal attempt to commit murder or capital murder.
 - Indecency with a child.
 - Kidnapping or aggravated kidnapping.
 - Burglary, robbery or aggravated robbery.
 - Manslaughter.
 - Criminally negligent homicide.
 - Continuous sexual abuse of a young child or disabled individual.
 - Behavior punishable as a felony that involves the selling, giving or delivering to another person, possessing, using, or being under the influence of a controlled substance or a dangerous drug.
 - Engaging in conduct that contains elements of assault against a school employee or volunteer.

Under Age Ten

When a student under the age of ten engages in behavior that is expellable behavior, the student shall not be expelled but shall be placed in a Disciplinary Alternative Education Program (DAEP). A student under age six shall not be placed in a DAEP unless the student commits a federal firearm offense.

Process

If a student is believed to have committed an expellable offense, the appropriate administrator shall schedule a hearing within a reasonable time. The student's parent shall be invited in writing to attend the hearing.

Until a hearing can be held, the administrator may place the student in:

- Another appropriate classroom.
- In-school suspension.
- Out-of-school suspension.
- A Disciplinary Alternative Education Program (DAEP).

Hearing

A student facing expulsion shall be given a hearing with appropriate due process. The student is entitled to:

1. Representation by the student's parent or another adult who can provide guidance to the student and who is not an employee of the district,
2. An opportunity to testify and to present evidence and witnesses in the student's defense, and
3. An opportunity to question the witnesses called by the district at the hearing.

After providing notice to the student and parent of the hearing, the district may hold the hearing regardless of whether the student or the student's parent attends. The HISD School Board delegates to the superintendent or designee authority to conduct hearings and expel students.

Board Review of Expulsion

After the due process hearing, the expelled student may request the board review the expulsion decisions. The student or parent must submit a written request to the Chief of Schools Office within seven days after receipt of the written decision. The superintendent must provide the student or parent written notice of the date, time, and place of the meeting at which the board will review the decision.

The board shall review the record of the expulsion hearing in a closed meeting. The board may also hear a statement from the student or parent and from the board's designee.

The board shall consider and base its decision on evidence reflected in the record and any statements made by the parties at the review. The board shall make and communicate its decision orally at the conclusion of the presentation. Consequences shall not be deferred pending the outcome of the hearing.

Expulsion Order

Before ordering the expulsion, the board or its designee shall take into consideration:

1. Self-defense (see **glossary**),
2. Intent or lack of intent at the time the student engaged in the conduct,
3. The student's disciplinary history,
4. A disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct,
5. A student's status in the conservatorship of the Department of Family and Protective Services (foster care), or
6. A student's status as homeless.

If the student is expelled, the board or its designee shall deliver to the student and the student's parent a copy of the order expelling the student.

Not later than the second business day after the hearing, the superintendent or designee shall deliver to the juvenile court a copy of the expulsion order and the information required by Section 52.04 of the Family Code. If the length of the expulsion is inconsistent with the guidelines included in the Student Code of Conduct, the expulsion order shall give notice of the inconsistency.

Length of Expulsion

The length of an expulsion shall be based on the seriousness of the offense, the student's age and grade level, the frequency of misbehavior, the student's attitude, and statutory requirements. The duration of a student's expulsion shall be determined on a case-by-case basis. The maximum period of expulsion is one calendar year, except as provided below:

An expulsion may not exceed one year unless, after review, the district determines that:

1. The student is a threat to the safety of other students or to district employees; or
2. Extended expulsion is in the best interest of the student.

State and federal law require a student to be expelled from the regular classroom for a period of at least one calendar year for bringing a firearm, as defined by federal law, to school. However, the superintendent may modify the length of the expulsion on a case-by-case basis.

Students who commit offenses that require expulsion at the end of one school year may be expelled into the next school year to complete the term of expulsion.

Withdrawal During Process

When a student's conduct requires or permits expulsion from the district and the student withdraws from the district before the expulsion hearing takes place, the district may conduct the hearing after sending written notice to the parent and student.

If the student then re-enrolls in the district during the same or subsequent school year, the district may enforce the expulsion order at that time, less any expulsion period that has been served by the student during enrollment in another district. If the superintendent's designee or the board fails to issue an expulsion order after the student withdraws, the next district in which the student enrolls may complete the proceedings.

Additional Misconduct

If during the expulsion, the student engages in additional conduct for which placement in a DAEP or expulsion is required or permitted, additional proceedings may be conducted, and the superintendent's designee or the board may issue an additional disciplinary order as a result of those proceedings.

Restrictions During Expulsion

Expelled students are prohibited from being on school grounds or attending school-sponsored or school-related activities during the period of expulsion. No district academic credit shall be earned for work missed during the period of expulsion unless the student is enrolled in a JJAEP or another district-approved program.

Newly Enrolled Students

The district shall decide on a case-by-case basis the placement of a student who is subject to an expulsion order from another district or an open enrollment charter school upon enrollment in the district.

If a student expelled in another state enrolls in the district, the district may continue the expulsion under the terms of the expulsion order, may place the student in a DAEP for the period specified in the order, or may allow the student to attend regular classes if:

1. The out-of-state district provides the district with a copy of the expulsion order, and
2. The offense resulting in the expulsion is also an expellable offense in the district in which the student is enrolling.

If a student is expelled by a district in another state for a period that exceeds one year and the district continues the expulsion or places the student in a DAEP, the district shall reduce the period of the expulsion or DAEP placement so that the entire period does not exceed one year, unless after a review it is determined that:

1. The student is a threat to the safety of other students or district employees; or
2. Extended placement is in the best interest of the student.

Emergency Expulsion Procedures

When an emergency expulsion is necessary to protect persons or property from imminent harm, the student shall be given verbal notice of the reason for the action. Within ten days after the date of the emergency expulsion, the student shall be given appropriate due process required for a student facing expulsion.

DAEP Placement of Expelled Students

The district may provide educational services to any expelled student in a DAEP; however, educational services in the DAEP must be provided if the student is less than ten years of age.

Transition Services

In accordance with law and district procedures, campus staff shall provide transition services for a student returning to the regular classroom from placement in an alternative education program, including a DAEP or JJAEP. See policies FOCA (LEGAL) and FODA (LEGAL) for more information.

GLOSSARY

The glossary provides legal definitions and locally established definitions and is intended to assist in understanding terms related to the Student Code of Conduct.

Abuse is improper or excessive use.

Aggravated robbery is defined in part by Penal Code 29.03(a) as when a person commits robbery and:

1. Causes serious bodily injury to another;
2. Uses or exhibits a deadly weapon; or
3. Causes bodily injury to another person or threatens or places another person in fear of imminent bodily injury or death, if the other person is:
 - a. 65 years of age or older; or
 - b. a disabled person.

Antisemitism is defined by Government Code Section 448.01 as a certain perception of Jews that may be expressed as hatred toward Jews. The term includes rhetorical and physical acts of antisemitism directed toward Jewish or non-Jewish individuals or their property or toward Jewish community institutions and religious facilities. Examples of antisemitism are included with the International Holocaust Remembrance Alliance's "Working Definition of Antisemitism adopted on May 26, 2016.

Armor-piercing ammunition is defined by Penal Code 46.01 as handgun ammunition used in pistols and revolvers and designed primarily for the purpose of penetrating metal or body armor.

Arson is defined in part by Penal Code 28.02 as a crime that involves:

1. Starting a fire or causing an explosion with intent to destroy or damage:
 - a. Any vegetation, fence, or structure on open-space land; or
 - b. Any building, habitation, or vehicle:
 - I. Knowing that it is within the limits of an incorporated city or town;
 - II. Knowing that it is insured against damage or destruction;
 - III. Knowing that it is subject to a mortgage or other security interest;
 - IV. Knowing that it is located on property belonging to another;
 - V. Knowing that it has located within a property belonging to another; or
 - VI. When the person starting the fire is reckless about whether the burning or explosion will endanger the life of some individual or the safety of the property of another;
1. Recklessly starting a fire or causing an explosion while manufacturing or attempting to manufacture a controlled substance if the fire or explosion damages any building, habitation, or vehicle; or
2. Intentionally starting a fire or causing an explosion and in so doing:
 - c. Recklessly damaging or destroying a building belonging to another, or
 - d. Recklessly causing another person to suffer bodily injury or death.

Assault is defined in part by Penal Code 22.01 as intentionally, knowingly, or recklessly causing bodily injury to another; intentionally or knowingly threatening another with imminent bodily injury; or intentionally or knowingly causing physical contact with another that can reasonably be regarded as offensive or provocative.

Breach of Computer Security includes knowingly accessing a computer, computer network, or computer system without the effective consent of the owner as defined in Penal Code 33.02, if the conduct involves accessing a computer, computer network, or computer system owned by or operated on behalf of a school district; and the student knowingly alters, damages, or deletes school district property or information; or commits a breach of any other computer, computer network, or computer system.

Bullying is defined in Section 37.0832 of the Education Code as a single significant act or a pattern of acts by one or more students directed at another student that exploits an imbalance of power and involves engaging in written or verbal expression, expression through electronic means, or physical conduct that:

1. Has the effect or will have the effect of physically harming a student, damaging a student's property, or placing a student in reasonable fear of harm to the student's person or of damage to the student's property;
2. Is sufficiently severe, persistent, or pervasive enough that the action or threat creates an intimidating, threatening, or abusive educational environment for a student;
3. Materially and substantially disrupts the educational process or the orderly operation of a classroom or school; or
4. Infringes on the rights of the victim at school.

Bullying includes cyberbullying. (See below.) This state law on bullying prevention applies to:

1. Bullying that occurs on or is delivered to school property or to the site of a school-sponsored or school-related activity on or off school property;
2. Bullying that occurs on a publicly or privately owned school bus or vehicle being used for transportation of students to or from school or a school-sponsored or school-related activity; and
3. Cyberbullying that occurs off school property or outside of a school-sponsored or school-related activity if the cyberbullying interferes with a student's educational opportunities or substantially disrupts the orderly operation of a classroom, school, or school-sponsored or school-related activity

Chemical dispensing device is defined by Penal Code 46.01 as a device designed, made, or adapted for the purpose of dispensing a substance capable of causing an adverse psychological or physiological effect on a human being. A small chemical dispenser sold commercially for personal protection is not in this category.

Club is defined by Penal Code 46.01 as an instrument specially designed, made, or adapted for the purpose of inflicting serious bodily injury or death by striking a person with the instrument, and includes but is not limited to a blackjack, nightstick, mace, and tomahawk.

Controlled Substance means a substance, including a drug, an adulterant, and a dilutant, listed in Schedules I through V or Penalty Group 1, 1-A, 1-B, 2, 2-A, 3 or 4 of the Texas Controlled Substances Act. The term includes the aggregate weight of any mixture, solution, or other substance containing a controlled substance. The term does not include hemp, as defined by Agriculture Code 121.001, or the tetrahydrocannabinols (THC) in hemp.

Criminal Street Gang is defined by Penal Code 71.01 as three or more persons having a common identifying sign or symbol or an identifiable leadership who continuously or regularly associate in the commission of criminal activity

Cyberbullying is defined by Education Code 37.0832 as bullying that is done through the use of any electronic communication device, including through the use of a cellular or other type of telephone, a computer, a camera, electronic mail, instant messaging, text messaging, a social media application, an internet website, or any other internet-based communication tool.

Dangerous drug is defined by Health and Safety Code 483.001 as a device or drug that is unsafe for self-medication and that is not included in Schedules I through V or Penalty Groups 1 through 4 of the Texas Controlled Substances Act. The term includes a device or drug that federal law prohibits dispensing without prescription or restricts to use by or on the order of a licensed veterinarian.

Dating Violence occurs when a person in a current or past dating relationship uses physical, sexual, verbal, or emotional abuse to harm, threaten, intimidate, or control another person in the relationship. Dating violence also occurs when a person commits these acts against a person in a marriage or dating relationship with the individual who is or was once in a marriage or dating relationship with the person committing the offense, as defined by Section 71.0021 of the Family Code.

Deadly conduct under Penal Code 22.05 occurs when a person recklessly engages in conduct that places another in imminent danger of serious bodily injury, such as knowingly discharging a firearm in the direction of an individual, habitation, building, or vehicle.

Deferred adjudication is an alternative to seeking a conviction in court that may be offered to a juvenile for delinquent conduct or conduct indicating a need for supervision.

Deferred prosecution may be offered to a juvenile as an alternative to seeking a conviction in court for delinquent conduct or conduct indicating a need for supervision.

Delinquent conduct is conduct that violates either state or federal law and is punishable by imprisonment or confinement in jail. It includes conduct that violates certain juvenile court orders, including probation orders, but does not include violations of traffic laws.

Demerit is a mark given to someone for doing something wrong that may result in the loss of rank or privilege

Discretionary means that something is left to or regulated by a local decision maker.

E-cigarette means an electronic cigarette or any other device that simulates smoking by using a mechanical heating element, battery, or electronic circuit to deliver nicotine or other substances to the individual inhaling from the device or a consumable liquid solution or other material aerosolized or vaporized during the use of an electronic cigarette or other device described by this provision. The term includes any device that is manufactured, distributed, or sold as an e-cigarette, e-cigar, or e-pipe or under another product name or description and a component, part, or accessory for the device, regardless of whether the component, part, or accessory is sold separately from the device.

Explosive weapon is defined by Penal Code 46.01 as any explosive or incendiary bomb, grenade, rocket, or mine and its delivery mechanism that is designed, made, or adapted for the purpose of inflicting serious bodily injury, death, substantial property damage, or for the principal purpose of causing such a loud report as to cause undue public alarm or terror.

False Alarm or Report under Penal Code 42.06 occurs when a person knowingly initiates, communicates, or circulates a report of a present, past, or future bombing, fire, offense, or other emergency that they know is false or baseless and that would ordinarily:

1. Cause action by an official or volunteer agency organized to deal with emergencies;
2. Place a person in fear of imminent serious bodily injury; or
3. Prevent or interrupt the occupation of a building, room, or place of assembly.

Firearm is defined by federal law (18 U.S.C. 921(a)) as:

1. Any weapon (including a starter gun) that will, is designed to, or may readily be converted to expel a projectile by the action of an explosive;
2. The frame or receiver of any such weapon;
3. Any firearm muffler or firearm silencer, defined as any device for silencing, muffling, or diminishing the report of a portable firearm; or
4. Any destructive device, such as any explosive, incendiary or poison gas bomb, or grenade.
Such a term does not include an antique firearm.

Graffiti includes markings with paint, an indelible pen or marker, or an etching or engraving device on tangible property without the effective consent of the owner. The markings may include inscriptions, slogans, drawings, or paintings.

Handgun is defined by Penal Code 46.01 as any firearm that is designed, made, or adapted to be fired with one hand.

Harassment includes:

1. Conduct that meets the definition established in district policies DIA (LOCAL) and FFH (LOCAL);
2. Conduct that threatens to cause harm or bodily injury to another person, including a district student, employee, board member, or volunteer; is sexually intimidating; causes physical damage to the property of another student; subjects another student to physical confinement or restraint; or maliciously and substantially harms another student's physical or emotional health or safety as defined in Education Code 37.001(b)(2); or
3. Conduct that is punishable as a crime under Penal Code 42.07, including the following types of conduct if carried out with the intent to harass, annoy, alarm, abuse, torment, or embarrass another:
 - a. Initiating communication and, in the course of the communication, making a comment, request, suggestion, or proposal that is obscene, as defined by law;
 - b. Threatening, in a manner reasonably likely to alarm the person receiving the threat, to inflict bodily injury on the person or to commit a felony against the person, a member of the person's family or household, or the person's property;
 - c. Conveying, in a manner reasonably likely to alarm the person receiving the report,
 - d. a false report, which is known by the conveyor to be false, that another person has suffered death or serious bodily injury;
 - e. Causing the telephone of another to ring repeatedly or making repeated telephone communications anonymously or in a manner reasonably likely to harass, annoy, alarm, abuse, torment, embarrass, or offend another;
 - f. Making a telephone call and intentionally failing to hang up or disengage the connection;
 - g. Knowingly permitting a telephone under the person's control to be used by another to commit an offense under this section;
 - h. Sending repeated electronic communications in a manner reasonably likely to harass, annoy, alarm, abuse, torment, embarrass, or offend another;
 - i. Publishing on an internet website, including a social media platform, repeated electronic communications in a manner reasonably likely to cause emotional distress, abuse, or torment to another person, unless the communications are made in connection with a matter of public concern, as defined by law; or
 - j. Making obscene, intimidating, or threatening telephone calls or other electronic communications from a temporary or disposable telephone number provided by an internet application or other technological means.

Hazing is defined by Education Code 37.151 as an intentional, knowing, or reckless act, on or off campus, by one person alone or acting with others, directed against a student for the purposes of pledging, initiation into, affiliation with, holding office in, or maintaining membership in a student organization If the act meets the elements in Education Code 37.151, including:

1. Any type of physical brutality;
2. An activity that subjects the student to an unreasonable risk of harm or that adversely affects the student's mental or physical health, such as sleep deprivation, exposure to the elements, confinement to small spaces, calisthenics, or consumption of food, liquids, drugs, or other substances;
3. An activity that includes, causes, or requires the student to perform a duty or task that violates the Penal Code; and
4. Coercing a student to consume a drug or alcoholic beverage in an amount that would lead a reasonable person to believe the student is intoxicated.

Hit list is defined in Education Code 37.001(b)(3) as a list of people targeted to be harmed, using a firearm, a knife, or any other object to be used with intent to cause bodily harm.

Improvised explosive device is defined by Penal Code 46.01 as a completed and operational bomb designed to cause serious bodily injury, death, or substantial property damage that is fabricated in an improvised manner using nonmilitary components.

Indecent exposure is defined by Penal Code 21.08 as an offense that occurs when a person exposes the person's anus or any part of the person's genitals with intent to arouse or gratify the sexual desire of any person and is reckless about whether another is present who will be offended or alarmed by the act.

Intimate visual material is defined by Civil Practices and Remedies Code 98B.001 and Penal Code 21.16 as visual material that depicts a person with the person's intimate parts exposed or engaged in sexual conduct. "Visual material" means any film photograph, videotape, negative, or slide of any photographic reproduction or any other physical medium that allows an image to be displayed on a computer or other video screen and any image transmitted to a computer or other video screen.

Location-restricted knife is defined by Penal Code 46.01 as a knife with a blade over five and one-half inches.

Knuckles means any instrument consisting of finger rings or guards made of a hard substance and designed or adapted for inflicting serious bodily injury or death by striking a person with a fist enclosed in the knuckles.

Look-alike weapon means an item that resembles a weapon but is not intended to be used to cause serious bodily injury.

Machine gun as defined by Penal Code 46.01 is any firearm that is capable of shooting more than two shots automatically, without manual reloading, by a single function of the trigger.

Mandatory means that something is obligatory or required because of an authority.

Mandatory Parent/Guardian Conference - If a student is placed on a mandatory parent/guardian conference, a parent/guardian must accompany the student to school the next school day for a conference. Student absences, caused by the student's failure to appear with a parent or guardian, are considered unexcused absences. This type of suspension is not considered a disciplinary alternative education program, nor does it constitute a removal from school. Parents will be notified in writing that a student has been placed on a mandatory parent/guardian conference, and the transportation department will be notified that the student is not to ride the bus to school.

Paraphernalia are devices that can be used for inhaling, ingesting, injecting, or otherwise introducing a controlled substance into the human body.

Personal Communication Device means a telephone, cell phone such as a smartphone or flip phone, tablet, smartwatch, radio device, paging device, or any other electronic device capable of telecommunication or digital communication.

Possession means to have an item on one's person or in one's personal property, including, but not limited to:

1. Clothing, purse, or backpack;
2. A private vehicle used for transportation to or from school or school-related activities, including but not limited to an automobile, truck, motorcycle or bicycle;
3. Personal Communication Devices or electronic devices; or
4. Any school property used by the student, including, but not limited to a locker or desk.

Prohibited weapon under Penal Code 46.05(a) means: The following items unless registered with the U.S. Bureau of Alcohol, Tobacco, Firearms, and Explosives or otherwise not subject to that registration requirement or unless the item is classified as a curio or relic by the U.S. Department of Justice:

1. A machine gun;
2. Armor-piercing ammunition;
3. A chemical dispensing device;
4. A zip gun;
5. A tire deflation device; or
6. An improvised explosive device.

Public Lewdness is defined by Penal Code 21.07 as an offense that occurs when a person knowingly engages in an act of sexual intercourse, deviate sexual intercourse, or sexual contact in a public place or, if not in a public place, is reckless about whether another is present who will be offended or alarmed by the act.

Public school fraternity, sorority, secret society, or gang means an organization composed wholly or in part of students that seeks to perpetuate itself by taking additional members from the students enrolled in school based on a decision of its membership rather than on the free choice of a qualified student. Educational organizations listed in Section 37.121(d) of the Education Code are excepted from this definition.

Reasonable belief is that which an ordinary person of average intelligence and sound mind would believe. Chapter 37 requires certain disciplinary decisions when the superintendent or designee has a reasonable belief that a student engaged in conduct punishable as a felony offense. In forming such a reasonable belief, the superintendent or designee may use all available information and must consider the information furnished in the notice of a student's arrest under Code of Criminal Procedure Article 15.27.

Self-defense is the use of force against another to the degree a person reasonably believes the force is immediately necessary to protect himself or herself.

Serious misbehavior means:

1. Deliberate or violent behavior that poses a direct threat to the health or safety of others;
2. Extortion, meaning the gaining of money or other property by force or threat;
3. Conduct that constitutes coercion, as defined by Section 1.07, Penal Code; or
4. Conduct that constitutes the offense of:
 - a. Public lewdness under Penal Code 21.07;
 - b. Indecent exposure under Penal Code 21.08;
 - c. Criminal mischief under Penal Code 28.03;
 - d. Hazing under Education Code 37.152; or
 - e. Harassment under Penal Code 42.07(a) (1) of a student or district employee

Serious or persistent misbehavior includes but is not limited to:

- Behavior that is grounds for permissible expulsion or mandatory DAEP placement.
- Behavior identified by the district as grounds for discretionary DAEP placement.
- Actions or demonstrations that substantially disrupt or materially interfere with school activities.
- Refusal to attempt or complete schoolwork as assigned.
- Insubordination.
- Profanity, vulgar language, or obscene gestures.
- Leaving school grounds without permission.
- Falsification of records, passes, or other school-related documents.
- Refusal to accept discipline assigned by the teacher or principal.

Short-barrel firearm is defined by Penal Code 46.01 as a rifle with a barrel length of less than 16 inches or a shotgun with a barrel length of less than 18 inches, or any weapon made from a rifle or shotgun that, as altered, has an overall length of less than 26 inches.

Terroristic threat is defined by Penal Code 22.07 as a threat of violence to any person or property with intent to:

1. Cause a reaction of any type to his or her threat by an official or volunteer agency organized to deal with emergencies;
2. Place any person in fear of imminent serious bodily injury;
3. Prevent or interrupt the occupation or use of a building, room, place of assembly, or place to which the public has access; place of employment or occupation; aircraft, automobile, or other form of conveyance; or another public place;
4. Cause impairment or interruption of public communications, public transportation, public water, gas or power supply, or other public service;
5. Place the public or a substantial group of the public in fear of serious bodily injury; or
6. Influence the conduct or activities of a branch or agency of the federal government, the state, or a political subdivision of the state (including the District).

Tire deflation device is defined in part by Penal Code 46.01 as a device, including a caltrop or spike strip, that, when driven over, impedes or stops the movement of a wheeled vehicle by puncturing one or more of the vehicle's tires.

Title 5 felonies are those crimes listed in Title 5 of the Penal Code that typically involve injury to a person and may include:

- Murder, manslaughter, or homicide under Sections 19.02-.05;
- Kidnapping under Section 20.03;
- Trafficking of persons under Section 20A.02;
- Smuggling or continuous smuggling of persons under Sections 20.05-.06;
- Assault under Sections 22.01;
- Aggravated assault under Section 22.02;
- Sexual assault under Section 22.011;
- Aggravated sexual assault under Section 22.021;
- Unlawful restraint under Section 20.02;
- Continuous sexual abuse of a young child or disabled individual under Section 21.02;
- Bestiality under Section 21.09;
- Improper relationship between educator and student under Section 21.12;
- Voyeurism under Section 21.17;

- Indecency with a child under Section 21.11;
- Invasive visual recording under Section 21.15;
- Disclosure or promotion of intimate visual material under Section 21.16;
- Sexual coercion under Section 21.18;
- Injury to a child, an elderly person, or a disabled person of any age under Section 22.04;
- Abandoning or endangering a child under Section 22.041;
- Deadly conduct under Section 22.05;
- Terroristic threat under Section 22.07;
- Aiding a person to die by suicide under Section 22.08; and
- Tampering with a consumer product under Section 22.09, [See FOC (EXHIBIT)]

Under the influence means lacking the normal use of mental or physical faculties. Impairment of a person’s physical or mental faculties may be evidenced by a pattern of abnormal or erratic behavior, the presence of physical symptoms of drug or alcohol use, or by admission. A student “under the influence” need not be legally intoxicated to trigger disciplinary action.

Use means voluntarily introducing into one’s body, by any means, a prohibited substance.

Zip gun is defined by Penal Code 46.01 as a device or combination of devices, not originally a firearm and is adapted to expel a projectile through a smooth-bore or rifled-bore barrel by using the energy generated by an explosion or burning substance.



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**Removal Under
Student Code of
Conduct**

The Student Code of Conduct must specify conditions that authorize or require a principal or other appropriate administrator to transfer a student to a disciplinary alternative education program (DAEP). *Education Code 37.001(a)(2)*

**Mandatory
Placement in DAEP**

A student shall be removed from class and placed in a DAEP if the student engages in conduct described in Education Code 37.006 that requires placement, subject to the requirements of Education Code 37.009(a) [see Process for Removal and Mitigating Factors, below]. *Education Code 37.006*

[For additional factors that must be considered in each decision concerning suspension, removal to a DAEP, expulsion, or placement in a juvenile justice alternative education program (JJAEP), see FO and the Student Code of Conduct.]

**School-Related
Misconduct**

A student shall be removed from class and placed in a DAEP if the student engages in conduct involving a public school that contains the elements of the offense of false alarm or report under Penal Code 42.06, or terroristic threat under Penal Code 22.07.

A student shall also be removed from class and placed in a DAEP if the student commits the following on or within 300 feet of school property, as measured from any point on the school's real property boundary line, or while attending a school-sponsored or school-related activity on or off school property:

1. Engages in conduct punishable as a felony.
2. Engages in conduct that contains the elements of assault, under Penal Code 22.01(a)(1).
3. Sells, gives, or delivers to another person or possesses, uses, or is under the influence of:
 - a. A controlled substance, as defined by the Texas Controlled Substances Act, Health and Safety Code Chapter 481, or by 21 U.S.C. 801, et seq., excluding marijuana, as defined by Health and Safety Code 481.002, or tetrahydrocannabinol, as defined by Department of Public Safety rule;
 - b. A dangerous drug, as defined by the Texas Dangerous Drug Act, Health and Safety Code Chapter 483.
4. Possesses, uses, or is under the influence of, or sells, gives, or delivers to another person marijuana or tetrahydrocannabinol, as defined above;
5. Sells, gives, or delivers to another person an e-cigarette, as defined by Health and Safety Code 161.081 [see FNCD];

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6. Sells, gives, or delivers to another person an alcoholic beverage, as defined by Alcoholic Beverage Code 1.04, or commits a serious act or offense while under the influence of alcohol, or possesses, uses, or is under the influence of an alcoholic beverage.
7. Engages in conduct that contains the elements of an offense relating to an abusable volatile chemical under Health and Safety Code 485.031 through 485.034.
8. Engages in conduct that contains the elements of the offense of public lewdness under Penal Code 21.07.
9. Engages in conduct that contains the elements of the offense of indecent exposure under Penal Code 21.08.
10. Engages in conduct that contains the elements of the offense of harassment under Penal Code 42.07(a)(1), (2), (3), or (7) against an employee of the district.

Education Code 37.006(a)

Exception

Removal to a DAEP for school-related misconduct is not required if the student is expelled for the same conduct. *Education Code 37.006(m)*

Retaliation

A student shall be removed from class and placed in a DAEP if the student engages in conduct on or off school property against any school employee or volunteer as defined by Education Code 22.053 containing the elements of:

1. Retaliation under Penal Code 36.06; or
2. Harassment under Penal Code 42.07.

Education Code 37.006(b)

Conduct Unrelated
to School

In addition to the circumstances listed above, a student shall be removed from class and placed in a DAEP based on conduct occurring off campus and while the student is not in attendance at a school-sponsored or school-related activity if:

1. The student receives deferred prosecution under Family Code 53.03 for conduct defined as any of the following offenses:
 - a. A felony offense under Penal Code Title 5;
 - b. The offense of deadly conduct under Penal Code 22.05;
 - c. The felony offense of aggravated robbery under Penal Code 29.03;

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- d. The offense of disorderly conduct involving a firearm under Penal Code 42.01(a)(7) or (8); or
 - e. The offense of unlawfully carrying weapons under Penal Code 46.02, except for an offense punishable as a Class C misdemeanor;
2. A court or jury finds that the student has engaged in delinquent conduct under Family Code 54.03 for conduct defined as an offense listed in item 1; or
 3. The superintendent or designee has a reasonable belief that the student has engaged in conduct defined as an offense listed in item 1.

Education Code 37.006(c)

*Reasonable
Belief*

In determining whether there is a reasonable belief that a student has engaged in conduct defined as a felony offense, a superintendent or a superintendent's designee may consider all available information and must consider the information furnished under Code of Criminal Procedure Article 15.27 other than information requested under Code of Criminal Procedure Article 15.27(k-1). *Education Code 37.006(e); Code of Criminal Procedure 15.27(a)* [See GRAA]

Title 5 Felonies

The following are felony offenses listed in Penal Code, Title 5, Offenses Against the Person.

1. Murder. *Penal Code 19.02*
2. Capital Murder. *Penal Code 19.03*
3. Manslaughter. *Penal Code 19.04*
4. Criminally Negligent Homicide. *Penal Code 19.05*
5. Unlawful Restraint, if:
 - a. The person restrained was younger than 17 years of age; or
 - b. The actor recklessly exposes the victim to a substantial risk of serious bodily injury; restrains an individual the actor knows is a public servant while the public servant is lawfully discharging an official duty or in retaliation or on account of an exercise of official power or performance of an official duty; or while in custody restrains any other person. *Penal Code 20.02*
6. Kidnapping. *Penal Code 20.03*

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7. Aggravated Kidnapping. *Penal Code 20.04*
8. Smuggling of Persons. *Penal Code 20.05*
9. Continuous Smuggling of Persons. *Penal Code 20.06*
10. Trafficking of Persons. *Penal Code 20A.02*
11. Continuous Trafficking of Persons. *Penal Code 20A.03*
12. Continuous Sexual Abuse of Young Child or Disabled Individual. *Penal Code 21.02*
13. Bestiality. *Penal Code 21.09*
14. Indecency with a Child. *Penal Code 21.11*
15. Improper Relationship between Educator and Student. *Penal Code 21.12*
16. Invasive Visual Recording. *Penal Code 21.15*
17. Unlawful Disclosure or Promotion of Intimate Visual Material. *Penal Code 21.16*
18. Voyeurism, if the victim was younger than 18 years of age at the time of the offense. *Penal Code 21.17*
19. Sexual Coercion. *Penal Code 21.18*
20. Assault, if the offense is punishable as a felony. *Penal Code 22.01*
21. Sexual Assault. *Penal Code 22.011*
22. Aggravated Assault. *Penal Code 22.02*
23. Aggravated Sexual Assault. *Penal Code 22.021*
24. Injury to a Child, Elderly Individual, or Disabled Individual. *Penal Code 22.04*
25. Abandoning or Endangering a Child, Elderly Individual, or Disabled Individual. *Penal Code 22.041*
26. Deadly Conduct, if the person knowingly discharges a firearm at or in the direction of one or more individuals, or at or in the direction of a habitation, building, or vehicle and is reckless as to whether the habitation, building, or vehicle is occupied. *Penal Code 22.05*
27. Terroristic Threat, if the actor threatens to commit any offense involving violence to any person or property with intent to:

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- a. Place any person in fear of imminent serious bodily injury if the actor knows the person is a peace officer or judge;
- b. Prevent or interrupt the occupation or use of a building, room, place of assembly, place to which the public has access, place of employment or occupation, aircraft, automobile, or other form of conveyance, or other public place if the prevention or interruption causes pecuniary loss of \$1,500 or more to the owner;
- c. Cause impairment or interruption of public communications, public transportation, public water, gas, or power supply or other public service;
- d. Place the public or a substantial group of the public in fear of serious bodily injury; or
- e. Influence the conduct or activities of a branch or agency of the federal government, the state, or a political subdivision. *Penal Code 22.07*

28. Aiding Suicide, if the conduct causes suicide or attempted suicide that results in serious bodily injury. *Penal Code 22.08*
29. Tampering with Consumer Product. *Penal Code 22.09*
30. Harassment by Persons in Certain Facilities or of Public Servant. *Penal Code 22.11*

Sexual Assault of
Another Student

A student shall be removed from class and placed in a DAEP or juvenile justice alternative education program (JJAEP) if:

1. The student was convicted of, received adjudication for, or was placed on probation for sexual assault of another student who was a young child or disabled individual while the students were assigned to the same campus, regardless of whether the assault occurred on or off school property;
2. The parent of the victim of the assault has requested that the student be transferred to a campus other than that to which the victim is assigned; and
3. There is only one campus in a district serving the grade level in which the student is enrolled.

Education Code 25.0341, 37.0051(a) [See FDE at Sexual Assault Transfer—Transfer of Assailant]

A limitation imposed by Education Code Chapter 37 on the length of placement in a DAEP or a JJAEP does not apply to a placement under this provision. *Education Code 37.0051(b)*

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Permissive Removal

Non-Title 5 Felony

A student may be removed from class and placed in a DAEP based on conduct occurring off campus and while the student is not in attendance at a school-sponsored or school-related activity if:

1. The superintendent or designee has a reasonable belief [see Reasonable Belief, above] that the student has engaged in conduct defined as a felony offense other than aggravated robbery under Penal Code 29.03, or those offenses listed in Penal Code Title 5 [see above at Title 5 Felonies]; and
2. The continued presence of the student in the regular classroom threatens the safety of other students or teachers or will be detrimental to the educational process.

Education Code 37.006(d)-(e)

Bullying

A student may be removed from class and placed in a DAEP if the student:

1. Engages in bullying that encourages a student to commit or attempt to commit suicide;
2. Incites violence against a student through group bullying; or
3. Releases or threatens to release intimate visual material of a minor or student who is 18 years of age or older without the student's consent.

Nothing in this provision exempts a school from reporting a finding of intimate visual material of a minor.

Definitions

Bullying

"Bullying" has the meaning assigned by Education Code 37.0832. [See FFI]

Intimate Visual
Material

"Intimate visual material" has the meaning assigned by Civil Practice and Remedies Code 98B.001.

Education Code 37.0052

Disruption

A student may be removed from class and placed in a disciplinary alternative education program if the student:

1. Engages in conduct that contains the elements of the offense of disruptive activities under Education Code 37.123;
2. Engages in conduct that contains the elements of the offense of disruption of classes under Education Code 37.124, only if:
 - a. The student is 12 years of age or older at the time of the conduct; and

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- b. The conduct is intentional and repeated.

Education Code 37.006(d), (d-1); 37.124(d)

E-Cigarette
Possession or Use

A student may be removed from class and placed in a disciplinary alternative education program if the student possesses or uses an e-cigarette, as defined by Health and Safety Code 161.081.

If a student who possesses or uses an e-cigarette is not placed in a disciplinary alternative education program for the first-time offense, the student shall be placed in in-school suspension for a period of at least 10 school days. [For requirements related to in-school suspension, see FOB.]

Education Code 37.006(d)

One Year After
Conduct

A principal or other appropriate administrator may, but is not required to, remove a student to a DAEP for off-campus conduct, for which removal would otherwise be required, if the principal or other appropriate administrator did not have knowledge of the conduct before the first anniversary of the date the conduct occurred. *Education Code 37.006(n)*

Certain
Organization and
Gang Membership
and Solicitation

A board or an educator shall recommend placing in DAEP any student who commits the misdemeanor offenses described in Education Code 37.121(a) and (c), regarding membership in or solicitation to join a public school fraternity, sorority, secret society, or gang [see FNCC]. *Education Code 37.121(b)*

Older Students

A person who is 21 years of age or older and is admitted by a district for the purpose of completing the requirements for a diploma is not eligible for placement in a DAEP if the person engages in conduct that would require or authorize such placement for a student under the age of 21. If the student engages in such conduct, the district shall revoke the student's admission. *Education Code 25.001(b-1)*

**Placement of
Younger Students**

A student who is younger than 10 shall be removed from class and placed in a DAEP if the student engages in conduct for which expulsion would be required by Section 37.007. *Education Code 37.006(f), .007(e)* [See FOD]

Students Younger
Than Six

Notwithstanding any other provision of the Education Code, a student who is younger than six years of age may not be removed from class and placed in a DAEP, except that a student younger than six years of age who has been expelled pursuant to the Gun Free Schools Act [see FOD] shall be provided educational services in a DAEP. *Education Code 37.006(l), .007(e)(2)*

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Process for Removal	Not later than the third class day after a student is removed by a teacher or by the school principal or other appropriate administrator, the campus behavior coordinator (CBC) or other appropriate administrator shall schedule a conference among the CBC or other appropriate administrator, the student's parent or guardian, the teacher removing the student from class, if any, and the student. At the conference, the student is entitled to written or oral notice of the reasons for the removal, an explanation of the basis for the removal, and an opportunity to respond to the reasons for the removal. The student may not be returned to the regular class pending the conference.
Conference	
Mitigating Factors	Before ordering removal, the CBC must consider whether the student acted in self-defense, the intent or lack of intent at the time the student engaged in the conduct, the student's disciplinary history, and whether the student has a disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct, regardless of whether the decision of the behavior coordinator concerns a mandatory or discretionary action.
Order	Following the conference, and whether or not each requested person is in attendance after valid attempts to require the person's attendance, the CBC, after considering any mitigating factors under Education Code 37.001(a)(4) [see FO], shall order the placement of the student for a period consistent with the Student Code of Conduct.
Appeal	If district policy allows a student to appeal to the board or the board's designee a decision of the CBC or other appropriate administrator, the decision of the board or the board's designee is final and may not be appealed. <i>Education Code 37.009(a)</i> [See Student Code of Conduct]
Right to Request a Special Education Evaluation	On the placement of a student in a DAEP, the district shall provide information to the student's parent or person standing in parental relation to the student regarding the process for requesting a full individual and initial evaluation of the student under Education Code 29.004 [see EHBAA]. <i>Education Code 37.006(p)</i>
Term of Removal	The period of the placement after removal may not exceed one year unless, after a review, a district determines that the student is a threat to the safety of other students or to district employees. <i>Education Code 37.009(a)</i> A board or designee shall set a term for a student's placement in a DAEP. If the period of placement is inconsistent with the guidelines in the Student Code of Conduct, the order must give notice of the inconsistency. The period of placement in a DAEP may not exceed

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	<p>one year unless, after a review, a district determines that the student is a threat to the safety of other students or to district employees or extended placement is in the best interest of the student. <i>Education Code 37.009(d)</i></p>
Beyond Grading Period or 60 Days	<p>If placement in a DAEP is to extend beyond 60 days or the end of the next grading period, whichever is earlier, the student's parent or guardian is entitled to notice of and an opportunity to participate in a proceeding before a board or designee.</p>
No Appeal	<p>Any decision of a board or designee concerning placement beyond 60 days or the end of the next grading period is final and cannot be appealed.</p> <p><i>Education Code 37.009(b)</i></p>
Beyond End of School Year	<p>Before a student may be placed in a DAEP for a period that extends beyond the end of the school year, a board or designee must determine that:</p> <ol style="list-style-type: none">1. The student's presence in the regular classroom program or at the student's regular campus presents a danger of physical harm to the student or another individual; or2. The student has engaged in serious or persistent misbehavior that violates the Student Code of Conduct. <p><i>Education Code 37.009(c)</i></p>
Order of Removal	<p>A board or designee shall deliver to the student and the student's parent or guardian a copy of the order placing the student in a DAEP. <i>Education Code 37.009(g)</i></p> <p>Not later than the second business day after the date of the removal conference, a board or designee shall deliver a copy of the order placing the student in a DAEP and any information required under Family Code 52.04 to the authorized officer of the juvenile court in the county in which the juvenile resides. <i>Education Code 37.010(a)</i></p>
Activities	<p>The terms of a placement under Education Code 37.006 must prohibit the student from attending or participating in school-sponsored or school-related activities. <i>Education Code 37.006(g)</i></p> <p>In addition to any notice required under Code of Criminal Procedure 15.27 [see GRAA], a principal or designee shall inform each educator who has responsibility for, or is under the direction and supervision of an educator who has responsibility for, the instruction of a student who has engaged in conduct for which DAEP placement must or may be ordered.</p>

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Each educator shall keep the information confidential from any person not entitled to the information, except that the educator may share the information with the student's parent or guardian as provided by state or federal law. An educator's certificate may be suspended or revoked for intentional failure to keep such information confidential.

Education Code 37.006(o)

DAEP at Capacity

If a DAEP is at capacity at the time a CBC is deciding placement for a student who engaged in conduct described under Education Code 37.006(a)(2)(C-1) (possession or use of marijuana), (C-2) (possession, use, delivery of an e-cigarette), (D) (delivery of alcohol), or (E) (abuse of volatile chemical), the student shall be placed in in-school suspension; and if a position becomes available in the program before the expiration of the period of the placement, transferred to the program for the remainder of the period.

Placement of
Student Who
Engaged in Violent
Conduct

If a DAEP is at capacity at the time a CBC is deciding placement for a student who engaged in conduct described under Education Code 37.007 that constitutes violent conduct [see below at Determination of Violent Conduct], a student who has been placed in the program for conduct described under Education Code 37.006(a)(2)(C-1), (C-2), (D), or (E) (above) may be removed from the program and placed in in-school suspension to make a position in the program available for the student who engaged in violent conduct. If removed from the program and a position in the program becomes available before the expiration of the period of the placement, the student shall be returned to the program for the remainder of the period.

Determination of
Violent Conduct

Violent conduct means an act by a student against another person that is intended to result in physical harm, bodily injury, or assault or a threat that reasonably places the other person in fear of imminent physical harm, bodily injury, or assault. A CBC may determine whether a specific instance of conduct listed below rises to the level of violent conduct for purposes of determining placement in a DAEP.

1. The student engages in conduct involving a public school that contains the elements of the offense of false alarm or report under Penal Code 42.06, or terroristic threat under Penal Code 22.07.
2. While on or within 300 feet of school property, or while attending a school-sponsored or school-related activity on or off school property, the student engages in conduct that contains the elements of the offense of assault under Penal Code 22.01(a)(1), including when committed as an act of retaliation

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against an employee or volunteer, as described in Education Code 37.007(d).

3. While on or within 300 feet of school property or while attending a school-sponsored or school-related activity on or off school property, the student engages in conduct that contains the elements of the offense of deadly conduct under Penal Code 22.05.
4. While within 300 feet of school property, or when committed as an act of retaliation against an employee or volunteer, whether the conduct occurs on or off school property or while attending a school-sponsored or school-related activity on or off school property, the student engages in:
 - a. Conduct that contains the elements of the offense of unlawful carrying of weapons under Penal Code 46.02;
 - b. An offense relating to prohibited weapons under Penal Code 46.05;
 - c. Aggravated assault under Penal Code 22.02;
 - d. Sexual assault under Penal Code 22.011;
 - e. Aggravated sexual assault under Penal Code 22.021;
 - f. Arson under Penal Code 28.02;
 - g. Murder under Penal Code 19.02;
 - h. Capital murder under Penal Code 19.03;
 - i. Criminal attempt to commit murder or capital murder under Penal Code 15.01;
 - j. Indecency with a child under Penal Code 21.11;
 - k. Aggravated kidnapping under Penal Code 20.04;
 - l. Aggravated robbery under Penal Code 29.03;
 - m. Manslaughter under Penal Code 19.04;
 - n. Criminally negligent homicide under Penal Code 19.05;
 - o. Continuous sexual abuse of a young child or an individual with disabilities under Penal Code 21.02;
 - p. Selling, giving, delivering to another person, possessing, using, or being under the influence of a controlled substance or dangerous drug, excluding marijuana or tetrahydrocannabinol; or

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- q. Possessing a firearm, as defined by 18 U.S.C. 921.
- 5. The student engages in conduct against another student, without regard to whether the conduct occurs on or off school property or while attending a school-sponsored or school-related activity on or off school property, that contains the elements of:
 - a. The offense of aggravated assault under Penal Code 22.02;
 - b. Sexual assault under Penal Code 22.011;
 - c. Aggravated sexual assault under Penal Code 22.021;
 - d. Murder under Penal Code 19.02;
 - e. Capital murder under Penal Code 19.03; or
 - f. Criminal attempt to commit murder or capital murder under Penal Code 15.01.
- 6. While placed in a DAEP and on the program campus, the student engages in documented serious misbehavior despite documented behavioral interventions.

Education Code 37.009(a-1)-(a-2); 19 TAC 103.1205

**Completion of
Proceedings Upon
Withdrawal**

If a student withdraws from a district before an order for placement in a DAEP is entered, the principal or board, as appropriate, may complete the proceedings and enter an order. If the student re-enrolls in the district the same or subsequent school year, the district may enforce the order at that time except for any period of the placement that has been served by the student in another district that honored the order. If the principal or board fails to enter an order after the student withdraws, the next district in which the student enrolls may complete the proceedings and enter an order. *Education Code 37.009(i)*

**Enrollment in
Another District**

If a student placed in a DAEP enrolls in another district before the expiration of the placement, a board shall provide to the district in which the student enrolls a copy of the placement order at the same time it provides other records. The district in which the student enrolls shall inform each educator who will have responsibility for, or will be under the direction and supervision of an educator who will have responsibility for, the instruction of the student of the contents of the placement order. Each educator shall keep the information confidential from any person not entitled to the information, except that the educator may share the information with the student's parent or guardian as provided by state or federal law.

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The district in which the student enrolls may continue the placement or allow the student to attend regular classes without completing the period of placement. [See FO] The district in which the student enrolls may take any of these actions if:

1. The student was placed in a DAEP by an open-enrollment charter school and the charter school provides the district a copy of the placement order; or
2. The student was placed in a DAEP by a district in another state and:
 - a. The out-of-state district provides a copy of the placement order; and
 - b. The grounds for placement are the same as grounds for placement in the enrolling district.

Education Code 37.008(j)

Out-of-State
Placement

If a student was placed in a DAEP in another state for more than one year and the enrolling district continues the placement under Education Code 37.008(j), the enrolling district shall reduce the period of placement so that the aggregate period does not exceed one year unless the enrolling district determines that:

1. The student is a threat to the safety of other students or to district employees; or
2. Extended placement is in the best interest of the student.

Education Code 37.008(j-1)

Court-Ordered
Placement

Unless a board and the juvenile board for the county in which a district's central administrative office is located have entered into a memorandum of understanding concerning the juvenile probation department's role in supervising and providing other support services for students in DAEP programs:

1. A court may not order a student expelled under Section 37.007 to attend a school district DAEP as a condition of probation;
2. A court may not order a student to attend a DAEP without a district's consent, until the student has successfully completed any sentencing requirements, if the court has ordered the student to attend a DAEP as a condition of probation once during a school year and the student is referred to juvenile court again during that school year.

Education Code 37.010(c)-(d)

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School Activities	Any court placement in a DAEP must prohibit the student from attending or participating in school-sponsored or school-related activities. <i>Education Code 37.010(e)</i>
Placement After Court Disposition	<p>After the student has successfully completed any court disposition requirements, including conditions of deferred prosecution or conditions required by the prosecutor or probation department, a district may not refuse to admit the student if the student meets the requirements for admission into the public schools. A district may place the student in the DAEP.</p> <p>Notwithstanding Education Code 37.002(d) [see FOA], the student may not be returned to the classroom of the teacher under whose supervision the offense occurred without that teacher's consent. The teacher may not be coerced to consent.</p> <p><i>Education Code 37.010(f)</i></p>
Not Guilty/ Insufficient Evidence/Charges Dropped	<p>The office of the prosecuting attorney or the office or official designated by the juvenile board shall, within two working days, notify the school district that removed a student to a DAEP under Education Code 37.006 if:</p> <ol style="list-style-type: none">1. Prosecution of a student was refused for lack of prosecutorial merit or insufficient evidence, and no formal proceedings, deferred adjudication, or deferred prosecution will be initiated; or2. A court or jury found the student not guilty or made a finding the child did not engage in delinquent conduct or conduct indicating a need for supervision and the case was dismissed with prejudice. <p>On receipt of the notice, the superintendent or designee shall review the student's placement in the DAEP. The student may not be returned to the regular classroom pending the review. The superintendent or designee shall schedule a review of the student's placement with the student's parent or guardian not later than the third class day after the superintendent or designee receives notice from the office or official designated by the court.</p> <p>After reviewing the notice and receiving information from the student's parent or guardian, the superintendent or designee may continue the student's placement in the DAEP if there is reason to believe that the presence of the student in the regular classroom threatens the safety of other students or teachers.</p> <p><i>Education Code 37.006(h); Code of Criminal Procedure 15.27(g)</i></p>

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Appeal After
Placement Upheld

The student or the student's parent or guardian may appeal a superintendent's decision to the board. The student may not be returned to the regular classroom pending the appeal. A board shall, at the next scheduled meeting, review the notice provided by the office of the prosecuting attorney or the office or official designated by the juvenile board; receive information from the student, the student's parent or guardian, and the superintendent or designee; and confirm or reverse the superintendent's decision. The board shall make a record of the proceedings.

If a board confirms the decision, the board shall inform the student and the student's parent or guardian of the right to appeal to the commissioner of education. The student may not be returned to the regular classroom pending the appeal to the commissioner.

Education Code 37.006(i)-(j)

120-Day Review of
Status

A student placed in a DAEP shall be provided a review of the student's status, including a review of the student's academic status, by a board's designee at intervals not to exceed 120 days. In the case of a high school student, the board's designee, with the student's parent or guardian, shall review the student's progress toward meeting high school graduation requirements and shall establish a specific graduation plan for the student. The district is not required to provide a course in the DAEP, except as required by Education Code 37.008(l). [See FOCA] At the review, the student or the student's parent or guardian must be given the opportunity to present arguments for the student's return to the regular classroom or campus. The student may not be returned to the classroom of the teacher who removed the student without that teacher's consent. The teacher may not be coerced to consent.

Education Code 37.009(e)

Additional
Proceedings

If, during the term of placement, a student engages in additional conduct for which placement in a DAEP or expulsion is required or permitted, additional proceedings may be conducted and the principal or board, as appropriate, may enter an additional order. *Education Code 37.009(j)*

Reporting

A district may include the number of students removed to a DAEP in its annual performance report. *Education Code 39.306(e)(5)* [See AIB]

Note: See FOF for provisions concerning students with disabilities.

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**Students Younger
Than 10**

A student younger than 10 years of age shall not be expelled but shall be placed in a disciplinary alternative education program (DAEP). *Education Code 37.007(e)(2), (h)*

Overage Students

A person who is 21 years of age or older and is admitted by a district for the purpose of completing the requirements for a diploma is not eligible for placement in a juvenile justice alternative education program (JJAEP) if the person engages in conduct that would require or authorize such placement for a student under the age of 21. If the student engages in such conduct, a district shall revoke the student's admission. *Education Code 25.001(b-1)*

Mandatory Expulsion
School Related

Subject to the requirements of Education Code 37.009(a) [see Pre-placement Proceedings, below], a student shall be expelled if the student, on or off of school property:

1. Engages in conduct that contains the elements of the offense of unlawfully carrying weapons under Penal Code 46.02 or elements of an offense relating to prohibited weapons under Penal Code 46.05 [see FNCG];
2. Engages in conduct that contains the elements of the offense of aggravated assault, sexual assault, aggravated sexual assault, arson, murder, capital murder, criminal attempt to commit murder or capital murder, indecency with a child, kidnapping, aggravated kidnapping, burglary, robbery, aggravated robbery, manslaughter, criminally negligent homicide, or continuous sexual abuse of a young child or disabled individual, as those offenses are defined in the Penal Code;
3. Commits a drug- or alcohol-related offense described at Education Code 37.006(a)(2)(C), if that conduct is punishable as a felony;
4. Engages in conduct that contains the elements of the offense of assault under Penal Code 22.01(a)(1) against a school district employee or volunteer as defined by Education Code 22.053; or
5. Engages in conduct that contains the elements of the offense of exhibiting, using, or threatening to exhibit or use a firearm under Education Code 37.125.

Education Code 37.007(a)

Exception

A student may not be expelled solely on the basis of the student's use, exhibition, or possession of a firearm that occurs:

1. At an approved target range facility that is not located on a school campus; and

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2. While participating in or preparing for a school-sponsored shooting sports competition or a shooting sports educational activity that is sponsored or supported by the Parks and Wildlife Department or a shooting sports sanctioning organization working with the department.

This section does not authorize a student to bring a firearm on school property to participate in or prepare for a school-sponsored shooting sports competition or a shooting sports educational activity.

Education Code 37.007(k), (l)

Federal Firearms
Offense

In accordance with the Gun-Free Schools Act, a district shall expel a student who brings a firearm, as defined by federal law, to school. The student must be expelled from the student's regular campus for a period of at least one year, except that the superintendent may modify in writing the length of expulsion in the case of an individual student.

Exception

This provision shall not apply to a firearm that is lawfully stored inside a locked vehicle on school property, or if it is for activities approved and authorized by the district and the district adopts appropriate safeguards to ensure student safety. [See also GKA].

*Provision of
Educational
Services*

A district or other local educational agency shall provide educational services to an expelled student in a DAEP if the student is younger than 10 years of age on the date of expulsion. A district or other local educational agency may provide educational services to an expelled student who is 10 years of age or older in a DAEP.

20 U.S.C. 7961; Education Code 37.007(e)

Definitions

For purposes of this provision:

School

"School" means any setting that is under the control and supervision of a district for the purpose of student activities approved and authorized by the district. *20 U.S.C. 7961(f)*

Firearm

"Firearm" means:

1. Any weapon (including a starter gun), which will or is designed to or which may readily be converted to expel a projectile by the action of an explosive;
2. The frame or receiver of any such weapon;
3. Any firearm muffler or firearm silencer; or
4. Any destructive device. "Destructive device" means any explosive, incendiary, or poison gas bomb, grenade, rocket having a propellant charge of more than four ounces, missile hav-

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ing an explosive or incendiary charge of more than one-quarter ounce, mine, or device similar to any of the preceding described devices. It also means any type of weapon (other than a shotgun shell or a shotgun that is generally recognized as particularly suitable for sporting purposes) by whatever name known which will, or which may be readily converted to, expel a projectile by the action of an explosive or other propellant, and which has any barrel with a bore of more than one-half inch in diameter; and any combination of parts either designed or intended for use in converting any device into a destructive device as described in this item, and from which a destructive device may be readily assembled.

18 U.S.C. 921, 20 U.S.C. 7961(b)(3)

**Discretionary
Expulsion**

Threats

A student may be expelled if the student engages in conduct involving a public school that contains the elements of the offense of false alarm or report under Penal Code 42.06, or terroristic threat under Penal Code 22.07.

School-Related
Conduct

A student may be expelled if the student, while on or within 300 feet of school property, as measured from any point on the school's real property boundary line, or while attending a school-sponsored or school-related activity on or off of school property:

1. Sells, gives, or delivers to another person, or possesses, uses, or is under the influence of any amount that is not punishable as felony of:
 - a. Marijuana or a controlled substance, as defined by Chapter 481, Health and Safety Code, or by 21 U.S.C. section 801 et seq.; or
 - b. A dangerous drug, as defined by Chapter 483, Health and Safety Code; or
 - c. An alcoholic beverage, as defined by Section 1.04, Alcoholic Beverage Code.
2. Engages in conduct that contains the elements of an offense relating to an abusable volatile chemical under Health and Safety Code 485.031-485.034.
3. Engages in conduct that contains the elements of the offense of deadly conduct under Penal Code 22.05.

Education Code 37.007(b)(1)-(2)

Possession of
Firearm Within 300
Feet of School

A student may be expelled if the student, while within 300 feet of school property, as measured from any point on the school's real property boundary line, engages in possession of a firearm, as de-

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fined by 18 U.S.C. sec. 921 [see Federal Firearm Offense, above].
Education Code 37.007(b)(3)

Bullying

A student may be removed from class and expelled if the student:

1. Engages in bullying that encourages a student to commit or attempt to commit suicide;
2. Incites violence against a student through group bullying; or
3. Releases or threatens to release intimate visual material of a minor or student who is 18 years of age or older without the student's consent.

Nothing in this provision exempts a school from reporting a finding of intimate visual material of a minor.

Definitions

Bullying

"Bullying" has the meaning assigned by Education Code 37.0832. [See FFI]

Intimate Visual
Material

"Intimate visual material" has the meaning assigned by Civil Practice and Remedies Code 98B.001.

Education Code 37.0052

Criminal Mischief

A district may use its discretion to expel a student who has engaged in conduct that contains the elements of criminal mischief, as defined in the Penal Code, if the conduct is punishable as a felony. Regardless of whether the student is expelled, a district shall refer the student to the authorized officer of the juvenile court.
Education Code 37.007(f)

Breach of Computer
Security

A student may be expelled if the student engages in conduct that contains the elements of the offense of breach of computer security under Penal Code 33.02 if:

1. The conduct involves accessing a computer, computer network, or computer system owned by or operated on behalf of a school district; and
2. The student knowingly alters, damages, or deletes school district property or information; or commits a breach of any other computer, computer network, or computer system.

Education Code 37.007(b)(4)

Serious
Misbehavior in
DAEP

A student placed in a DAEP who engages in documented serious misbehavior while on the DAEP campus despite documented behavioral interventions may be removed from class and expelled.

"Serious misbehavior" means:

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1. Deliberate violent behavior that poses a direct threat to the health or safety of others;
2. Extortion, meaning the gaining of money or other property by force or threat;
3. Conduct that constitutes coercion, as defined by Penal Code 1.07; or
4. Conduct that constitutes the offense of:
 - a. Public lewdness under Penal Code 21.07;
 - b. Indecent exposure under Penal Code 21.08;
 - c. Criminal mischief under Penal Code 28.03;
 - d. Personal hazing under Education Code 37.152; or
 - e. Harassment, under Penal Code 42.07(a)(1), of a student or district employee.

If the student is expelled, a board or its designee shall refer the student to the authorized officer of the juvenile court for appropriate proceedings under Family Code Title 3 (Juvenile Justice Code).

Education Code 37.007(c), .010(b)

**Consideration of
Virtual Education as
Alternative to
Expulsion**

Before a school district may expel a student, the district must consider the appropriateness and feasibility of, as an alternative to expulsion, enrolling the student in a full-time hybrid program, full-time virtual program, full-time hybrid campus, or full-time virtual campus. [See EHDE for definitions.] This requirement does not apply to a student expelled under Education Code 37.0081 or 37.007(a), (d), or (e). *Education Code 37.0071*

**Pre-placement
Proceedings**

Conference

Not later than the third class day after a student is removed by a teacher or by the school principal or other appropriate administrator, the campus behavior coordinator (CBC) or other appropriate administrator shall schedule a conference among the CBC or other appropriate administrator, the student's parent or guardian, the teacher removing the student from class, if any, and the student. At the conference, the student is entitled to written or oral notice of the reasons for the removal, an explanation of the basis for the removal, and an opportunity to respond to the reasons for the removal. The student may not be returned to the regular class pending the conference.

Mitigating Factors
Before Ordering
Removal

Before ordering removal, the CBC must consider whether the student acted in self-defense, the intent or lack of intent at the time the student engaged in the conduct, the student's disciplinary history, and whether the student has a disability that substantially im-

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pairs the student's capacity to appreciate the wrongfulness of the student's conduct, regardless of whether the decision of the behavior coordinator concerns a mandatory or discretionary action.

Order the
Placement

Following the conference, and whether or not each requested person is in attendance after valid attempts to require the person's attendance, the CBC, after considering any mitigating factors under Education Code 37.001(a)(4) [see FO], shall order the placement of the student for a period consistent with the Student Code of Conduct.

Education Code 37.009(a) [See Student Code of Conduct]

**Expulsion
Proceedings**

Due Process

Before a student may be expelled, a board or its designee shall provide the student a hearing at which the student is afforded appropriate due process as required by the federal constitution and which the student's parent or guardian is invited, in writing, to attend. *Education Code 37.009(f)*

The minimum procedural requirements necessary to satisfy due process depend upon the circumstances and the interests of the parties involved. Federal due process requires notice and some opportunity for hearing.

Notice

The notice should contain a statement of the specific charges and grounds that, if proven, would justify expulsion. In some cases, the student should be given the names of the witnesses against him or her and an oral or written report on the facts to which each witness testifies.

Hearing

The rights of the student may properly be determined upon the hearsay evidence of school administrators who investigate disciplinary infractions.

[See also *Brewer v. Austin Indep. Sch. Dist.*, 779 F.2d 260 (5th Cir. 1985); *Keough v. Tate Cnty. Bd. of Educ.*, 748 F.2d 1077 (5th Cir. 1984); *McClain v. Lafayette Cnty. Sch. Bd. of Educ.*, 673 F.2d 106 (5th Cir. 1982); *Tasby v. Estes*, 643 F.2d 1103 (5th Cir. 1981); *Boykins v. Fairfield Bd. of Educ.*, 492 F.2d 697 (5th Cir. 1974), cert. denied, 420 US 962 (1975); *Dixon v. Alabama State Bd. of Educ.*, 294 F.2d 150 (5th Cir. 1961), cert. denied, 368 U.S. 930 (1961)]

Representative

At the hearing, the student is entitled to be represented by the student's parent, guardian, or another adult who can provide guidance to the student and who is not an employee of the district. If a district makes a good-faith effort to inform the student and the student's parent or guardian of the time and place of the hearing, the district may hold the hearing regardless of whether the student, the student's parent or guardian, or another adult representing the student attends.

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Mitigating Factors Before Ordering Expulsion	Before ordering the expulsion of a student, the board or the board's designee must consider whether the student acted in self-defense, the intent or lack of intent at the time the student engaged in the conduct, the student's disciplinary history, and whether the student has a disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct, regardless of whether the decision of the board concerns a mandatory or discretionary action. [See Student Code of Conduct, item 4, at FO(LEGAL) for additional mitigating factors.]
Appeal	<p>If the decision to expel a student is made by the board's designee, the decision may be appealed to the board. The decision of the board may be appealed by trial de novo to a district court of the county in which the district's central administrative office is located.</p> <p><i>Education Code 37.009(f)</i></p>
Term of Expulsion	<p>If the period of expulsion is inconsistent with the guidelines on length of expulsion in the Student Code of Conduct, the order must give notice of the inconsistency.</p>
Beyond One Year	<p>The period of expulsion may not exceed one year unless a district determines that:</p> <ol style="list-style-type: none">1. The student is a threat to the safety of other students or to district employees; or2. Extended placement is in the best interest of the student. <p><i>Education Code 37.009(h)</i></p>
Notice of Expulsion Order	<p>A board or its designee shall deliver a copy of the order expelling the student to the student and the student's parent or guardian. After such notification, the parent or guardian shall provide adequate supervision for the student during the period of expulsion. <i>Education Code 37.009(g)-(h)</i></p>
To Parent or Guardian	
To Court	<p>Not later than the second business day after the date an expulsion hearing is held, a board or its designee shall deliver a copy of the expulsion order and any information required under Family Code 52.04 to the authorized officer of the juvenile court in the county in which the student resides.</p> <p>Family Code 52.04 requires the following information from a referring entity that is not a law enforcement agency or has not taken the child into custody:</p> <ol style="list-style-type: none">1. All information in a district's possession pertaining to the identity of the child and the child's address; the name and address of the child's parent, guardian, or custodian; the names and

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addresses of any witnesses; and the child's present whereabouts; and

2. A complete statement of the circumstances of the alleged delinquent conduct or conduct indicating a need for supervision.

Education Code 37.010(a); Family Code 52.04(a), .041(a)-(b)

To Juvenile Board

In a county that operates a JJAEP [see FODA], no student shall be expelled without written notification by a board or its designee to the juvenile board's designated representative. The notification shall be made not later than two business days following a board's determination that the student is to be expelled. Failure to timely notify the designated representative shall result in the child's duty to continue attending a district's educational program, which shall be provided to that child until such time as the notification to the designated representative is properly made. *Family Code 52.041*

To Staff

In addition to providing any notice required under Code of Criminal Procedure 15.27 [see GRA], a district shall inform each educator who has responsibility for, or is under the direction and supervision of an educator who has responsibility for, the instruction of a student who has engaged in expellable conduct.

Each educator shall keep the information confidential from any person not entitled to the information, except that the educator may share the information with the student's parent or guardian as provided by state or federal law. An educator's certificate may be suspended or revoked for intentional failure to keep such information confidential.

Education Code 37.007(g)

**Completion of
Proceeding Upon
Withdrawal**

If a student withdraws from a district before an order for expulsion is entered, the principal or board, as appropriate, may complete the proceedings and enter an order. If the student subsequently enrolls in the district during the same or subsequent school year, the district may enforce the order at that time except for any period of the expulsion that has been served by the student in another district that honored the order. If the principal or board fails to enter an order after the student withdraws, the next district in which the student enrolls may complete the proceedings and enter an order. *Education Code 37.009(i)*

**Additional
Proceedings**

If, during the term of expulsion, a student engages in additional conduct for which placement in a DAEP or expulsion is required or permitted, additional proceedings may be conducted and the principal or board, as appropriate, may enter an additional order. *Education Code 37.009(j)*

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Appeals

A decision by a board's designee to expel a student may be appealed to the board. If the hearing is not before the board directly, the results and findings of the hearing should be presented in a report open to the student's inspection. *Education Code 37.009(f)*; *Dixon v. Alabama State Bd. of Educ.*, 294 F.2d 150 (5th Cir. 1961), cert. denied, 368 U.S. 930 (1961)

**Restrictions on
Court Orders**

A court may not order an expelled student to attend a regular classroom, a regular campus, or a district DAEP as a condition of probation.

Exception

A court may order a student to attend a regular classroom, a regular campus, or a district DAEP if the district has entered into a memorandum of understanding (MOU) with the juvenile board for the county in which the district's central administrative office is located, concerning the juvenile probation department's role in supervising and providing other support services for students in DAEPs.

Education Code 37.010(c)

**District
Responsibility for
Expelled Student**

Students Not
Eligible for Existing
JJAEP

In a county that operates a JJAEP, a district is responsible for providing an immediate educational program to a student who engages in behavior for which expulsion is permitted but not required under Education Code 37.007, but who is not eligible for admission into the JJAEP in accordance with an MOU. [See FODA]

*Contracting for
Services*

A district may provide the program, or the district may contract with a county juvenile board, a private provider, or one or more other school districts to provide the program.

Education Code 37.011(l)

Certain Districts

This provision applies to a district located in a county considered to be a county with a population of 125,000 or less because it has a population of more than 200,000 and less than 233,500; has five or more school districts located wholly within the county's boundaries; and has located in the county a JJAEP that, on May 1, 2011, served fewer than 15 students. A qualifying district shall provide educational services to a student who is expelled from school. The district is entitled to count the student in the district's average daily attendance for purposes of receipt of state funds under the Foundation School Program. An educational placement under this section may include:

1. The district's DAEP.
2. A contracted placement with another school district, an open-enrollment charter school, an institution of higher education,

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an adult literacy council, or a community organization that can provide an educational program that allows the student to complete the credits required for high school graduation.

An educational placement other than a district's DAEP is subject to the educational and certification requirements applicable to an open-enrollment charter school under Education Code Chapter 12, Subchapter D.

Education Code 37.011(a-3)-(a-5)

Return to Class

Early / Permissive

On the recommendation of the placement review committee, or on its own initiative, a district may readmit an expelled student while the student is completing any court disposition requirements.

Required

After an expelled student has successfully completed any court disposition requirements, including conditions of a deferred prosecution, or conditions required by the prosecutor or probation department, a district may not refuse to admit the student if the student meets the requirements for admission. [See FD] A district may place the student in a DAEP.

The student may not be returned to the classroom of the teacher under whose supervision the offense occurred without that teacher's consent. The teacher may not be coerced to consent.

Education Code 37.010(f)

**Expelled from
Another District**

If a student has been expelled from another school district, the expelling district shall provide to a district in which the student enrolls a copy of the expulsion order and the referral to the authorized officer of the juvenile court. A district in which the student enrolls may continue the expulsion under the terms of the order, may place the student in a DAEP for the period specified by the expulsion order, or may allow the student to attend regular classes without completing the period of expulsion.

Out-of-State
Expulsion

A district may take any of the above actions if the student was expelled by a district in another state if:

1. The out-of-state district provides a copy of the expulsion order; and
2. The grounds for the expulsion are also grounds for expulsion in the district in which the student is enrolling.

Education Code 37.010(g)

If the student was expelled for more than one year and the enrolling district continues the expulsion or places the student in a

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DAEP, the aggregate period of expulsion or placement may not exceed one year unless the district determines that:

1. The student is a threat to the safety of other students or to district employees; or
2. Extended placement is in the best interest of the student.

Education Code 37.010(g-1)

Note: See FOF for provisions concerning expulsion of students with disabilities.

**Virtual Expulsion
Program**

The principal or other appropriate administrator may place a student who has been expelled under Education Code 37.007 or 37.0081 in a virtual expulsion program established by the district and provide virtual instruction and instructional materials for remote learning to the student only if:

1. The district is located in a county that operates a JJAEP or the school district contracts with the juvenile board of another county for the provision of a JJAEP, and the JJAEP rejects admission of the student or returns the student before the expiration of the discipline assignment; or
2. The district is not located in a county that operates a JJAEP and does not contract with the juvenile board of another county for the provision of a JJAEP.

A school district must ensure that, to the extent practicable in a virtual setting, the district's virtual expulsion program complies with the requirements for a disciplinary alternative education program under Education Code 37.008. [See FOC]

**Equipment and
Internet**

If the principal or other appropriate administrator places a student in a virtual expulsion program under this section, the school district shall ensure that the student has suitable computer equipment and internet access and provide the computer equipment and internet access if necessary.

**Review of
Placement**

The principal or other appropriate administrator shall review the placement of a student in a virtual expulsion program at least once every 45 school days after the date the placement begins to determine if continued placement in the program is appropriate. The review must consider whether a position for the grade level in which the student is enrolled has become available in an in-person setting in a JJAEP. If the principal or other appropriate administrator determines that such a position has become available, the district shall plan for the student's transition to an in-person setting as

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soon as practicable. If the principal or other appropriate administrator determines that continued placement is appropriate, the principal or other appropriate administrator shall document the determination.

Funding

A student placed in a virtual expulsion program shall be counted toward the district's average daily attendance for purposes of receipt of state funds under the Foundation School Program if the district can confirm the student's daily attendance in the virtual expulsion program.

The commissioner of education shall adopt rules providing for a method of taking attendance for students placed in a virtual expulsion program.

Teachers

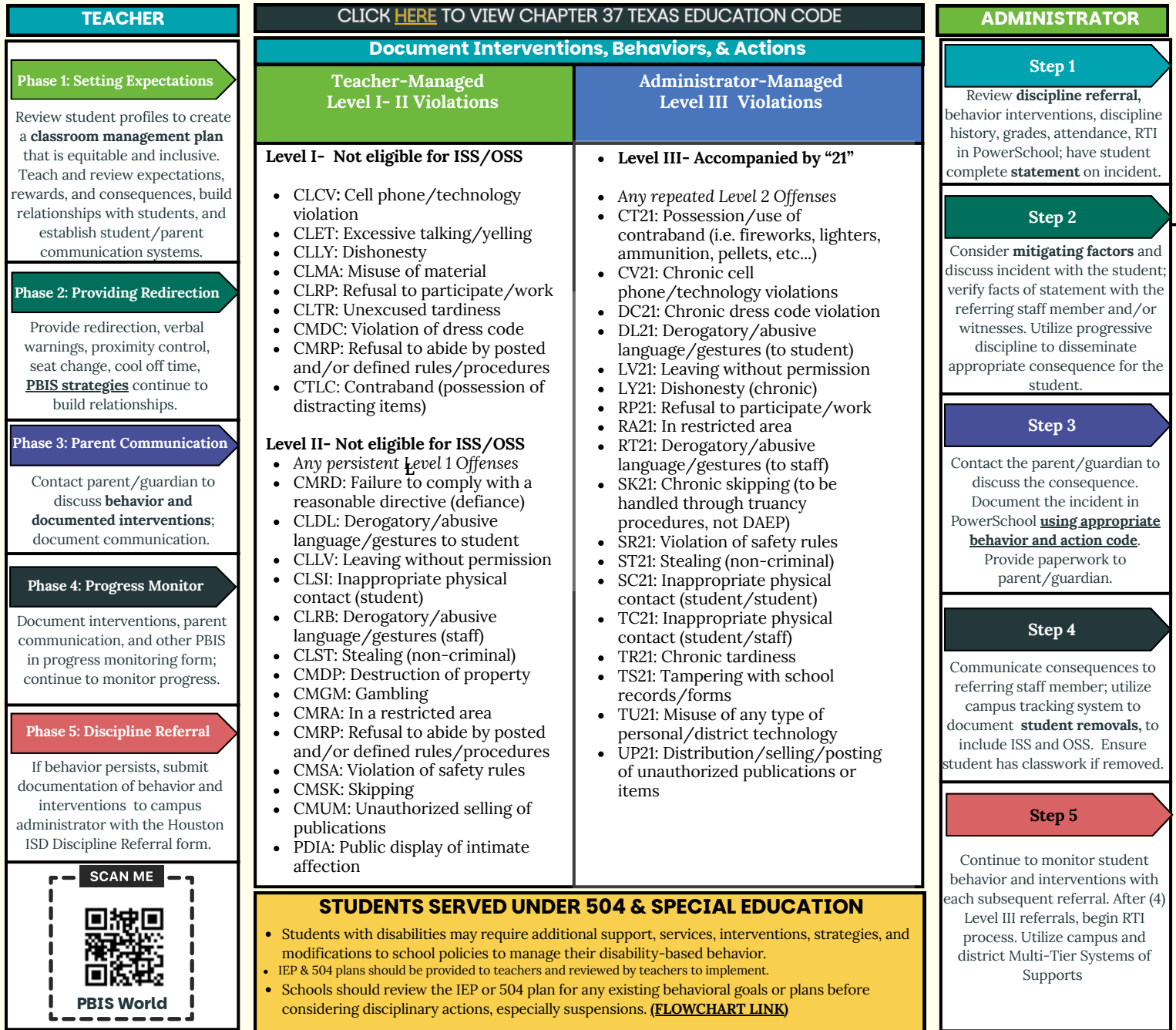
A district may not require a teacher who provides virtual instruction to students in a virtual expulsion program to provide virtual instruction and in-class instruction for a course during the same class period. A teacher may not provide instruction for a virtual expulsion program course unless the teacher has completed a professional development course on virtual instruction.

The commissioner of education shall adopt rules requiring districts to provide basic professional development training for teachers providing instruction in a virtual expulsion program.

Education Code 37.0083

Administrator Discipline Process Flow Chart

The flowchart below provides guidance for classroom and campus discipline procedures



SCAN ME



PBIS World

-ADMINISTRATIVE ACTIONS USE-

Mitigating factors to consider include: -Was it self-defense? (TEC §37.001) - Was there intent or lack of intent at the time the student engaged in the conduct? (TEC §37.001) - What is the student's disciplinary history? (TEC §37.001) - How does the student's age developmentally impact their understanding of inappropriate behavior? -Is there a disability that substantially impairs the student's capacity to appreciate the wrongfulness of the student's conduct? (TEC §37.001) -Is student's status identified as a student who is homeless? (TEC §37.001) - Has the student been afforded the opportunity for behavioral interventions to be implemented?- What is the safety and/or risk factors of inappropriate behavior?

PowerSchool Actions Level I and II - (Local) +

- CALL: Parent contact by phone
- PCON: Parent conference
- ASCO: Administrator/student or parent conference
- DENT: Detention
- ASPC: Administrator/student/parent conference
- BUSP: Removal of bus privileges
- EXCL: Exclusion from extracurricular activities

+It is campus discretion to utilize these local actions for Level III -IV Violations of Code of Conduct

PowerSchool Actions Level III (PEIMS- Reported)

- 05: Out of School Suspension
- 06: In School Suspension
- 25: Partial Day OSS
- 26: Partial Day ISS

PowerSchool Options DAEP (PEIMS- Reported)

- 07: Placement DAEP After Conference
- 08: Continuation other LEA DAEP

PowerSchool Options Expulsion (PEIMS- Reported)

- 02: Expulsion w/ placement in JJAEP Formal
- 04: Expulsion placement off campus DAEP Formal
- 09: Continuation other LEA Expulsion

PowerSchool Actions (Not Commonly Utilized)

- 01: Expulsion w/o placement after formal hearing
- 03: Expulsion placement on- campus DAEP formal
- 10: Continuation of LEA DAEP from prior year
- 11: Continuation of LEA Expulsion from prior year
- 12: Continuation of LEA JJAEP Expulsion prior year
- 13: Placement JJAEP by Court Order
- 14: Placement in DAEP by Court Order
- 15: Continuation other LEAP JJAEP
- 16: Truancy charges filed and fine assessed
- 17: Truancy charges filed no fine assessed



Campus Conducts a Thorough Investigation of Discipline Incident for all Discipline Incidents

Administrator-Managed Level IV Violations (* Need Police File #) Discretionary DAEP- Chronic Violations	Administrator-Managed Level V Violations- (* Need Police File #) Mandatory DAEP	Administrator-Managed Level V Violations- (Need Arrest Notification) Mandatory JJAEP
<ul style="list-style-type: none"> Bullying Offenses Based on Reason: <ul style="list-style-type: none"> (BA21, BB21, BD21, BE21, BG21, BR21, BS21) 61: Bullying HZ21: Hazing* HI21: Pressuring, hassling, badgering HA21: Dating violence/ harassment - Title IX* HS21: Sexual Harassment- Title IX* AC21: Assault by contact (staff)* AS21: Assault by contact (student)* AV21: Verbal assault or threat less than a terroristic threat* BK21: Brass knuckles* CR21: Chronic/persistent misbehavior^ DD21: OTC meds possession/distribution* DF21: Chronic failure to adhere to directives (defiance) DR21: Drug paraphernalia* DS21: Destruction of property* DU21: Possession/distribution of unauthorized prescription* GG21: BB/air/pellet/stun gun with intent* GM21: Chronic gambling* GN21: Gang activity* LT21: Hit list* KN21: Possession of non location restricted knife (blade less than 5.5 inches)* MC21: Misdemeanor Criminal Mischief* MT21: Misdemeanor theft* PD21: Chronic/inappropriate PDA (4 or more incidents) PS21: Discharging mace/pepper spray (no assault charge)* RG21: Replica of a gun* SB21: Chronic bus violations SD21: Unauthorized protests, demonstrations that disrupts school activities* TB21: Other Tobacco/Nicotine WP21: Weaponizing Objects 01: Permanent Teacher Removal 10: Non-Title 5 Felony Committed Off Campus 22: Criminal Mischief (felony only)* 23: Emergency Placement/ExpulsionTEC §37.019: May be a single incident. 41: Fighting/Mutual Combat* 49: Deadly Conduct* 56: Student Is Required to Register as A Sex Offender Under Chapter 62 Of The Code Of Criminal Procedure And Is Not Under Court Supervision* 58: Breach of Computer Security 59 Serious Misbehavior while placed in a DAEP - (Discretionary Expulsion) 65: Threatens immediate health and safety of other students in classroom TEC §37.005(c)(2) 66: Documented repeated or significant disruption to the classroom - TEC §37.005(c)(3) 67: Possesses or uses e-cigarette - TEC §37.001(a)(2), TEC §37.006(d)(1)(C) Defined under Health and Safety 	<ul style="list-style-type: none"> SR21- Propping of doors (Changing of code pending) - Prop open any secure school doors including but not limited to exterior doors, emergency exits and temporary building doors allowing unauthorized individuals in building (Please contact OSD if you are entering this code) BP21: Bypassing weapon detection systems (Please contact OSD if you are entering this code) 02: Conduct punishable as a felony* 05: Possessed, sold, used, or was under the influence of an alcoholic beverage* 06: Abuse of a volatile chemical* 07: Public lewdness or indecent exposure* 09: Based on conduct occurring off campus and while the student is not in attendance at a school-sponsored or school-related activity for felony offenses in Title 5, Penal Code* 26: Terroristic threat* (LINK to Protocol) 28: Assault against someone other than a school district employee or volunteer under Penal Code* 35: False Alarm/False Report* 55: Student Is Required to Register As A Sex Offender Under Chapter 62 Of The Code Of Criminal Procedure And Is Under Court Supervision* 62: Possessed, Sold, Gave, Used, Delivered, Or Was Under the Influence of Marihuana or Tetrahydrocannabinol (THC) - TEC 37.006(a)(2)(C-1) 64: Possessed, Sold, Gave, Used, Delivered, Or Was Under the Influence of Other Controlled Substance* 68: Sells, gives, or delivers e-cigarette - TEC §37.006(a)(2)(C-2) Defined under Health and Safety Code, §161.081 69: Disorderly conduct involving a firearm - TEC §37.006(c)(1)(D) Defined under Penal Code, §42.01(a)(7) or (8) (Off-Campus) 70: Disruptive activities under TEC §37.123 - TEC §37.006(d)(1)(A) 71: Disruption of classes under TEC §37.124 - TEC §37.006(d)(1)(A)- Alone or with others, intentionally disrupts school classes or activities by: • emitting noise of intensity that prevents or hinders classroom instruction; attempting to or enticing a student away from a class or school activity that the student is required to attend; • preventing or attempting to prevent a student from attending a class or other school activity that the student is required to attend; and entering a classroom without the consent of either the principal or the teacher and, through either acts of misconduct or the use of loud or profane language, disrupting class activities 74: Retaliation against a school employee or volunteer of the district - TEC §37.006(b) Defined under Penal Code, §36.06 75: Harassment against an employee or volunteer of the district - TEC 37.006(b); Defined under Penal Code, §42.07 	<ul style="list-style-type: none"> 12: Unlawful Carrying of a Location-restricted Knife (Location-restricted Knife - blade longer than 5.5 inches)* 14: Conduct Containing the Elements of an Offense Relating to Prohibited Weapons* 15: Arson (Felony are JJAEP) 17: Murder, capital murder, criminal attempt to commit murder, or capital murder, Murder, capital murder, criminal attempt to commit murder, or capital murder* 18: Indecency with a child* 19: Aggravated kidnapping* 27: Assault against a school district employee or volunteer- TEC §37.007(a)(4) Defined under Penal Code, §22.01(a)(1) 29: Aggravated assault against a school district employee or volunteer* 30: Aggravated assault against someone other than a school district employee or volunteer* 31: Sexual assault or aggravated sexual assault against a school district employee or volunteer* 32: Sexual assault or aggravated sexual assault under against someone other than a school district employee or volunteer* 36: Felony Controlled Substance Violation* 47: Manslaughter* 48: Criminally Negligent Homicide* 57: Continuous Sexual Abuse Of Young Child Or Disabled Individual* 72: Kidnapping - TEC §37.007(a)(2)(E) Defined under Penal Code, §22.03 73: Exhibits, uses, or threatens to exhibit or use a firearm under TEC §37.125 - TEC §37.007(a)(5) 76: Burglary/Robbery, Aggravated Robbery- TEC §37.007(a)(2)(F) Defined under Penal Code, §§30.02, 29.02, and 29.03 <div data-bbox="1128 1396 1485 1785"> <p>SCAN HERE</p> </div> <p>Office of Student Discipline Resource Hub Requires Houston ISD Sign in</p>

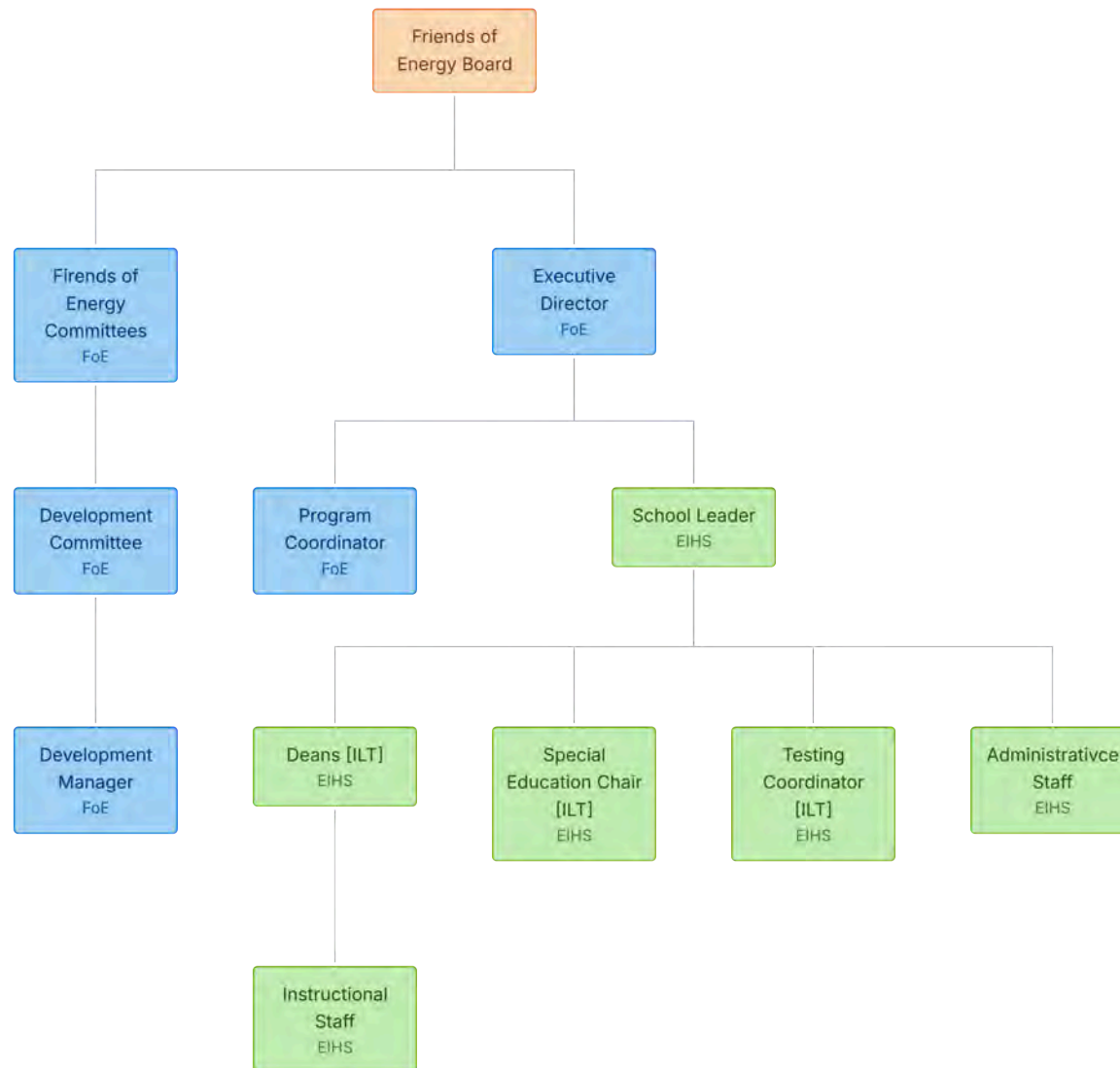
^ Discretionary DAEP Criteria: (CR21)

8 or more documented Level III or IV referrals (skipping or truancy- not allowable offenses), progression of interventions and discipline options (all available campus resources have been utilized to correct or identify issues/concerns), documented evidence of at least 3 weeks of behavioral RTI (SAF referral, MTSS, RTI, IAT, PBIS, BIP), approval of Division CTM for the Office of Student Discipline



ENERGY INSTITUTE

Organizational Chart





ENERGY INSTITUTE

Board Documents

Table of Content

- I. Friends of Energy By-Laws
- II. Code of Ethics & Conflict of Interest Policy
- III. Statement of Assurances

Proposed Friends of Energy
Code of Ethics and Conflict of Interest Policy
[will vote to approve end of January]

Article I. Purpose

The purpose of this Code of Ethics and Conflict of Interest Policy is to promote the highest ethical standards and ensure that the organization's operations and decisions are conducted with integrity, transparency, and accountability. Members of the Board of Directors, officers, employees, and volunteers must act in the best interests of the organization and avoid personal, professional, or financial conflicts that could impair their objectivity or loyalty.

Article II. Ethical Standards

All representatives of the organization shall:

1. Conduct themselves with honesty, fairness, and integrity in all organizational matters.
2. Uphold the organization's mission and act in furtherance of its charitable purposes.
3. Exercise responsible stewardship over all resources entrusted to the organization.
4. Maintain confidentiality of proprietary, personal, or sensitive information obtained through organizational activities.
5. Avoid any conduct that could reasonably be perceived as unethical or damaging to the organization's reputation.
6. Comply with all applicable laws, regulations, and organizational policies.

Article III. Conflicts of Interest

Substantial Interest

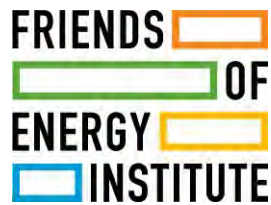
1. "Business entity" means a sole proprietorship, partnership, firm, corporation, holding company, joint-stock company, receivership, trust, or any other entity recognized by law.
2. A board member, officer, or key employee has a substantial interest in a business entity if:
 - a. The person owns:
 - i. Ten percent or more of the voting stock or shares of the business entity, or
 - ii. Either ten percent or more or \$15,000 or more of the fair market value of the business entity; or
 - b. Funds received by the person from the business entity exceed ten percent of the person's gross income for the previous year.
 - c. If the board member is related in the first degree by consanguinity or affinity has a substantial interest in the business entity.
3. A board member, officer, or key employee has a substantial interest in real property if the interest is an equitable or legal ownership with a fair market value of \$2,500 or more.

Duty to Disclose

1. If a board member, officer, or key employee has a substantial interest in a business entity or in real property, the official shall file, before a vote or decision on any matter involving the business entity or the real property, an affidavit stating the nature and extent of the interest and shall abstain from further participation in the matter if:
 - a. In the case of a substantial interest in a business entity, the action on the matter will have a special economic effect on the business entity that is distinguishable from the effect on the public; or
 - b. In the case of a substantial interest in real property, it is reasonably foreseeable that an action on the matter will have a special economic effect on the value of the property, distinguishable from its effect on the public.
2. The affidavit must be filed with the official recordkeeper of the organization.
3. The board shall take a separate vote on any budget item specifically dedicated to a contract with a business entity in which a board member has a substantial interest. The board member may not participate in that separate vote.

Article IV. Nepotism

A board member, officer, or key employee may not appoint a person to a position that is to be directly or indirectly compensated from public funds if the person is related to the board member, officer, or key employee by consanguinity (blood) within the third degree or by affinity (marriage) within the second degree.



Bylaws of Friends of Energy Institute, Inc

ARTICLE I: GENERAL PROVISIONS

Section 1. Name

The name of this organization shall be Friends of Energy Institute, Inc. (hereinafter “Friends of EIHS”). These bylaws govern the affairs of Friends of EIHS.

Section 2. Purpose

1.02.a The purpose of Friends of EIHS is to cultivate support for Energy Institute High School in order to enhance educational, professional, networking and energy and STEM opportunities for past, current and future students of EIHS.

1.02.b All activities and policies of the Friends of EIHS are established to maintain a tax-exempt status pursuant to section 501(c)(3) of the Internal Revenue Code.

1.02.c Friends of EIHS shall be noncommercial, nonsectarian, and nonpartisan.

ARTICLE II: MEMBERSHIP

Friends of EIHS shall have a Board of Directors and an Advisory Committee, as may be established by the Board of Directors.

Section 1: Board of Directors

2.01.a The affairs of Friends of EIHS shall be managed by its Board of Directors.

2.01.b The number of members of the Board of Directors shall not be less than three (3) nor more than fifteen (15). Each member of the Board of Directors shall serve a term of two (2) years, except as otherwise provided in this Article.

2.01.c Members of the Board of Directors may be re-elected for additional terms, provided that no director may serve for more than three (3) consecutive terms. The party interested in re-election must state their interest and the Board of Directors shall vote in accordance with 2.01.g.

2.01.d Parties interested in joining the Board of Directors will complete and submit the Application for Prospective Candidates. The Board of Directors shall review the application and vote in accordance with

2.01.e Members of the Board of Directors shall submit a letter of resignation, whether they are resigning during or at the end of their term.

2.01.f Members of the Board of Directors shall not be currently employed or contracted with Energy Institute or HISD. Current Energy Institute parents may serve on the Board of Directors,

but may not serve in an officer's position while having a student currently enrolled at the school.

2.01.g The Board of Directors shall meet a minimum of five (5) times per calendar year. Meetings will be held at a time and place to be decided by the Board of Directors. Members of the Board of Directors shall attend a minimum of 60% of scheduled meetings each fiscal year or be subject to removal as described in 2.02.c.

2.01.h Members of the Board of Directors shall contribute to the organization's overall fundraising success, as indicated in the Board Fundraising Policy or be subject to removal as described in 2.02.c.

2.01.i The presence of a majority of the members of the Board of Directors shall constitute a quorum for the transaction of business at any meeting of the Board of Directors.

2.01.j Any vacancy occurring on the Board of Directors may be filled by the Board of Directors at any regular or special meeting of the Board of Directors. A member of the Board of Directors elected to fill a vacancy for the unexpired term of his/her predecessor in office for less than one (1) year will be eligible to serve up to three (3) consecutive years.

2.01.k Members of the Board of Directors shall not receive any salaries for their services to Friends of EIHS.

2.01.l The Board of Directors shall keep regular minutes of its proceedings.

2.01.m The board of directors shall not include as members any individuals currently serving on the district's Board of Trustees, the district Superintendent, or any employees of the district who are involved in the selection, negotiation, management, or oversight of the district-charter partnership. Individuals who hold any of these positions are ineligible for membership.

Section 2: Officers on the Board of Directors

2.02.a The officers of the Board of Directors for Friends of EIHS shall be a Chair, Chair Emeritus, Vice Chair, Treasurer and Secretary. The Board of Directors may elect or appoint other such officers as it may deem desirable, including but not limited to one or more Vice Chairpersons.

2.02.b Any officer may be removed by a vote of quorum of the Board of Directors after any grievance procedure has been exhausted. Notice of removal shall be given in writing to the removed officer by the Secretary or Chairperson not more than ten (10) days subsequent to such action.

2.02.c The **CHAIR** of the Board of Directors shall have general oversight of the affairs of Friends of Energy, preside at meetings and lead the Board in decision making. The administrative duties of the Chair may be delegated to the Development Coordinator. The Chair may appoint and commission, with the consent of the Board, standing committees, task forces, and their respective Chairpersons.

The Chair will meet with the Development Coordinator on a monthly basis to review completed and upcoming work.

The Chair will be consulted on activities of subcommittees, informed of all monetary

transactions, and will be kept informed of new and current organizational initiatives.

The Chairperson shall have such powers and perform such duties as are vested in the Chairperson by these Bylaws and such other powers and duties as prescribed by the Board of Directors.

2.02.e The **CHAIR EMERITUS** shall serve for two years following his/her term as Chair as a member of the board. The Chair Emeritus will be recognized as an Executive Committee position.

2.02.f The **VICE CHAIR** shall lead in the absence of a Chair and shall have all the powers of and be subject to all the restrictions of the chair. The Vice Chair is the Chair-Elect of the organization and remains a Friends of Energy member in good standing.

The Vice Chair shall serve as Chairperson of the Advisory Committee, and oversee the operations of core programming.

2.02.g The **TREASURER** shall be responsible for coordinating the financial activities of Friends of EIHS and reporting to the Board of Directors at each Board of Directors meeting the financial status and condition of Friends of EIHS. The Treasurer shall comply with guidelines as expressed in Article III of these By-Laws.

2.02.h The **SECRETARY** shall keep a record of attendance and minutes of all the Board of Directors and Advisory Committee meetings; keep a register of the address and email addresses of each member of the Board of Directors and Advisory Committee, and perform all duties pertaining to the office of Secretary and such other duties as may be assigned by the Chairman of the Board of Directors.

Section 3: Advisory Committee

2.03.a There shall be an Advisory Committee within Friends of Energy. The Advisory Committee shall provide advice to the Board of Directors in a non-voting capacity.

2.03.b Membership on the Advisory Committee shall be open to all individuals who are recommended to and approved by the Board of Directors. Friends of Energy will endeavor to maintain at least fifteen (15) members of the Advisory Committee.

2.03.c The Advisory Committee shall endeavor to meet a minimum of twice a year at a time and place to be determined by the Board of Directors.

2.03.d The Advisory Committee members shall not receive any salaries for their services to Friends of EIHS.

ARTICLE III: FINANCES

Section 1: Money Handling

3.01.a The fiscal year of this organization shall begin on July 1 and end on June 30. An audit of the books and records of Friends of EIHS shall be conducted annually by the end of the fiscal year. The audit report shall be presented to the Board of Directors within thirty (30) days of its completion. The audit can be waived pending a majority vote by the Board of Directors and replaced by an internal review conducted by a member of the Board of Directors other than the

Treasurer.

3.01.b All income to the Friends of EIHS must be documented and deposited within one week of receipt. In extenuating circumstances, the Treasurer can extend that deadline with approval by the Chairperson.

3.02.c Cash Receipts - The Development Coordinator receives incoming checks, endorses them "for deposit only" and deposits within 5 business days. A copy of the check, deposit confirmation, and the account allocation for each deposit is filed on the shared drive by date and a copy is sent to the Treasurer to attach to the bank statement. All cash received is immediately counted, verified by the Treasurer or other available Board Member and immediately posted using the appropriate account allocation. A receipt will be given to the paying party and a copy kept for internal purposes. The cash shall be deposited within 24 hours.

3.01.d Reimbursements for all expenses shall be submitted to the Treasurer within thirty days of the incurred expense. A receipt must accompany all reimbursements and a Friends of EIHS check request form. The Development Coordinator reviews all requests for payment; verifies expenditure and amount is in accordance with budget; provides or verifies appropriate allocation information; prints checks according to allocation and payment date; and files backup documentation.

3.01.e The Chairperson, Treasurer, and Secretary will have check signing privileges. The Development Coordinator will have check writing privileges. Expenses under \$1000 require one signature, and expenses over \$1,000 require two signatures. No signatory may sign off on any check to his or herself. There shall be no pre-signed checks.

3.01.f Bank debit cards are to remain in the possession of the Treasurer and Chairperson and all charges made to the debit card must be pre-approved by the Treasurer. All charges greater than \$1,000 must be approved by the Treasurer and the Chairperson.

Section 2. Books and Records

Friends of EIHS shall keep correct books and records of accounts, records of attendance, and the minutes of the proceedings of the Board of Directors and Advisory Committee meetings. Friends of EIHS shall keep an accurate record of names, addresses, and email addresses of the Board of Directors and Advisory Committee members.

Section 3. Financial Policy and Procedures

The purpose of this policy is to describe accounting policies and procedures currently in use at Friends of Energy Institute, Inc., and to ensure that the financial statements conform to generally accepted accounting principles; assets are safeguarded; guidelines of grantors and donors are complied with; and finances are managed with accuracy, efficiency, and transparency.

3.03.a Financial Roles: The BOARD OF DIRECTORS reviews and approves Annual Budget; reviews annual and periodic financial statements and information; appoints two members of the Board to be authorized signers on the bank account(s) (the Board Treasurer and one other); appoints two members of the Board to be viewers on the accounting system and digital bank account (the Board Chairperson and Secretary); reviews and approves all non-budgeted

expenditures over \$500; reviews and advises on internal controls and accounting policies and procedures; determines when the organization should have an audit and, if so, chooses and contracts with the auditor.

3.03.b Financial Roles: The Board Treasurer has access to the digital bank account, opens all bank statements, reviews for any irregularities, and completes monthly bank reconciliations; attaches completed bank reconciliations to the applicable bank statement, along with supporting documentation; is primary administrator for overall data entry into accounting system and integrity of accounting system data; reviews and manages cash flows; reviews, revises, and maintains internal accounting controls and procedures; approves inter-account bank transfers; maintains general ledger; prepares monthly and year-end financial reports (balance sheet, income statement, budget versus actual report, and any other requested reports); explains budget variances.

3.03.c Financial Roles: The DevelopmentCoordinator develops organizational budget annually; writes and reviews issued checks, except those for which the DevelopmentCoordinator is a payee; monitors program budgets; is company administrator for overall data entry into accounting system and integrity of accounting system data reviews and approves reimbursements and fund requests; reviews incoming and outgoing invoices; prepares and files grant submissions; monitors grant reporting and appropriate release of restricted funds; initiates donor thank you letter acknowledgements; manages expenses within the parameters of the approved budget, reporting to the Treasurer and Board on variances and the reason for these variances; oversees the adherence to internal controls.

3.03.d Receipts - Written confirmation of single contributions over \$250 must be provided to donors and include the following: organization name; donation date; donation amount; description of non-cash contribution (but not a valuation); and statement that no goods or services were provided in return for the contribution.

ARTICLE IV: AMENDMENTS OF BYLAWS

These Bylaws may be altered, amended or repealed and new Bylaws may be adopted by a majority of the members of the Board of Directors present at any regular meeting or at any meeting of the Board of Directors, if at least five (5) days written notice is given of an intention to alter, amend or repeal these bylaws at such a meeting. The Board of Directors shall endeavor to review these Bylaws no less than every four (4) years.

ARTICLE V: DISSOLUTION

5.01.a The Friends of EIHS may be dissolved provided thirty days' notice is given to the Friends of EIHS Advisory Committee membership, a vote is taken with a quorum present, and the vote is approved by a majority of those present.

5.01.b Upon dissolution of the Friends of EIHS, the remaining funds shall first be used to pay all outstanding debt. The Board of Directors then shall determine by a majority vote how to spend the remaining funds.

ARTICLE VI: INDEMNIFICATION

6.01.a General Friends of EIHS shall indemnify persons who serve or have served on the Board of Directors, both in their official capacities and as a delegate, against any and all liability and expenses that may be incurred by them in connection with or resulting from any proceeding to the full extent permitted or required by applicable law.

Friends of EIHS shall pay or reimburse, in advance of the final disposition of the proceeding, to each present or former member of the Friends of EIHS Board of Directors all reasonable expenses incurred by such person who was, is, or is threatened to be made a respondent in a proceeding to the full extent permitted by applicable law.

Friends of EIHS may pay or reimburse, in advance of the final disposition of the proceeding, to each present or former member of the Friends of EIHS Board of Directors, all reasonable expenses incurred by such person who was, is or is threatened to be made a respondent in a proceeding upon Friend of EIHS's receipt of an affirmation and an undertaking of the kinds described in Section 8.104(a) of the Texas Business Organizations Code (the "Code") on such terms as Friends of EIHS considers appropriate.

The rights of indemnification provided for in this Article VI shall be in addition to all rights to which any Corporate Functionary may be entitled under any agreement or as a matter of law or otherwise. Terms used in this Article VI that are defined in Section 8.001 of the Code are used as so defined.

6.01.b Insurance Friends of EIHS may purchase or maintain insurance on behalf of any Corporate Functionary against any liability or expense asserted against him and incurred by him in such a capacity or arising out of his status as a Corporate Functionary, whether or not Friends of EIHS would have the power to indemnify him or her against the liability or expense under the Code or these Bylaws, with a person or entity that is regularly engaged in the business of providing insurance coverage.

Without limiting the power of Friends of EIHS to procure or maintain any kind of insurance or arrangement, Friends of EIHS may, for the benefit of persons indemnified by Friends of EIHS, (i) create a trust fund, (ii) establish any form of self insurance, including a contract to indemnify, (iii) secure its indemnification obligation by grant of any security interest or other lien on the assets of Friends of EIHS, or (iv) establish a letter of credit, guaranty or surety arrangement.

Any such insurance or other arrangement may be procured, maintained, or established within Friends of EIHS or with any insurer or other person deemed appropriate by the Board of Directors. In the absence of fraud, the judgment of the Board of Directors as to the terms and conditions of such insurance or other arrangement and the identity of the insurer or other person participating in an arrangement shall be conclusive, and the insurance or arrangement shall not be voidable and shall not subject the members of the Board of Directors approving the insurance or arrangement to liability, on any ground, regardless of whether the members of the Board of

Directors participating in approving such insurance or other arrangement shall be beneficiaries thereof.

ARTICLE VII: WAIVER OF NOTICE

Whenever any notice is required to be given under the Texas Business Organizations Code or under the provisions of the Certificate of Formation or the Bylaws of Friends of EIHS, a waiver thereof, in writing, signed by the person or persons entitled to such notice, whether before or after the time stated therein, shall be deemed equivalent to the giving of such notice.

Revision Tracker

Date	Revision	Vote
19 Jan 2026	<ul style="list-style-type: none"><i>Independent Governance</i>	Board Vote via GroupMe 5 Affirmative (quorum) - 18 Jan 2026

Friends of Energy Institute

Statements of Assurances

1. The board of directors is not and shall not be comprised of any members of the independent school district's board of trustees, the superintendent, or staff responsible for evaluating the partnership application or overseeing the performance contract.
2. The district assures that the majority of the governing body of each operating partner is not comprised of district staff.
3. No member of the board of directors is related within the first degree of affinity or consanguinity with any members of the independent school district's board of trustees, the superintendent, or staff responsible for granting the charter or contract to partner to operate or overseeing the performance contract.
4. The district assures that the district has not appointed a majority of the members of the governing board of each operating partner.
5. The board of directors will participate in board governance training provided by TEA, or a vendor recommended by TEA.
6. The board of directors will ensure that the district is notified of any changes to board membership.

The undersigned confirm their commitment to the assurances stated above.

Rhett M Davis

A handwritten signature in black ink that reads "Rhett M Davis". The signature is written in a cursive, flowing style.

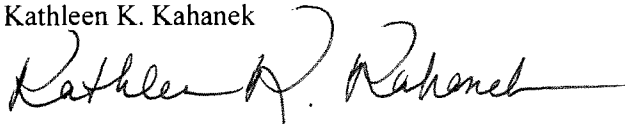
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Kathleen K. Kahanek

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[insert board member names and space for signature]

Brock Lewis

Brock Lewis

Friends of Energy Institute

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[insert board member names and space for signature]

Aline Pham

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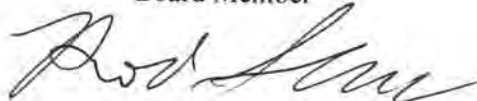
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Rod William Shampine
Board Member



1/20/2026

Friends of Energy Institute

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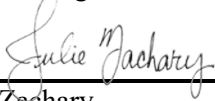
Lucie Shipp Tredennick

Friends of Energy Institute

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Julie Zachary

1/20/2026

Chair of the Board



ENERGY INSTITUTE

Board Info and Resumes

Full Name	Current Job Title and Employer	Position with Proposed School
Julie Zachary	Global Learning Leader GHD Engineering, Architecture & Construction Services	Governing Board Member Friends of Energy
Rhett Davis	Aeroderivative Gas Turbine Leader Wattbridge, ProEnergy Services	Governing Board Member Friends of Energy
Brock Lewis	Facilities Engineer & Project Manager Occidental Petroleum	Governing Board Member Friends of Energy
Rod Shampine	Critical Minerals Tech Advisor, Mechanical Architect, Direct Lithium Extraction Pilot Plant and Critical Minerals Group	Governing Board Member Friends of Energy
Lucie Tredennick	J.D., CCEP	Governing Board Member Friends of Energy
Kathy Kahanek	Partner Kahanek, Franke and Associates, L.C	Governing Board Member Friends of Energy
Aline Pham	Senior Accountant NRG Energy	Governing Board Member Friends of Energy

Julie Zachary

Education/Certification

M.Ed. Educational Technology Leadership, Lamar University, Beaumont, TX, 2018

BS - Animal Science, Texas A&M University, College Station, TX, 2013

Certificates – AoEC Team Coaching, EC-12 Principal Certification: Texas, 8-12 Science Education, 8-12 Life Science Education

Administrative and Leadership Experience

Global Learning Leader, Houston, TX 2023 - Present

- Led the strategic repositioning of enterprise learning at GHD, embedding a leader-learner-teacher philosophy and activating team coaching principles to drive high-performing, agile teams
- Designed and facilitated global leadership forums and summits, including the Enterprise Leaders Forum, Regional Leaders Forum and Learning Team Summit, using appreciative inquiry and experiential learning to foster strategic alignment and cultural transformation
- Developed and implemented multi-year business plans for the Learning Team, integrating universal design for learning, cohort-based experiences, and human-connected design to improve learner outcomes and organizational capability
- Coached regional leadership teams across Canada and other geographies, applying frameworks such as Team Coaching models, Tuckman Team Development and adaptive leadership to build trust, clarify roles, and strengthen collaboration
- Created a consistent and streamlined curriculum for learning programs that focus on development of role-specific onboarding and transition programs, with development programs focused on foundational, accelerating, and executive-level pathways, aligned to business priorities and talent strategy
- Spearheaded the creation of scalable learning resources such as the “Grab and Grow” toolkit and “Teams Coaching Toolkit,” enabling self-directed learning and peer-led development across the enterprise

Business School Technical Services Global Portfolio Manager, Houston, TX 2021 – 2023

- Developed a global approach to managing Technical Services learning and development activities.
- Connected talent management strategies to technical capability development through Service Line learning plans.
- Developed the Technical Services business plan to support organizational strategy.
- Managed a global team implementing on business plan and executing technical learning events.
- Coached leaders on influencing skills to enable broad organizational change initiatives.
- Led technical leadership pipeline development strategy and worked with team to create meaningful milestone learning opportunities for leaders.

Business School Technical Services Northern Hemisphere Portfolio Lead, Houston, TX 2019-2021

- Co-hosted and planned Technical Conferences.
- Designed and delivered GHD’s first design thinking centered program for co-creation with clients, the Client Challenge Program.
- Created and established GHD’s first virtual conference model, the Technical Summit.
- Piloted multiple whole organization technical innovation events.
- Piloted and project managed GHD’s first recognized learning accreditation with IACET and launched Continuing Education program.
- Led and facilitated numerous change management workshops across enterprise.

- Organized, planned and facilitated adult learning theory centered professional development for diverse group sizes and backgrounds on an array of topics.

Co-STEM Department Chair, Energy Institute High School, Houston, TX, 2018- 2019

- Developed mission and vision for STEM department with teacher and school leadership input.
- Planned and facilitated professional development centered department meetings to improve teacher pedagogy.
- Worked with teachers to develop projects that aligned with STEM department goals.
- Organized and led the department relocation to a new school building.
- Created inventory system for tracking all supplies and chemicals across three school buildings and four wet-labs.
- Developed safety trainings for all Career and Technology Education teachers and students.

Education-based Technology Trainer, Energy Institute High School, Houston, TX Fall 2016- 2018

- Regularly communicated new, relevant education-related technology to teachers.
- Hosted “EdTech Deep Dives” quarterly to assist teachers in authentic educational technology implementation.
- Created visual instructional plans for faculty and staff to quickly reference for completing various online tasks.
- Led best-practice technology training for faculty during weekly professional development.
- Assisted teachers with developing technology systems to increase work productivity.
- Connected teachers with technology solutions for a variety of classroom concerns.

In-Service Coordinator, Energy Institute High School, Houston, TX, 2016-2017

- Led goal setting and decision making committees to create a high quality in-service for beginning of school year staff professional development.
- Created a blended learning environment to effectively differentiate for various staff proficiencies using a variety of online platforms.
- Utilized the campus learning management system to deliver content to model quality digital content delivery.
- Re-branded the district required training to establish a meaningful connection from the district vision to the campus vision.
- Coordinated the selection of presenters and presentation guidelines for current faculty members.
- Facilitated growth-mindset workshops to assist in developing a positive, learning-centered campus culture.

AP Program Facilitator, Energy Institute High School, Houston, TX, Fall 2016 - 2017

- Organized monthly professional learning meetings to assist AP teachers in delivering their content in innovative ways.
- Verified AP course syllabi compliance with the Collegeboard AP Coordinator.
- Assisted with organizing AP testing procedures to insure classrooms and students are prepared for AP test in May.

Site-Based Decision Making Committee, Energy Institute High School, Houston, TX, 2014-2016

- Evaluated school for compliance with state policies and guidelines.
- Established protocol for Site-Based Decision Making Committee (SDMC) meetings to help facilitate communication and cohesiveness amongst members of team.
- Led the restructuring of the School Improvement Plan.

- Updated school website with current SDMC minutes.

Teaching Experience

High School Introduction to Engineering Design Teacher, Energy Institute High School, Houston, TX, 2017-2019

- Taught introductory survey of the engineering design process through various design projects.
- Utilized a variety of digital platforms for delivering and assessing student content.
- Integrated inquiry-based practices within a Project Based Learning (PBL) environment.
- Created a PBL curriculum that aligned with state standards and project standards as outlined by Buck Institute for Education.
- Worked collaboratively with various content areas to develop high-quality, cross-curricular project based learning experiences.

High School AP Chemistry Teacher, Energy Institute High School, Houston, TX, 2015- 2019

- Aligned curriculum with Collegeboard AP Chemistry standards and PBL.
- Facilitated AP Chemistry laboratory investigations to deepen student understanding of content.
- Collaborated with advanced mathematics teachers to reinforce mathematics concepts being previously taught.

High School Chemistry Teacher, Energy Institute High School, Houston, TX, 2014-2017

- Founded Energy Institute High School chemistry program.
- Created a PBL chemistry curriculum that aligned with state standards and project standards as outlined by Buck Institute for Education.
- Developed a learner centered, digital classroom through Itslearning, Gooru, Google Education, and other digital resources.
- Incorporated 21st Century Learning Skills with chemistry curriculum to prepare students for a changing professional landscape.
- Designed a safe laboratory that can facilitate high-quality chemistry experiments.

High School Integrated Physics and Chemistry Teacher, Energy Institute High School, Houston, TX, 2014-2015

- Incorporated Project Based Learning strategies with Integrated Physics and Chemistry curriculum.
- Worked with primarily below-grade level students who were behind in mathematics course work.
- Prepared students to enter rigorous upper-level science courses.

Middle School Science Teacher, Ortiz Middle School, Houston, TX 2013-2014

- Tracked and evaluated students using district projection data in order to prepare students to pass the State of Texas Assessments of Academic Readiness (STARR) exam.
- Differentiated learning for students based on district set projections.
- Developed strategies for teaching ESL and ELL students that improved student confidence when approaching difficult content.

Freelance Work

PBL Consultant, Galena Park ISD, 2018 & 2019

- Hosted professional development for Galena Park ISD science teachers and support staff.
- Created PBL materials that were relevant to the needs of the district.

- Provided sample projects and templates to assist teachers in planning their own PBL units.
- Served as a content expert for teachers as they developed their own classroom projects.

Gooru Fellow, Gooru, 2017

- Evaluated online chemistry content for in classroom effectiveness with high school students.
- Developed and implemented digital assessments for student mastery of Gooru modules.
- Incorporated digital Gooru chemistry content into Project-Based Learning curriculum.

Teacher Facilitator, Rice University, Houston, TX, 2015-2016

- Assisted with the Rice Excellence in Secondary Science Teaching in Chemistry professional development program for teachers within and outside of Houston Independent School District.
- Facilitated teaching educators in best practices related to inquiry-based science learning.
- Prepared laboratory investigations for teachers to demonstrate proper laboratory set-up in classrooms.
- Provided practical classroom applications for content and strategies as well as feedback from previously applied methods.

Additional Skills and Proficiencies

- Dynamic public speaker and facilitator (virtual and in-person)
- Diverse experience with online learning management systems
- Highly experienced in classroom integration of Google G-Suite such as (but not limited to): Drive, Docs, Slides, Forms, Sheets, Drawings, and Sites.
- Office365 and Microsoft Office Suite proficient
- General Makerspace Skill and Program Proficiencies, such as: AutoCAD, OnShape, Inkscape, 3D Printing, Laser Cutting
- Strategy development and implementation
- Design thinking and innovation development
- Curriculum development
- Mural and Microsoft Whiteboard
- Basic automation tasks in PowerAutomate
- Basic data visualization in PowerBI

Volunteer Experience

Houston Livestock Show and Rodeo, Agriculture Education Committee Committee, 2022- present

- Assisted the Houston Livestock Show and Rodeo through providing educational experiences to youth of Houston based on TEKS aligned agriculture curriculum
- Served as Captain of Curriculum Committee writing and updating curriculum for K-5 grades.

Houston Livestock Show and Rodeo, Naghavi Gatekeeper Committee, 2015-2022

- Assisted the Houston Livestock Show and Rodeo through scanning tickets at entry points to the rodeo.
- Provided customer service to rodeo patrons during the rodeo to ensure high-quality visitor experience.

References

References will be included if requested.

RHETT M DAVIS

COLLABORATIVE TEAM LEADER | INNOVATION • EXECUTION • RESULTS

Results driven leader focused on both top and bottom-line growth via innovation, customer engagement and operational excellence... delivered projects to increase asset output, availability and reduced costs to increase profitability

Collaborative leader with strong interpersonal, communication and facilitation skills, creating a culture of inclusiveness to connect and motivate across the organization to continuously improve and increase profitability

Strategic problem solver able to synthesize complex issues into data driven insights to support key decisions

Vision and Strategy Development

Customer Business Development

Strategic Supplier Partnerships

Contract Management

P&L Management

Curious, Engaged Listener

Budgeting & Forecasting

Culture and Change Management

Six Sigma / LEED Certified

PROFESSIONAL EXPERIENCE

WATTBRIDGE, PROENERGY SERVICES *\$1B Aeroderivative Gas Turbine Leader*

Asset Management, ERCOT Region | Houston, TX

Apr 2024 – Current

Vice President...Commercial and Plant Operations of 2.4 GW at six power plants; creating \$110MM EBITDA per year

- Created new O&M organizational structure to drive ownership; hired five team members to fulfill critical business roles and resolve process and accountability gaps
- Developed strategy to mitigate Stage 3-5 blade failure risk; minimizing operational risk and maximizing financial return; utilized HRCO partial buyback, bidding high risk units into Ancillary Services only; resulting in no turbine failures and protecting assets for successful \$1.3B asset sale
- Supported the sale of four power plants totaling 1.6 GWs to CPS Energy for \$1.4B; ProEnergy has responsibility for operating and maintaining the 4 plants, utilizing the organizational structure created to support the sale
- Promoted high-performing team members to create new challenges, accelerate learning and bring new perspectives to the role and the team
- Responsible for the monthly financial updates presented to the executive team and our owners, Energy Capital Partners. I coordinate across the accounting, O&M and field service teams to drive messaging, accuracy and quality control.

TALEN ENERGY *\$3B Independent Power Producer (IPP)*

Asset Management, ERCOT Region | Houston, TX

Aug 2023 – Apr 2024

Director...Responsible for 1.7 GW of natural gas assets at three power plants to deliver ~\$200M in Free Cash Flow annually

- **Saved \$2M in maintenance and lost opportunity costs** by identifying an alternate contractor to perform GSU repair at Nueces Bay, as the original contractor deemed the GSU unrepairable in September 2023
- Operated at **100% availability and 100% reliability during Winter Storm Heather** in Jan 2024
- Pivoted Barney Davis 1 from mothballing to continued operation, requiring a \$5M investment to return \$9M in Free Cash Flow, also provides 300MWs of **risk mitigation to hedge positions and Day Ahead commitments**
- Supported the sale of all ERCOT Region assets to CPS Energy, the sale closed April 2024

CALPINE CORPORATION *\$10B Independent Power Producer (IPP)*

Physical Security | Houston, TX

Nov 2022 – Aug 2023

Director...leading effort to implement new TSA regulatory guidelines across a fleet of natural gas pipeline assets

Asset Management, ERCOT Region | Houston, TX

Sep 2021 – Nov 2022

Director...leading customer relationship and supplier contract management to optimize asset financial performance

- Renewed **multiple long-term contracts in ERCOT**, including a 15-year water supply agreement with the City of Houston for our Baytown and Deer Park Energy Centers and an interconnection extension agreement with LCRA
- Led a team to resolve long-standing output derate at Deer Park facility, we identified a solution to meet environmental permit requirements while **increasing annual commodity margin** by \$200k per year

RHETT M DAVIS

- Strengthened Covestro customer relationship by leading transparent root cause analysis of two electrical disruptions, receiving feedback from Covestro team, **“your efforts have developed stronger trust and teamwork”**
- Collaborated across operations, regulatory, legal, commercial and IT to submit ERCOT Emergency Operating Plan

Power Plant Operations, Leadership Development Program | Houston, TX Aug 2017 – Sep 2021

Operations & Maintenance Manager...plant produces \$250M in revenue, while managing \$30M plant operating expenses

- Led a strategic turnaround of culture from manager-dependent **to self-directed, increasing team ownership and morale**, creating more cost-effective solutions, resulting in meeting our operating budget
- Created a culture of continuous improvement **through active listening of operator's persistent issues**, prioritizing solutions on safety and operational risks, resulting in zero safety events across 1,301 days

Investor Relations, Leadership Development Program | Houston, TX Jan 2016 – Aug 2017

Director... manage communicating corporate strategy and quarterly financial results

- Worked closely with Calpine's executive team to communicate strategic objectives in highly dynamic, quickly changing **competitive retail and wholesale power markets in Texas, California and the Northeast**
- Created investor content showing the growing reliance on intermittent, renewable resources and the reliability need for flexible, modern, dispatchable and efficient combined-cycle gas turbines

Outage Services Aero-derivative Gas Turbines | Houston, TX Apr 2014 – Jan 2016

Director... responsible for 24 critical power plant assets and \$20M annual Major Maintenance budget

- Implemented a fleet-wide strategy focused on increasing part utilization that **saved \$12M**
- Actively recruited to join Calpine's team while serving as Customer Service Manager at General Electric

GENERAL ELECTRIC COMPANY, ENERGY DIVISION *\$150B Multinational Conglomerate*

Senior Customer Service Manager, GE Aero Energy | Houston, TX Oct 2010 – Apr 2014

\$100M P&L U.S. West Leader... **grew topline from \$65M to \$110M in 2 years** while significantly improving our team's ability to listen to customers, served over 100 U.S. customers coordinating fulfillment of all services sales and operations

- **Grew market share by 250+% with my largest customer, Calpine Corp.** through active listening, tireless focus on their key initiatives and resolving long-standing equipment reliability issues

A.D. DAVIS CONSTRUCTION COMPANY *\$10M Residential and Commercial Building Construction*

Vice President, Sales, Customer Service and Project Management | St. Augustine, FL 2007 – 2010

P&L Leader... Responsible for sales, project management and green building initiatives

- Achieved highest combined sales (\$3M/year) and project management (\$6M/year) volume during 3+ years

GENERAL ELECTRIC COMPANY, ENERGY DIVISION *\$150B Multinational Conglomerate*

New Product Introduction Project Manager | Greenville, SC 2003 – 2007

Program Manager... Led the design of the world's most efficient simple-cycle gas turbine, LMS100

- Team Awarded the GE Energy **Growth Technology Award** in 2006, Ecomagination Clean Energy Project

Edison Engineering Development Program | Greenville, SC 2001 – 2003

GE's Premier Engineering Development Program

EDUCATION

MBA, Management of Technology, Tepper School of Business at Carnegie Mellon | Pittsburgh, PA | 2007

BS Mechanical Engineering, University of Florida | Gainesville, FL | 2001

BROCK LEWIS

Professional Experience

Occidental Petroleum, *Facilities Engineer & Project Manager*

July 2023 - Present

- Lead cross-functional projects as a Project Manager, ensuring timely delivery, budget adherence, and stakeholder alignment.
- Manage and maintain engineering facilities to ensure operational efficiency and compliance with safety standards.
- Coordinate with internal teams for facility upgrades, preventive maintenance, and resource planning.
- Implement cost-saving measures and optimize workflows to improve productivity.
- Ensure adherence to environmental, health, and safety regulations.
- Contributed to multiple infrastructure and optimization projects, driving efficiency and reliability.
- Supported major expansion efforts through equipment relocation and resource planning.
- Delivered automation and process improvement initiatives to reduce environmental impact.
- Leverage FAA Part 107 certification to conduct precision drone operations for aerial inspections and site surveys, enhancing project efficiency and data accuracy.

Certifications

- FAA Part 107 Drone Pilot License Certification (sUAS)

Education

Howard University, Washington, D.C.

Bachelor of Science in **Chemical Engineering**

Graduation Date: May 2023

Rod Shampine
SLB Technology Advisor, Critical Minerals

Professional

Critical Minerals Technology Advisor, 2021-present

Mechanical Architect, Direct Lithium Extraction Pilot Plant and Critical Minerals Group

REMS Engineering Advisor, 2014-2021

Technology and architecture work in the Coiled Tubing Group

Principal Engineer, 2011-2014

Lead ME for Disruptive Advances for Sustainable Unconventional Stimulation

EMS Systems Architect, 2010-2011

Design architecture for iControl, MLEF, and frac dart systems

Engineering Specialist, 2009-2010

Led the Reliability and Testing group for Surface Equipment and Trucks Division

Coiled Tubing Surface Equipment Group Leader, 2007-2008

Led the department to deliver a crash program to commercialize the X-11 Unit

Engineering Specialist, 2005-2007

Technical contributor across multiple departments

Project manager, 2004-2005

Led the Coiled Tubing Surface Equipment Group

Senior Development Engineer, 1999-2004

Project leader, X-11 Coiled Tubing Unit. This unit is now 46% of our offshore fleet

Co-led development and testing of the CT Offshore Express Unit

Development and testing of the CTExpress and CTPumper Units

Development Engineer, 1997-1999

Ruggedization of the Universal Tubing Length Monitor

Milestones

100th United States Patent granted, 2025

SLB Advisor, 2024

Advisors are recognized as the top approximately 2% of the technical personnel at SLB

SLB Principal Engineer, 2011

Principals are approximately the top 8% of the technical personnel at SLB

Texas Professional Engineer (PE), 2003.

Education

PhD Mechanical Engineering, Rice University, 1997

MS Mechanical Engineering, Rice University, 1993

BS Mechanical Engineering, Rice University, 1991

Volunteer Work

Lead Mentor, FIRST Robotics 2018-present

Teams 5892 Energy HEROs and 6243 Energy NERDs

Board Member, Friends of Energy Institute, 2022-present

Director at Large, ICoTA USA, 2018-2020

Committee Member, API 5ST, 2018-2020

Girl Scout Troop Leader, 2010-2020

LUCIE M. SHIPP TREDENNICK, J.D., CCEP®

TEXAS BAR NO. 24060745

Collaborative, solutions-focused higher education lawyer, Certified Compliance & Ethics Professional (CCEP)®, and former educator experienced in advising leaders using a litigator's eye for managing risk.

PROFESSIONAL EXPERIENCE

RICE UNIVERSITY

Assistant General Counsel

Regularly advise and train key stakeholders in response to a variety of legal concerns including student affairs, contracts, employment, litigation, and policy/governance.

Houston, Texas

June 2025-present

HOUSTON COMMUNITY COLLEGE SYSTEM (now Houston City College)

Assistant General Counsel

Additional Duties of the position of Associate Vice Chancellor, Compliance

Regularly advised a variety of stakeholders on matters impacting the College District. Representative work includes:

Houston, Texas

November 2017-May 2025

May 2023-May 2025

General Counsel/Legal Services

- Presented to the Chancellor, Chancellor's Executive Council, and Board of Trustees on legal issues, such as lawsuit resolution, student concerns, new and revised policy recommendations, and contracts;
- Led, empowered, and delegated effectively, including direct supervision of contracts and compliance teams;
- Collaborated with stakeholders to develop new and revise existing policies, procedures, and programs based on regulatory/legal developments, accreditation requirements, and institutional risk; and
- Advised internal and external stakeholders regarding emerging legal and compliance concerns, like the implementation of the Clery Act and DEI laws to ensure full institutional federal and state funding.

Contracts

- Together with team, reviewed for legal sufficiency and negotiated more than 600 contracts a year on topics ranging from software acquisition and implementation to facility rentals, to complex grants; and
- Created MOUs with Community Partners to meet college goals and advised departments on MOU compliance.

Litigation and Claims Management

- Conducted, or retained outside counsel for, internal investigations and recommended relevant corrective action in conjunction with institutional leadership;
- Collaborated to prepare and execute strategy for multi-court and agency litigation filed by *pro se* plaintiff; and
- Supervised outside counsel in responding to and resolving litigation, EEOC charges, and OCR complaints, including putative class actions.
- Served on in-house advisory team for *Hous. Cmty. Coll. Sys. v. Wilson*, before the Supreme Court of the United States, resulting in unanimous verdict on behalf of district (reported at 142 S.Ct. 1253).

Student Affairs and Employment Issues

- Advised the Student Conduct, Academic Integrity, and Ability Services offices to resolve complex matters;
- Advised the Office of Equal Opportunity and Title IX (OEO/TIX) on employment and student matters and improved standard operating procedure including process, forms, and training. Coordinated institutional response to agency proposed Title IX regulations and collaborated to implement final regulations;
- Led institutional response to create new Student Handbook, Code of Conduct, and Catalog, along with associated standard processes; created and implemented training at all levels to ensure consistency;
- Partnered with stakeholders to create policy for, train, and implement Behavioral Intervention Threat Assessment Team (BITAT), recommended by Risk Management and Internal Audit;
- Collaborated with internal counsel and specialty counsel to investigate and resolve police complaints; and
- Trained groups of staff remotely on the system for COVID FERPA compliance, in groups of up to 145 people.

Compliance

- Created and refined web-based app in conjunction with IT in order to facilitate and track regulatory compliance reporting obligations across the College; created and implemented training of 90 users; liaised with Internal Audit to ensure the app's effective use;
- Established Compliance Partners Council and Subject Matter Experts Work Group to structure compliance and ethics functions sustainably, effectively address key compliance areas, and champion accountability;
- Collaborated with Risk Management and Internal Audit to identify compliance risk areas to recommend/implement action following Enterprise Risk Management (ERM) review; and
- Oversaw third-party Ethics and Compliance Hotline to prevent illegal, unethical, and improper conduct and collaborate with executive management to ensure resolution of cases initiated through same.

Representative Institutional Service

- Co-Chair, *Clery Compliance Council*
- Co-Chair, *Artificial Intelligence Governance and Opportunities Council*
- Invited Panelist, *Artificial Intelligence, Ethics, and HCC*; Center for Teaching and Learning Innovation
- Planning Committee Member, recurring Subject Matter Experts Panelist, annual *Sense of Belonging Summit*
- Member, *SACSCOC Decennial Reaffirmation Working Group*
- Presenter, *Instructional Day, Instructional Leaders Day, and Adjunct Meeting*
- Ex-Officio Member, *Internet and Communication Technology and Accessibility (ICTA) Task Force*
- Ex-Officio Member, *Academic Integrity Work Group*
- Member, *Universal Design Task Force*
- Member, *Institutional Effectiveness Council*
- Member, *Strategic Assembly*

LUCIE SHIPP TREDENNICK, ESQ.

Houston, Texas

Attorney/Owner

November 2016-November 2017

Advised non-profit and private school leaders and other key stakeholders in response to legal and compliance issues including student affairs, contracts, employment, compliance, litigation, and policy/governance.

SCHULMAN, LOPEZ, HOFFER, & ADELSTEIN, L.L.P.

Houston, Texas

Senior Associate

February-November 2016

Advised education and non-profit leaders and faculty in response to legal and school community issues including student issues, employment, litigation, compliance, and policy/governance issues. Representative work includes:

- Prepared and accompanied more than 15 witnesses for interviews with the Department of Education's Office for Civil Rights (OCR) in investigation related to race discrimination;
- Created multiple governance options for non-profit client to open accredited private school; and
- Presented at 2016 Texas Children's Hospital Food Allergy Symposium – *Food Allergic Children in Schools – A Legal Perspective*.

THOMPSON & HORTON, L.L.P.

Houston, Texas

Associate

June 2011-February 2016

Advised education clients including colleges, universities, public school districts, municipal development corporations, private schools, and charter schools on various legal and business issues, including employment, compliance, governance/policy, open records, student affairs, and litigation matters. Representative work includes:

- Developed contracts for governmental bodies and non-profits to acquire and execute grants involving related entities with disparate interests, coordinating with executives and their attorneys;
- Investigated discrimination complaints, prepared persuasive position statements to, and negotiated successful resolutions with the Equal Employment Opportunity Commission (EEOC) and OCR and prepared periodic updates to elected board and community members regarding these complaints;
- Created training materials for, and trained faculty and school executives, regarding a variety of issues facing their campuses, including documentation for employee reviews and student accommodations;
- Prepared executives and administrators to hear and decide successfully employee and community grievances in compliance with local, board-adopted policies;

Lucie M. Shipp Tredennick

- Prepared witnesses for and presented testimony on behalf of school district in 8-day hearing related to a special education due process complaint, with the result of winning denial of all relief requested;
- Appeared before administrative bodies, including preparing strategy for and presenting witness testimony to agencies, such as an appeal to the Texas Department of Family and Protective Service's Child Protective Services, resulting in reversal of the agency's prior determinations;
- Drafted persuasive correspondence to the Attorney General's office regarding exemptions from open government laws, such as the Texas Public Information Act (TPIA); and
- Presented at 2014 TASA/TASB Convention - *Got Epi?: Considerations and Pitfalls with Epinephrine on Campus*.

GREER, HERZ & ADAMS, L.L.P.

Associate, Litigation Section

Galveston, Texas
September 2007-May 2011

Engaged in state and federal court litigation, appeals, arbitration, mediation, and settlement practice on behalf of private individual clients and as outside general counsel to a major insurance carrier. Representative work includes:

- Acted as the primary client liaison in an inverse condemnation case which resulted in a jury award of more than \$5,000,000.00;
- Prepared and presented mediation opening statement, which led to a significant settlement in employment dispute; and
- Supervised outside counsel in federal and state court litigation and agency matters.

ST. JOHN THE BAPTIST PARISH PUBLIC SCHOOLS

Special Education Teacher (mild/moderate and inclusion settings)

Reserve & LaPlace, Louisiana

August 2000- June 2004

Created, taught, and modified lessons and assessment tools in all subject areas, maintained IEPs for students with special needs. Awarded Reading Renaissance Model Educator Award (2003 and 2004); Awarded Louisiana Council for Exceptional Children mini-grant (2004); Served as school site Section 504 coordinator (2002-2003)

EDUCATION

TULANE UNIVERSITY LAW SCHOOL

Juris Doctor, cum laude

New Orleans, Louisiana

Common Law Curriculum

May 2007

- Honor Board Chief Justice; Tulane Juvenile Law Clinic; *Order of the Barristers*

CARLETON COLLEGE

Bachelor of Arts in Psychology, cum laude

Northfield, Minnesota

June 2000

Concentration: French and Francophone Studies; Study abroad in Pau, France and Mali, West Africa

PROFESSIONAL MEMBERSHIPS AND LICENSURE

Certified Compliance & Ethics Professional (CCEP)[®]

Licensed to practice before Texas courts, Texas Federal District Courts, and the Supreme Court of the United States of America

Member, Society of Corporate Compliance and Ethics (SCCE)

Member, National Association of College and University Attorneys (NACUA)

- Member, NACUA Committee on Virtual Programming

Member, Government Law Section, State Bar of Texas

Member, School Law Section, State Bar of Texas

- Member, Council of School Attorneys

COMMUNITY SERVICE

Energy Institute High School Parent Teacher Organization, Parliamentarian

St. Stephen's Episcopal School Houston, Trustee

Young Men's Service League – Piney Point, Chair, Member Meeting Committee

Scouting America, Registered Adult

Kathleen K. Kahanek

Background

Over 40 years practicing public accounting with an emphasis on taxation

Education

University of Houston, Main Campus

May, 1983, BBA Accounting

Experience

Kahanek, Franke and Associates, L.C. | 1309 S. Shepherd Dr., Houston, TX 77019

Partner – November, 1990 to current

Preparing and reviewing tax returns for over 1,000 clients from the Real Estate, Oil and Gas, Engineering, Automotive and various other industries.

Skills

- Certified Public Accountant, Texas

Interests

Volunteer and board member for many non-profits including the homeless, schools, neglected animals and food hardship. Founding member of Friends of Energy Institute and board treasurer for 4 years. Current board member for the Heights Interfaith Ministries Food Pantry and 150 hour per year volunteer at the pantry.

ALINE PHAM

SUMMARY

Strategic finance professional with experience spanning corporate operations, energy innovation, and venture collaboration. Adept at translating financial and market insights into actionable strategies that drive growth and operational efficiency. Combines analytical rigor with entrepreneurial vision, supported by hands-on exposure to startups, and emerging technologies through TEX-E, WEC Renewables, and personal venture initiatives. Passionate about bridging corporate strategy with innovation ecosystems to deliver measurable business impact.

EXPERIENCE

NRG Energy, Houston, TX – Senior Accountant, Power Customer Operations – Direct Energy C&I, Xoom, & Energy Plus (Nov 2019 – Present)

- Support NRG's Gross Margin operations by analyzing financial performance, identifying efficiency opportunities, and partnering cross-functionally to resolve revenue gaps and strengthen reporting accuracy.
- Identified and recovered \$6.5MM in missed revenue while streamlining internal collection processes.
- Present monthly financials and business insights to leadership, supporting data-driven decision-making across multiple business units.
- Launched an internal newsletter and engagement platform to improve communication and collaboration across accounting and tax teams—demonstrating initiative in organizational development and internal stakeholder engagement.

Centrica – Direct Energy, Houston, TX – Business Development Manager (Interim), NA Home (Jun 2019 – Sep 2019)

- Initiated and led the pilot for a Real Estate Sales Channel, projecting \$4.8MM+ in annual revenue and 24,000 new Texas customers.
- Partnered with cross-functional teams (legal, marketing, finance, and operations) to design go-to-market strategy, ensuring regulatory compliance and long-term scalability.

Senior Financial Planning & Analysis Analyst, FP&A (Jan 2018 – Sep 2019)

- Managed \$126MM annual expense budgets across multiple business lines, providing actionable insights to optimize profitability and operational performance.
- Created financial models linking revenue projections to headcount and operational expenses, improving forecast accuracy.

- Recognized with Centrica-wide awards for Diversity & Inclusion and People Development initiatives.

Finance Business Partner, NA Home Energy (Apr 2017 – Dec 2017)

- Delivered financial reports and KPI insights to the Chief Sales and Marketing Officer, driving strategic planning and investment decisions.
- Co-led preparation of \$600MM annual budgets, aligning financial plans with commercial strategy.

INNOVATION & VENTURE PROJECTS

Texas Entrepreneurship Exchange for Energy (TEX-E) – Graduate Fellow, Greentown Labs & MIT Martin Trust Center (2022 – 2024)

- Conducted independent research on an academic–corporate collaboration models for innovation.
- Coordinated TEX-E initiatives linking universities, startups, and corporates across the Texas energy ecosystem.
- Supported MIT Energy Conference, TEX-E conference, and Insights Group operations, including finance, sponsorships, and student engagement.

WEC Renewables – Business Development Consultant (2022)

- Proposed an offshore wind turbine market expansion strategy, identifying a new \$16MM annual revenue opportunity.
- Delivered market intelligence, competitor research, and go-to-market analysis to the CEO and business development leadership.

Food Truckie – Co-founder & Consultant (2016)

- Developed a startup concept connecting mobile food vendors with consumers; created the business model, revenue projections, and investor pitch that secured seed funding.
- Built partnerships with local operators to validate operations and customer experience.

VOLUNTEER LEADERSHIP

- Friends of Energy – Board of Directors (Aug 2023 – Present)
- Houston Energy & Climate Week – Academic Engagement Committee (May 2024 – Present)

EDUCATION

Master of Business Administration (MBA) – University of Houston, C.T. Bauer College of Business

Focus: Strategy, Energy Transition, and Innovation



ENERGY INSTITUTE

Team Bios and Resumes

Friends of Energy Governing Board

Rhett M. Davis, MBA, BSME — Power Generation, Operations, and P&L Leadership

Rhett's senior leadership roles at WattBridge/ProEnergy, Talen Energy, Calpine, and GE span asset management, operations, commercial strategy, budgeting, and regulatory coordination across multi-gigawatt portfolios. He has led culture turnarounds, cost-saving initiatives, and reliability improvements under high-stakes conditions. Rhett strengthens the board's ability to assess facilities planning, safety, operational risk, and industry partnerships linked to Energy's engineering pathways and maker-space operations.

Kathleen K. Kahanek, CPA — Finance, Audit, and Nonprofit Stewardship

With 40+ years in public accounting and a long tenure as a partner in a Houston firm, Kathleen provides deep expertise in tax, compliance, and financial controls across industries including oil and gas and engineering. A founding member and former treasurer of Friends of Energy Institute with extensive nonprofit board service, she anchors the board's fiscal integrity, audit readiness, and sustainability planning.

Brock D. Lewis, B.S. Chemical Engineering (Energy Alum) STEM Pipeline & Alumni Voice

An Energy Institute graduate and chemical-engineering professional with internships in global energy analytics and consulting, Brock contributes current, early-career industry insight, data-analysis skills, and a vital alumni perspective on student experience, rigor, and support. His presence helps the board remain attuned to student pathways, work-based learning, and equity in access to advanced STEM opportunities.

Aline Pham, MBA — Strategy, FP&A, and Energy-Sector Finance

A strategic finance professional in the energy industry, Aline brings hands-on experience in FP&A, budgeting, margin analysis, and business development for complex energy operations. Her innovation work connecting startups, universities, and corporations strengthens the school's external partnership strategy and keeps programming aligned to an evolving energy transition. Aline's perspective supports data-driven budgeting, resource allocation, and growth planning.

Rod Shampine, Ph.D., P.E. — Technology Innovation & Critical Minerals

A technology advisor recognized among the top 2% of technical professionals at SLB, Rod holds 100 U.S. patents and has led architecture and commercialization of complex engineering systems, including direct-lithium extraction pilots. As a Professional Engineer and long-time FIRST Robotics mentor for Energy's teams, he brings unmatched insight into engineering design, reliability, safety, and innovation ecosystems—directly enhancing the rigor and authenticity of student projects and capstones.

Lucie M. Shipp Tredennick, J.D., CCEP® — Governance & Compliance

A licensed attorney, Lucie currently practices as a member of the legal team of a private non-profit higher education institution. Prior to this role, she served a large urban community college system, where

she worked as a lawyer and led the Compliance department. Before these in-house roles, Ms. Tredennick worked for law firms focused on school law and litigation. Her practice areas include student affairs, employment, contracts, policy, and regulatory compliance. She has advised executive leaders and boards, overseen complex investigations, and supported landmark litigation. Lucie's presence ensures strong policy oversight, student-rights protections, and regulatory compliance across the school's operations.

Julie Zachary (Lockhart), M.Ed., Principal Certification — Education & Adult Learning Leadership

A former Energy Institute AP Chemistry teacher and STEM department leader, Julie brings direct expertise in PBL design, curriculum alignment, teacher coaching, and professional learning systems. Her subsequent global leadership roles include designing enterprise learning strategies, leading large-scale technical summits, and facilitating organizational change. Julie's background ensures the board maintains a sharp focus on instructional quality, professional development, and effective implementation of interdisciplinary projects—all central to Energy's model.

Energy Institute Instructional Leadership Team

Nicholas Champion, M.Ed. — Dean of Students

Nicholas Champion is a dynamic school leader with experience spanning student culture, instructional coaching, fine arts leadership, and project-based learning. As Dean of Students at Energy Institute High School, he oversees a cohort of 240 students, manages discipline and restorative practices, supports academic interventions under HB 1416, and coaches both new and experienced teachers. He also co-sponsors senior activities and manages the campus At-Risk program, ensuring comprehensive support for diverse learners.

Nicholas previously served as an Administrative Intern and multi-content teacher at Advanced Learning Academy in San Antonio ISD, where he taught theatre arts, technical theatre, journalism, and AP World History while leading the Fine Arts Department. He coordinated large-scale student performances, supervised student organizations, and facilitated professional learning communities focused on adult learning and reflective practice.

Stephanie Collins, M.Ed. — Campus Testing Coordinator

Stephanie Collins is a seasoned administrator with more than two decades of leadership experience in Houston ISD, specializing in behavior intervention, equitable discipline systems, crisis response, testing coordination, and instructional coaching. As Campus Testing Coordinator, Campus Technology Coordinator, and Instructional Leader at Energy Institute High School, she oversees all standardized testing operations, coordinates campus technology deployment, and supports teachers through targeted feedback aligned to T-TESS and PBL implementation.

Prior to joining Energy, Stephanie served as an Assistant Principal and Dean of Students at Holland Middle School, where she led schoolwide behavior systems, discipline investigations, parent conflict resolution, attendance initiatives, and crisis intervention frameworks. She served as a T-TESS appraiser, coordinated the IAT process, led the campus behavior team, and managed summer school operations. Her earlier administrative experience includes serving as Teacher Specialist, Title I Coordinator, and Testing Coordinator, where she managed compliance documentation, facilitated parent education programs, coordinated community partnerships, and delivered districtwide professional development.

Lauren Garcia, M.Ed. — Assistant Principal / Dean of Students; Master Scheduler & CCMR/LPAC Lead

Lauren Garcia is a veteran campus administrator whose experience spans student services, master scheduling, CCMR strategy, LPAC coordination, CTE and dual credit program management, and school safety operations. As Assistant Principal/Dean of Students at Energy Institute High School, she oversees a cohort of ~230 students, leads scheduling and growth-plan processes, coordinates college access supports, and manages implementation of Personal Graduation Plans (PGPs) across the campus. She tracks CCMR indicators for juniors and seniors, supports TSIA and Texas College Bridge implementation, and partners with the testing coordinator to ensure students meet pathway requirements on time.

A certified T-TESS and HISD Teacher Excellence System (TES) appraiser, Lauren provides weekly instructional feedback and coaching—particularly around PBL implementation—while also serving as the school's Master Scheduler, building, updating, and maintaining the SIS master schedule each year. She chairs LPAC, ensures TELPAS readiness for Emergent Bilingual students, and coordinates instructional supports in alignment with state guidance. As Safety Captain, she leads campus drills, compliance documentation, and monthly safety committee meetings. Her operational portfolio also includes CTE Liaison (IBC testing, Perkins orders, practicum recruitment and readiness), Dual Credit Coordinator, Graduation Lab Coach, Technology Liaison, and Building Maintenance Liaison.

Elizabeth Harris, M.Ed. — Dean of Instruction

Elizabeth Harris is an experienced instructional leader with more than a decade of expertise in project-based learning (PBL), teacher coaching, and interdisciplinary curriculum design. As Dean of Instruction at Energy Institute High School, she leads professional development, campuswide instructional coaching, and the appraisal system for all teachers. She also oversees the school's annual action plan aligned to TEA accountability metrics and serves as the campus Advanced Placement Coordinator, ensuring rigor, access, and student success in advanced coursework. [1882 EHarris Resume | PDF]

Prior to her current role, Elizabeth served as a Multi-Classroom Leader at Westchester Academy, where she launched a PBL program across grades 6–12, guided the campus through remote and hybrid learning transitions, and supported exhibition-based student showcases. She previously taught at Energy Institute, where she chaired the English department, mentored new teachers, and helped design interdisciplinary junior-year PBL units integrating English, U.S. History, Environmental Engineering, and Environmental Science.

Lori Lambropoulos, M.S. — Principal

Lori Lambropoulos is the founding principal of Energy Institute High School and an award-winning educational leader with more than 30 years of experience across teaching, school leadership, program design, and innovative school development. Since opening Energy Institute in 2013, she has built and sustained a nationally recognized STEM magnet program grounded in interdisciplinary project-based learning. Under her leadership, Energy has earned an A rating in all domains of TEA accountability (2022–2026), received the Magnet Schools of America Donald R. Waldrip Award, and secured more than \$1.5 million in industry partnerships and philanthropic support to advance equitable STEM pathways.

Lori's accomplishments include increasing female participation in STEM from 18% to 40%, designing a state-of-the-art \$37 million facility intentionally structured for collaborative PBL, and creating an industry advisory board of more than 25 partners. She successfully managed a four-year, \$1.5 million Magnet Schools Assistance Program (MSAP) grant, led implementation of "Art of Coaching Teams" for instructional leadership development, and established systems that sustain student recruitment and achievement.

Noelle MacGregor, M.Ed. — Assistant Principal / Dean of Students; Founding Leadership Team Member

Noelle MacGregor is a founding member of Energy Institute High School and a veteran school leader with more than twenty years of experience in student support, school culture, project-based learning, and program development. She played an integral role in co-creating and opening the nation's first energy-focused magnet high school, helping shape the school's mission and vision, design the instructional model, and develop partnerships with corporations and nonprofit organizations that continue to sustain innovative learning experiences for students.

As Assistant Principal/Dean of Students, Noelle oversees academic planning, discipline systems, college and career guidance, master scheduling, and cohort assignment for more than 220 students. She regularly participates in ARD, 504, and IAT meetings, ensuring coordinated academic and behavioral supports for diverse learners, and she serves as a T-TESS appraiser responsible for coaching teachers toward high-quality, student-centered instruction. Noelle co-creates the master schedule, designs alternate bell schedules for testing and exhibitions, and contributes to campus hiring and recruitment through interview committee participation and job fair engagement.

Elizabeth TwoSisters, M.Ed. — Special Populations Instructional Lead

Eli TwoSisters is a nationally certified Listening and Spoken Language Specialist (LSLS Cert. AVEd) and a highly experienced educator of students who are Deaf or Hard of Hearing. With more than a decade of expertise supporting diverse learners, she brings deep knowledge of auditory-verbal intervention, special education compliance, and inclusive instructional design to Energy Institute High School's ILT.

Eli's career includes service as a Teacher of the Deaf at Clarke Schools for Hearing and Speech and in Houston ISD, as well as work as an auditory enrichment teacher and LSL Coordinator supporting language development through evidence-based practices. She is the founder and lead educator of Bridges Auditory Verbal Practice, where she provides mentoring, consultation, and direct services to families and educators.

Proposed Leadership Structure for the 2026-2027 School Year

Full Name	Current Job Title and Employer	Position with Proposed School
Lori Lambropoulos	Principal of Energy Institute Houston ISD	Executive Director of Friends of Energy Operating Partner
Elizabeth Harris	Dean of Instruction at Energy Institute Houston ISD	Principal at Energy Institute
Noelle MacGregor	Dean at Energy Institute Houston ISD	Dean at Energy Institute
Lauren Garcia	Dean at Energy Institute Houston ISD	Dean at Energy Institute
Nicholas Champion	Dean at Energy Institute Houston ISD	Dean at Energy Institute
Eli TwoSisters	Special Education Chair Houston ISD	Special Education Chair at Energy Institute
Stephanie Collins	Testing Coordinator at Energy Institute Houston ISD	Testing Coordinator at Energy Institute
Julie Zachary	Global Learning Leader GHD Engineering, Architecture & Construction Services	Governing Board Member Friends of Energy
Rhett Davis	Aeroderivative Gas Turbine Leader Wattbridge, ProEnergy Services	Governing Board Member Friends of Energy
Brock Lewis	Facilities Engineer & Project Manager Occidental Petroleum	Governing Board Member Friends of Energy
Rod Shampine	Critical Minerals Tech Advisor, Mechanical Architect, Direct Lithium Extraction Pilot Plant and Critical Minerals Group	Governing Board Member Friends of Energy
Lucie Tredennick	Assistant General Counsel Rice University	Governing Board Member Friends of Energy
Kathy Kahanek	Partner Kahanek, Franke and Associates, L.C	Governing Board Member Friends of Energy
Aline Pham	Senior Accountant NRG Energy	Governing Board Member Friends of Energy



ENERGY INSTITUTE

Teacher Recruitment and Hiring

Energy Institute High School implements a rigorous, mission-aligned recruitment and hiring strategy designed to attract educators who thrive in a high-quality, project-based learning environment and are committed to STEM, engineering pathways, and authentic student exhibitions. The goal is to ensure that all campus roles are fully staffed by July 1 each year.

Selection Criteria

Energy's instructional model merges core academic content with engineering design challenges, interdisciplinary collaboration, and hands-on project development. As such, the school seeks candidates who demonstrate:

Mission Alignment

- Commitment to interdisciplinary Project-Based Learning (PBL) as the primary mode of instruction.
- Belief in Energy's mission to "change the world one project at a time."
- Enthusiasm for working in flexible learning spaces, including breakout rooms, collaborative hallways, and our makerspace.
- Openness to community partnership, corporate engagement, and student exhibitions.

Instructional Expertise

- Ability to design and implement high-quality PBL curriculum, including lessons with embedded engineering or real-world components.
- Skill in analyzing student data (STAAR, NWEA MAP, project rubrics) to differentiate instruction.
- Comfort with integrating technology into the engineering classroom, including fabrication tools used to create student prototypes (e.g., 3D printers, laser cutters), if applicable.
- Experience with interdisciplinary planning teams.

Professional Competencies

- Strong communication, collaboration, and adaptability in a fast-paced environment.
- Willingness to coach students in soft skills, workforce preparation, and engineering design cycles.
- Engagement in a reflective practice and responsiveness to feedback.

Qualifications

- Appropriate Texas certification for the role.
- Competitive candidates may possess engineering, computer science, robotics, and/or STEM-industry experience.
- Commitment to participating in four annual campus exhibitions that showcase student learning.

Recruitment Timeline

Energy uses a multi-stage annual recruitment cycle aligned to district timelines and tailored to attract high-quality STEM/PBL educators.

January–February: Internal Staffing Review

- A staff intent-to-return survey is distributed to all faculty and staff.
- Administrators conduct individual follow-up conversations with team members unsure of returning.
- Confirmed vacancies are identified by late February.
- Open positions are posted early on the HISD website and targeted STEM recruitment platforms.

March–July: Job Fairs & Initial Screening

- Energy administrators and teacher leaders may attend job fairs hosted by HISD, local universities, and/or regional STEM teacher programs.
- Screening interviews take place at each fair attended, led by campus administrators.
- Talent pools are built early to fill both immediate and anticipated vacancies.

Hiring Process

Energy has a multi-step hiring protocol that ensures each candidate is thoroughly vetted and has demonstrated the capacity to thrive in a PBL STEM environment.

1. Application Screening

- Review of resumes, certifications, content knowledge, and indicators of mission alignment.
 - Candidates with PBL, engineering, computer science, and/or STEM-related experience receive priority consideration.

2. Initial Screening Interview

- Conducted at job fairs, over the phone, or virtually.
- Assesses candidates' fit with Energy's interdisciplinary culture, comfort with engineering-based challenges, and openness to PBL.

3. Formal Interview Panel

- Candidates participate in a structured interview with a panel that includes:
 - Campus administrators
 - Department leads or content teachers
- Interview questions focus on instructional philosophy, PBL implementation, and collaboration.

4. Required Sample PBL Lesson

All teacher candidates must teach a sample PBL lesson as part of the interview process.

The lesson must:

- Include an authentic engineering or real-world challenge
- Demonstrate inquiry-based instruction, student voice, and collaborative structures
- Reflect Energy's interdisciplinary expectations
- Show alignment to TEKS and the school's engineering and design approach

A panel evaluates the lesson using a common rubric.

5. Campus Tour

Candidates tour Energy's flexible learning spaces, breakout rooms, and makerspace to understand the campus environment and expectations.

6. Reference & Credential Verification

Administrators verify certification, employment history, and professional references.

7. Hiring Decision & Offer

The Principal/Executive Director makes final selections based on panel recommendations and candidate demonstration of PBL readiness.

8. Onboarding and Induction (June–July)

- All teachers participate in PBL training and engineering pathway orientation (if applicable).
- Collaborative teams work on interdisciplinary project planning for the fall.
- Teachers receive coaching in STEM industry engagement and exhibition preparation.

Ensuring Staffing by July 1

Energy ensures the campus is fully staffed on time through:

- Early vacancy identification (February)
- Monthly job fair attendance (March–July)
- Accelerated scheduling of interviews and sample lessons
- Immediate offers to high-quality candidates
- Backup recruitment for hard-to-staff roles through industry outreach, university relationships, and engineering partners

The banner features a photograph of a modern school building with large glass windows and a red brick section on the left. A green diagonal graphic element is on the right. The text 'ENERGY INSTITUTE' is in large white capital letters, and 'Professional Development Plan' is in smaller white text below it.

ENERGY INSTITUTE

Professional Development Plan

Energy Institute High School implements a comprehensive induction and professional learning system designed to prepare teachers for the unique rigor of interdisciplinary project-based learning (PBL), engineering-focused instruction, and performance-based assessment. Our system ensures teachers develop the skills needed to both meet the mission of the school and continuously grow in personal instructional effectiveness.

Teacher Induction Program

Energy provides a robust onboarding experience that equips new teachers and administrators with the knowledge and skills needed to deliver the school's interdisciplinary engineering and PBL model.

3-Day PBL 101 Onboarding

All newly hired teachers and campus administrators participate in a three-day PBL 101 Institute, which includes:

- Foundations of high-quality PBL
- Backward design for interdisciplinary engineering projects
- Strategies for integrating TEKS, engineering design process (EDP), and authentic assessments into teacher-created curriculum
- Project tuning protocols
- Scaffolding for academic language and literacy within PBL
- Classroom culture and routines (collaboration norms, critique/feedback, exhibition readiness)
- Coaching for Global Graduate Skill development

This PBL onboarding ensures all faculty understand Energy's signature structure: interdisciplinary teams (English, science, social studies, engineering) collaboratively designing large-scale, real-world challenges that culminate in public community exhibitions.

Teacher Evaluation Tools and Processes

Energy uses a multifaceted evaluation system aligned to T-TESS and tailored to the interdisciplinary PBL model.

Cohort-Based Appraisal System

Each teacher is appraised by the Instructional Leadership Team (ILT) member assigned to their cohort. This structure ensures:

- Every interdisciplinary team receives support from an instructional leader deeply invested in their team's specific project ideation, design, and implementation.

- Feedback is aligned across content areas.
- Growth goals for teams and individual teachers are anchored in the quality of their project design and instructional delivery.

Monthly ILT Walkthrough Cycles

The ILT conducts monthly classroom walkthroughs for every teacher, focusing on:

- Alignment to the T-TESS rubric
- [High Quality PBL](#) instructional practices (student collaboration, inquiry, and real-world application)
- Formative assessment and teacher feedback quality
- Support for special populations
- Classroom culture

Each walkthrough results in actionable feedback delivered through coaching debriefs and/or written notes.

T-TESS Formal Evaluations

In addition to walkthroughs:

- Teachers receive formal T-TESS observations and a summative conference.
- Evaluation trends are tracked over time to identify campus-wide professional development needs.

Targeted and Personalized Support for Staff

Energy's support model includes multiple layers of personalized coaching and capacity-building for teachers.

Professional Development Lead

One campus administrator serves as the Professional Development Lead, responsible for:

- Designing and delivering weekly professional development (PD)
- Training new and returning teachers in PBL methods
- Leading calibration walks to align expectations across classrooms
- Analyzing walkthrough data to identify instructional trends
- Coaching teachers individually and/or by cohort

The current PD Lead has 10+ years of classroom teaching experience, holds an M.Ed. in Curriculum & Instruction, and has trained hundreds of educators in PBL design, facilitation, and assessment. This expertise ensures high-quality adult learning and alignment to Energy's instructional vision.

Resource Allocation for Professional Development

Energy consistently allocates resources to support professional learning, including:

- Stipends and/or extended contracts for PBL planning
- Dedicated planning days for interdisciplinary project design
- Funding for external PBL and engineering-related training (e.g., PLTW courses)
- Maker space materials for PBL prototyping
- Time dedicated weekly to campuswide professional development

Professional Development Calendar & Methods

Energy uses a combination of workshops, coaching cycles, team planning, data meetings, and calibration walks to build instructional capacity. PD is offered weekly and is aligned to data trends and project implementation needs.

Professional Development Methods

- Weekly PD sessions (whole staff)
- Cohort-based planning with ILT support
- Project tuning protocols
- Calibration walks (ILT-led)
- Instructional coaching cycles
- Data digs after each assessment window
- Special populations workshops (SPED, EL, 504)
- Engineering pathway alignment sessions

Draft Professional Development Calendar

Month	Focus Area
July (Onboarding)	PBL 101 Institute; Project Tuning; Engineering Pathway Orientation; Maker Space Training
August	High-Quality PBL Characteristics; Classroom Culture & Collaboration Norms; Differentiation for Special Populations (SPED, EL)
September	Differentiation for Special Populations (SPED, EL); Formative Assessment in PBL; State Accountability Updates
October	Data Dig #1; Using MAP to Inform Project Revision
November	Project Management & Student Agency; Rubric Calibration
December	Project Tuning Round 3; Literacy Strategies in PBL
January	Data Dig #2; Re-teaching Plans; Intervention Planning within PBL; IBC Preparations
February	High-Quality PBL: Authenticity & Real-World Relevance; Community Partnership Integration; MOY Data Dig
March	Project Tuning Round 2; Exhibition Planning
April	Special Populations Deep Dive: Inclusive Group Work & Scaffolded Inquiry

May	End-of-Year Reflection; Project Archive Development; Teacher Goal Setting for Next Year
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Through a rigorous induction program, cohort-based appraisal system, consistent walkthroughs, targeted coaching, and strategically designed professional development, Energy Institute High School ensures that every teacher is fully prepared to deliver a high-quality, interdisciplinary PBL engineering experience for all students.



ENERGY INSTITUTE

Operating Budget and Narrative

An operating budget is a financial plan that outlines the anticipated revenues and expenditures necessary for the district to carry out its educational programs and administrative functions over the fiscal year. The budget includes projections for income sources such as state and federal funding, local property tax revenues, and any other grants or contributions that the district expects to receive. These revenue assumptions are typically based on enrollment forecasts, legislative appropriations, historical trends, and guidance from the Texas Education Agency (TEA).

On the cost side, the operating budget accounts for expenditures related to personnel salaries and benefits, instructional materials, facility maintenance, transportation, utilities, and other operational needs. Cost estimates are developed by reviewing prior year expenses, evaluating contractual obligations, and considering any anticipated changes in staffing, program offerings, or regulatory requirements. The budget narrative explains that the district aims to allocate resources efficiently, prioritizing instructional support and essential services while maintaining compliance with GAAP and state guidelines. Assumptions about cost increases, such as salary adjustments, benefits, and inflation, are carefully documented to provide transparency and justify proposed appropriations. This comprehensive approach ensures that both revenue and expenditure projections are realistic, grounded in current data, and aligned with the district's strategic objectives.

Identifying a fair and sustainable funding model is an essential step in establishing the school's new status. Such a model will work to maximize school-level flexibility while also sufficiently aligning with district financial realities.

If this application is approved, we look forward to working with the Houston Independent School District (HISD) to create a detailed, specific budget as part of the signed performance contract between the nonprofit partner and HISD.

Here is the process we intend to take to identify the annual funding available to Energy Institute:

1. Calculate all revenue associated with the school and its students.
 - a. This revenue will change annually based on the school's enrollment, attendance, and several other factors, as well as upon the amounts designated for the school by the state of Texas and other funding sources
 - b. The calculation for revenue should include the following sources:
 - i. Base state and local allocation – Including weighted allocations (for students with disabilities, for example)
 - ii. State additional funding for the school as an approved SB 1882 campus
 - iii. CCMR outcome bonuses generated by students at the school

- iv. All other CTE or other funding generated by students at the school
- v. Teacher Incentive Allotment funding generated by teachers at the school
- vi. Teacher Retention Allotment generated by teachers at the school
- vii. Federal funding for students enrolled at the school, including:
 - 1. Title I
 - 2. IDEA
 - 3. Perkins
- viii. The appropriate share of any future local, state, or federal programs that are directed to support the school, school staff, and/or students in the school

2. Identify the cost of HISD services

- a. Energy Institute High School will remain a proud HISD school, reliant on the district for many important services. During the negotiation of the performance contract, we look forward to working with HISD to identify district services as optional or non-optional. The cost of transportation, facilities maintenance, or even a cost that may not directly benefit our school such as out-of-district special education services, for example, are significant elements in the district's budget. It would be unfair for SB 1882 schools not to have to contribute a fair share to the cost of these services. On the other hand, the school may choose to take advantage or not take advantage of district services in areas such as academics and family and community engagement. Under the financial framework, we intend annually to work with HISD to identify which district services the school will opt into (and pay for at an appropriate rate) and which the school will provide itself. The school will not have access to the district services it opts out of.
- b. Non-optional services: We suggest a per-student fee assessed by HISD to cover the cost of these mandatory district services, with the amount of the fee based on actual cost to the District, to the extent this cost can be determined, and capped at a reasonable percentage of total revenue. These services will likely include such costs as:
 - i. Central district leadership (superintendent, CFO, etc.)
 - ii. Facilities maintenance
 - iii. Utilities
 - iv. Out-of-district special education costs
 - v. Human resources processing and employee payroll
 - vi. Finance department and purchasing
 - vii. Grants management
 - viii. Enrollment services
 - ix. Transportation
- c. Optional services: We look forward to a list of the reasonable cost of other district services that the school may annually choose to access

3. The allocation to the school is then the school revenue (adjusted for enrollment and attendance) minus the amount paid for HISD services, leaving net revenue for the school. This revenue will be used to cover cost including:

- a. Staff
 - i. Paying for an Executive Director and school-based staff
 - ii. Costs of salary plus benefits

- b. Contracted Services
 - i. Technical assistance
 - ii. Community partners
- c. Supplies and Materials
- d. Technology
- e. Other

4. For the purposes of this application, we are using the [following estimates](#) for the school's net revenue. In addition to the 6,237,274 outlined in the attached estimate which includes \$1,600 in 1882 funding. The proposed budget does not include campus-generated TIA and TRA funding; however EIHS would plan to allocate those funds as follows:
- a. TIA funding: \$TBD, 90% passed to campus educators, 10% for EIHS administration
 - b. TRA funding: \$TBD, 100% passed to campus educators

Budget Category	Description	Allocation
11	Instruction	3,900,000
12	Instructional Resources and Media Services	85,855
13	Curriculum Development and Instructional Staff Development	50,000
21	Instructional Leadership	955,000
23	School Leadership	170,000
31	Guidance, Counseling, and Evaluation Services	50,000
32	Social Work Services	
33	Health Services	76,419
34	Student (pupil) Transportation	50,000
35	Food Services	
36	Co-curricular/extracurricular Activities	40,000
41	General Administration	350,000
51	Facilities Maintenance and Operations	

52	Security and Monitoring Services	
53	Data Processing Service	
61	Community Services	10,000
91	Contracted Instructional Services Between Public Schools	
95	Juvenile Justice Alternative Education Program	
97	Payments to Tax Increment Fund	
81	Capital Outlay	500,000
		Total: 6,237,274

Instructions for using the TEA Model Local Campus Partner Application Scoring Rubric

Districts may use this model scoring rubric or create their own. Districts that create their own rubric to vet potential operating partners must have the locally created rubric approved as part of the benefits application process.

- If this rubric is altered, the locally developed rubric **MUST** be submitted to TEA by the following due dates (emailed to TXP@tea.texas.gov) as part of the benefits approval process:
 - Friday, December 5, 2025, at 5 p.m. (Central Time), OR
 - No later than 5 days prior to the release of the district's local campus application (whichever date is sooner).

Last updated May 1, 2023.

TEA will not amend model documents (other than for formatting or typos) between the time that the To the Administrator Addressed letter is released and the current year due date.

Revision history:

Date of Update	Revision Summary
May 1, 2023	<ul style="list-style-type: none">• Updated model instructions (this page)• Minor formatting changes/typo corrections• Included criteria to align to updates to the model application:<ul style="list-style-type: none">○ High Quality Instructional Materials (Section 2, p. 5)○ Enrollment Policy that includes lottery description (Section 2, p. 11)○ Staff capacity for financial management (Section 4, p. 24)○ CMO/ESP information (Section 5, p. 29)• Updated success criteria numbering
April 7, 2021	<ul style="list-style-type: none">• Included success criteria related to existing organizations' years of operation (p. 28)• Added numbering to rubric criteria• Updated model instructions (this page)• Minor formatting changes/typo corrections
August 28, 2020	<ul style="list-style-type: none">• Original

Commented [DL1]: To do: renumber SC and updated SC appendix to match

Local Campus Application Rubric

Instructions for Evaluators:

1. In the [Evaluation Information](#) section, fill in your name, the name of the applicant group, and the name of the proposed school.
2. For each section of the application (sections 2-4 and 5, if applicable), you should do the following during your initial individual analysis of the proposal:
 - a. Highlight the elements of the success criteria that are met in the application and select a score under “Initial Review” for the success criteria (Meets, Partially Meets, or Does not Meet). *Note: a bulleted list of all success criteria can be found in the [appendix](#).*
 - b. Identify any missing or unclear evidence from the application in the “Areas for follow up in capacity interview” column under “Initial Review.” Be sure to include page references where applicable.
 - c. Select a subsection rating (Meets, Partially Meets, Does Not Meet):
 - i. The subsection ratings are included in the rows in gray above the success criteria for that subsection.
 - ii. The subsection rating should align to your success criteria ratings. For example, if there are four success criteria in a subsection, and an applicant only met two of those success criteria, you might select “Partially Meets” for your subsection rating.
3. Complete the [Application Summary Ratings](#) last.
 - a. Select the appropriate Section Summary Rating based on the ratings in each subsection.
 - b. Type a summary of your analysis of each section into the box provided. This should be a paragraph outlining the overall strengths or weaknesses of the application section as a whole. It should summarize your findings and should not be cut and pasted from your subsection analysis. Use this section to identify areas that should be explored during the capacity interview (if the applicant qualifies). Again, reference relevant page numbers.
4. If the applicant receives a score that qualifies them for a capacity interview:
 - a. Use the “After Capacity Interview” columns to provide your final evaluation of that success criteria based on the additional information you learn in the capacity interview.
 - b. Revise your subsection ratings and your [Application Summary Ratings](#) as needed.

Please note that your comments and evidence are as significant as your rating, and there should be clear alignment between the comments you provide and the rating you selected.

Evaluation Information

- Evaluators will use the following criteria to rate applicant responses.
- Ratings should be given based on tangible evidence provided in the application and/or capacity interview.
- Within each section, specific criteria define the expectations for a strong response that “Meets the Standard.” Evaluators will rate responses by applying the following guidance:

Meets the Standard: The response meets all of the criteria described in that section of the rubric. It reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information and evidence that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant’s capacity to carry out the plan effectively.

Partially Meets the Standard: The response meets some of the criteria or lacks detail and/or requires additional information in one or more areas.

<p>Does Not Meet the Standard: The response meets little to none of the criteria described in that section of the rubric, or it is wholly undeveloped or significantly incomplete; demonstrates lack of preparation and/or evidence; is unsuited to the mission of the authorizer or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.</p>		
<p>Evaluator Names: Orlando Riddick-HISD/Chief of Strategic Initiatives Office, Jacob Johnson – HISD/Chief of Schools Office-Central Division, Lizzette Cooper-HISD/Chief of Schools Office, Caitlin Butler-HISD/Chief of Staff Office, Lupita Hinojosa- ESC-4</p>	<p>Applicant Organization Name: Houston ISD – Friends of Energy Institute High School</p>	<p>Name of Campus(es): Energy Institute High School</p> <p>Campus Capacity Interview Team: Lori Lambropoulus-Campus Principal, Elizabeth Harris-Campus Assistant Principal, Rhett Davis-Friends of Energy Institute Board Member, and Julie Zachary- Friends of Energy Institute Board Member</p>
<p>Application Summary Ratings</p>		
<p>COMPLETE THIS SECTION LAST</p>		
<p>Score Required for Capacity Interview (this will be the same for all applicants): Click or tap here to enter text.</p> <p>Does this applicant qualify for a capacity interview? Yes, a capacity interview was conducted to provide more clarity and context</p>		
<p>Section 2- Academic Plan The academic plan is complete, viable, and appropriate for the campus(es)</p>	<p>☒ Meets ☐ Partially Meets ☐ Does Not Meet</p>	<p>Summary Comments/ Capacity Interview Topics:</p>
<p>Section 3- Governance, Operating Plan, and Capacity The applicant organization has the governance structure, operating plan, and capacity necessary to successfully manage the campus(es)</p>	<p>☒ Meets ☐ Partially Meets ☐ Does Not Meet</p>	<p>Summary Comments/Capacity Interview Topics:</p>
<p>Section 4- Financial Plan The applicant organization has a financial plan that ensures sound financial</p>	<p>☐ Meets ☒ Partially Meets – Having Finance review ☐ Does Not Meet</p>	<p>Summary Comments/Capacity Interview Topics:</p>

management of the campus(es)		
Section 5- Existing Partner/Experienced Partner Supplement The applicant organization has a successful track record and, if applicable, a sound ESP management plan	☐ Meets ☐ Partially Meets ☐ Does Not Meet N/A	Summary Comments/Capacity Interview Topics: N/A
Section 2: Academic Plan		
A. The response in this section is complete and cohesive	Meets ☒	Partially Meets ☐ Does Not Meet ☐
Success Criteria	<div> <div>Initial Review</div> <div>After Capacity Interview</div> </div>	
	Score Areas for follow up in capacity interview	Score Comments/Evidence for Final Recommendation
1. Applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet	☒ Meets ☐ Partially Meets ☐ Does Not Meet
2. Applicant included attachments 1 (if applicable), 2, and 3	☒ Meets ☐ Partially Meets ☐ Does Not Meet	☒ Meets ☐ Partially Meets ☐ Does Not Meet
3. The overall academic plan is coherent and aligned with the stated mission and vision	☒ Meets ☐ Partially Meets ☐ Does Not Meet	☒ Meets ☐ Partially Meets ☐ Does Not Meet
4. The overall academic plan is aligned to and likely to meet the needs identified by the district for this campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet	☒ Meets ☐ Partially Meets ☐ Does Not Meet
B. The applicant presented a clear plan to implement high-quality curriculum and effective instruction, and there is compelling justification and rationale for the curriculum and instruction plan	Meets ☒	Partially Meets ☐ Does Not Meet ☐
Success Criteria	Initial Review	
	After Capacity Interview	

	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
5. The applicant has selected a curriculum that is aligned to Texas standards	☒ Meets ☐ Partially Meets ☐ Does Not Meet	The PBL course is the only component of the scope and sequence	☒ Meets ☐ Partially Meets ☐ Does Not Meet	The team shared details about their summer planning along with exemplars. Adding this to their application
6. The applicant has developed or has a viable plan to develop a scope and sequence for each grade level and/or content area to be used at the school(s)	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Use an example of a Scope & Sequence and provide a link. HSPVA is an exemplar to see as an example.	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Using the TEKS map during the summer for interdisciplinary units and building this as through-line with your PLTW and PBL protocols
7. There is a plan for selecting and implementing High Quality Instructional Materials, and the applicant included what instructional materials will be used at the campus	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Add course specific hyperlinks. Add details on implementation	☒ Meets ☐ Partially Meets ☐ Does Not Meet	The explanation and details of using the PLTW curriculum and the applicable systems to support AP and Pre-AP courses
8. There is a plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	You shared details on PD and the curriculum being used
9. The applicant's framework for instructional design and strategies: <ul style="list-style-type: none"> reflects the needs of the school's target population ensures all students meet or exceed the expectations of Texas state standards 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Think through your entire student populations and tie to student outcomes	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Use the support provided to all special populations as a through-line in the application and in the instructional design on how they are supported and expected to perform with support to ensure they meet the campus expectations

• promotes critical-thinking skills				
10. There is a plan to identify and serve students with learning gaps	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Build out your special populations section	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
11. There is an appropriate plan to maximize instructional time	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
12. The applicant provided peer-reviewed research that backs up the program OR evidence of their experience with this program that includes metrics that demonstrate it has been successful	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
13. There is an explanation of how this curriculum and instruction framework create a rigorous, engaging, and high-quality educational experience for students that could be reasonably replicated for the student population at the proposed campus(es)	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
14. There is a valid description of why this model is likely to be effective for the anticipated student population at the proposed campus(es) that is compelling and aligned to the needs that the district has identified	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

C. (High Schools Only) The applicant presented an appropriate plan that ensures students meet graduation standards		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
15. The applicant included an attachment with exit standards for graduating students. This attachment: <ul style="list-style-type: none"> Is aligned to state high school graduation standards Includes what students in the last grade served will know and be able to do Includes how the applicant will ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce) 	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Consider adding grade specific requirements which would show a differentiation approach rather than just the required courses	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Updated with endorsements. Shared an exemplar.
16. The applicant described systems and procedures that the school will implement for students at risk of dropping out or not meeting exit standards that are likely to meet the needs of students at the proposed campus(es)	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Consider adding details regarding the teacher role in growth plans and additional details for a growth plan	☒ Meets ☐ Partially Meets ☐ Does Not Meet	The team provided clarity on supporting their academically at-risk population and how to address teachers in the growth plan as well. Using the magnet plan can support addressing student growth plan.
D. The applicant provided a plan and demonstrated capacity to serve students in special populations		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	

	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
17. The applicant provided an explanation of evidence from which the projection of anticipated special populations was derived that is reasonable given the district's student population	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
18. The organization or applicant team has experience in fulfilling state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
19. The applicant provided rationale for their understanding of and ongoing capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
20. The applicant included a plan for providing services to students in special education. The plan demonstrates that the applicant will successfully: <ul style="list-style-type: none"> appropriately identify students for special education services 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Add specific required trainings for teachers and then what they will do next for implementation	☒ Meets ☐ Partially Meets ☐ Does Not Meet	You detailed plans for PD data systems, assessemnts and the process and steps to serve, dentify and support students in their academic steps

<ul style="list-style-type: none"> • serve students in the least-restrictive environment possible • provide appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities • provide the required and appropriate support services as outlined in students' Individualized Education Plans and 504 plans • ensure that students receiving special education services participate in standardized testing 				
<p>21. The applicant included a plan for providing services to emergent bilingual students. The plan demonstrates that the applicant will successfully:</p> <ul style="list-style-type: none"> • employ specific instructional programs, practices, and strategies to ensure academic success and equitable access to the general education curriculum and core academic program for emergent bilingual students 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	<p>Add specific required trainings for teachers and then what they will do next for implementation</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet	<p>Similar to question 20: You detailed plans for PD, data systems, assessemnts and the process and steps to serve, dentify and support students in their academic steps</p>

<ul style="list-style-type: none"> monitor and evaluate student progress and success of emergent bilingual students and exit them from services as appropriate include emergent bilingual students in standardized testing include emergent bilingual students in school wide educational, extra-curricular, and culture-building activities 				
22. The applicant included a plan for providing services to students identified as intellectually gifted. The plan demonstrates that the applicant will successfully: <ul style="list-style-type: none"> identify students provide specific instructional programs, practices, and strategies aligned to the needs of these students 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
E. The applicant provided a sound plan for student recruitment and enrollment		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
23. The applicant provided a student recruitment and marketing plan that includes safeguards for equal inclusion of all interested	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Specifically address addressing students in poverty, students who struggle, at-risk and w/disabilities	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Team explained in detail the use of HISD heat maps in recruit strategy, recruiting the city, picking also specific ares in particular communities other high schools do not go to visits middle schools. The team shared how they

students and families, including: <ul style="list-style-type: none"> those in poverty students who have struggled academically students with disabilities, and other youth at risk of academic failure 				target students who struggle academically
24. The applicant attached an Enrollment Policy that complies with state law and includes a lottery policy if more students choose to enroll at the campus than can accommodate	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	Provided the narrative not just using the attachment as information
25. The applicant's Enrollment Policy includes safeguards or policies that ensure that the school will be open to all eligible students	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
F. The applicant provided a compelling plan for creating a positive school culture		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
26. The applicant described a vision for the culture of the school(s) that is aligned to the needs the district identified in its Call for Quality Schools	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
27. The applicant's vision for the school: <ul style="list-style-type: none"> promotes high expectations 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • will reasonably establish a positive and safe academic environment • will reasonably create shared ownership of intellectual and social development for all students, including those with special needs, ELs, and students at risk of academic failure 				
<p>28. The applicant included a plan for establishing the intended culture. This plan includes processes and procedures to:</p> <ul style="list-style-type: none"> • develop a common understanding of the intended school culture among staff and students • identify how the intended culture is put in practice and made evident in the daily life of the school • regularly assess and measure progress on student and staff experiences and course-correct when expected progress is not being made 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Address how you will course correct in the event you are not making progress	☒ Meets ☐ Partially Meets ☐ Does Not Meet	<p>Shared the use of “pulse checks” naming who will responsible with clear next steps.</p> <p>You team shared how you address the student and family experience and how you build intervals of interaction</p> <p>You shared using surveys as a point of information and shared the role of leadership through the data collected and adding this to support the narrative of culture for the campus.</p>
<p>29. The applicant included a plan for family engagement. This plan:</p> <ul style="list-style-type: none"> • includes methods the applicant will use to 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

create an inclusive and welcoming environment <ul style="list-style-type: none"> is likely to engage families in positive, constructive, and personalized ways 				
30. The applicant included a plan for providing student support services (e.g., counseling, mentoring, external service referrals) that includes: <ul style="list-style-type: none"> a program to proactively teach mental health and wellness skills to all students a process for staff to meet frequently to identify and monitor individual student needs a process to identify support service providers and to connect students with the support services (e.g., counseling, mentoring, external service referrals) that address their needs 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Your “proactive” bullet needs to be addressed	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Your team provided more context on the process to proactively support students' mental health and how you do this before, during and after a student is identified.
31. The applicant included the systems and processes the school will use for tracking discipline referrals and interventions, including how they will identify trends and adapt activities accordingly	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>32. The applicant attached the student discipline policy/code of conduct for the proposed campus(es). This policy or code includes:</p> <ul style="list-style-type: none"> • appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture • legally sound policies for student discipline, suspension, and expulsion • protection of students' rights to due process 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
G. The applicant provided an assessment and evaluation plan that demonstrates their ability to track student progress		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
<p>33. The applicant included annual student performance goals that:</p> <ul style="list-style-type: none"> • include targets aligned with the state accountability system • meet the needs/desired outcomes the district wants to achieve with this partnership 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>34. The applicant included a plan (including the meeting structures and frequency) to</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

implement and interpret interim assessments that measure academic progress toward these annual goals throughout the school year				
<p>35. The applicant included a plan and system for collecting and analyzing student academic achievement data that includes:</p> <ul style="list-style-type: none"> • methods to report data to the school community that ensure that stakeholders have equal access to the information • processes and procedures to use the data to refine and improve instruction that include: <ul style="list-style-type: none"> ○ dedicated, scheduled time to provide training and support to school leadership and teachers in the use of data to improve instruction ○ qualified personnel to provide this training and support for school leaders and teachers 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
36. The applicant included corrective actions that they will take if they fall short of the academic goals stated in this section.	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Address when goals aren't met your corrective action.	☒ Meets ☐ Partially Meets ☐ Does Not Meet	You shared the process in which your team will address falling short academically and how they monitor this throughout the year.

There is a plan to take corrective action for both annual and interim goals that includes: <ul style="list-style-type: none"> a clear explanation of what would trigger such actions who would implement the corrective actions 				You shared how your team will respond to self-correct and who is responsible.
Section 3: Governance, Operating Plan, and Capacity				
H. The response in this section is complete and cohesive		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
37. The applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
38. The applicant included attachments 4-9	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
39. The overall governance structure and operations plan is: <ul style="list-style-type: none"> coherent aligned with the stated mission and vision aligned with the academic plan (section 2) aligned with the finance plan (section 4) 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
40. The overall governance plan is aligned to and likely to meet the needs identified by the district for this campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

I. The applicant organization is an eligible entity and includes sufficient staff to manage the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
41. The attached organizational chart indicates that the organization has already employed staff that will be engaged in daily, on-site school management routines	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Align roles in org chart to the narrative throughout the application	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
42. The daily responsibilities described in the chart include daily on-site school management routines that match the needs of the campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
43. The organization is one of the following eligible entities: <ul style="list-style-type: none"> • open-enrollment charter school • an institution of higher education as defined under Section 61.003 of the Texas Education Code (TEC),] • a private or independent institution of higher education as defined under TEC Section 61.003, or • an organization that is exempt from taxation under Section 501(c)(3) of the Internal Revenue Code 	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	

J. The applicant organization's board is independent of the district, meets legal requirements, and includes qualified members		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
44. The partner organization board is made up of at least three members	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
45. The partner organization board does not include any members of the district's board, the district superintendent, OR any members that are district employees involved in the selection or oversight of the district charter partnership	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
46. The bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances provided by the potential partner assure the current and ongoing independence of the partner board from the district board	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
47. The board member information sheets and resumes for each proposed board member demonstrate that, collectively, the board members have demonstrated experience and success in:	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> the implementation and oversight of education programs financial oversight of schools and/or non-profit organizations implementing legal requirements for schools and/or non-profit organizations community engagement 				
<p>48. The applicant included a plan to grow and/or sustain board membership, including:</p> <ul style="list-style-type: none"> a description of the education, finance, law, and community engagement and other qualifications that current or future board members must possess a plan to recruit board members with the necessary experiences in education, finance, law, and community engagement described in the preceding bullet point proposed training requirements and an orientation plan for new board members proposed ongoing training requirements for board members that will ensure their continued 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

ability to govern charter campuses within the district				
49. The applicant described how the board will evaluate the success of the school(s) and school leader(s), including: <ul style="list-style-type: none"> the criteria by which the board will evaluate the school(s) and leader(s) meetings that occur frequently enough for the board to have an understanding of the school and leader's performance the roles and responsibilities of any standing committees 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Add more details on performance management with expected goals and percentages	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Shared the performance metrics needed to support the campus and leader and the through-line between the performance contract metrics as an example the continuing of meeting TEA's accountability of an A and closing the achievement gap
K. The applicant team has the necessary experience and capacity to manage the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
50. The applicant team is comprised of members with experience and measurable success in school leadership, administration, and governance	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
51. The applicant team is comprised of members with experience and measurable success in implementing systems for curriculum, instruction, and assessment	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

52. The applicant team is comprised of members with experience and measurable success in performance management	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Add details on who is addressing performance management	☒ Meets ☐ Partially Meets ☐ Does Not Meet	You shared clarity on who is addressing the appraisal and that all team members are part of the evaluation of staff and the process for ensuring this as the leader.
53. The applicant team is composed of members with experience and measurable success in parent and community engagement	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Written in a broad and general format, add context and details	☒ Meets ☐ Partially Meets ☐ Does Not Meet	The team addressed the parent activities throughout the year in a rubric with more details and will add to the application.
54. The proposed school leader has experience in and demonstrated ability to design, launch, and lead a school and implement the specific educational program being proposed OR the board has a plan (with appropriate timeline) to recruit and retain a leader with the ability to implement the specific educational program being proposed	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
55. The applicant provided measurable performance expectations for the school leader that are: <ul style="list-style-type: none"> aligned to the mission of the school aligned to a trajectory of improved student outcomes for the specific campus or campuses to be operated by the organization appropriate for both the school launch in the first year of operation to 	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Consider adding specific metrics	☒ Meets ☐ Partially Meets ☐ Does Not Meet	The performance contract has metrics to include that go from maintaining your current TEA accountability of an A to closing the achievement gap.

sustainability of improved outcomes in future years				
L. The applicant has a clear plan to recruit and retain quality staff at the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
56. The applicant's recruitment and hiring strategy includes: <ul style="list-style-type: none"> • criteria and protocols for hiring for all campus roles • predetermined selection criteria that demonstrate high standards • selection criteria aligned to the mission and academic program the school will offer • a hiring protocol and timeline that ensure that the school is fully staffed by July 1 of each year 	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Consider adding narrative to the application	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
57. The applicant's staff development and retention plan includes: <ul style="list-style-type: none"> • an induction program that is tailored to any unique or particularly challenging aspects of the educational program described in Section 2 • the method the applicant will use to evaluate teacher performance and 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>growth, including the evaluation tools and processes to be used</p> <ul style="list-style-type: none"> the method, resources, and timeline that the applicant will use to support school staff personnel with demonstrated experience and qualifications to provide professional development and facilitate adult learning how the applicant will identify and retain high-performing staff 				
<p>58. The applicant described a process for remedying unsatisfactory leadership and/or teacher performance that includes:</p> <ul style="list-style-type: none"> how underperforming staff are identified the steps and documentation that the applicant will take and collect to remedy the performance if the school staff will remain district employees, how the applicant will work with the district to change the assignment of the staff 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
M. The applicant has a valid facilities plan	Meets ☒		Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	

	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
59. The application identifies an appropriate and viable proposed school facility, or the application includes a facilities plan. If the application includes a facilities plan, the plan includes: <ul style="list-style-type: none"> the timeline for identifying the facility how the facility will be financed how the applicant will renovate and/or ensure code compliance for a facility how the facilities plan will meet the requirements of the educational program and anticipated student population 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
Section 4: Financial Plan				
N. The response in this section is complete and cohesive		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
60. The applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
61. The applicant included attachment 10	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

62. The overall financial plan is: <ul style="list-style-type: none"> coherent aligned with the stated mission and vision aligned with the academic plan (section 2) aligned with the governance and operations plan (section 3) 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Having Finance Review	☒ Meets ☐ Partially Meets ☐ Does Not Meet	We discussed as we move closer to the end of month clarity on the budget that was provided will better inform decisions drafted in the application. As of right now your current budget and preliminary budget provide operational needs as is.
O. The applicant demonstrated that the organization has the capacity, processes, and personnel necessary to meet the financial needs of managing the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
63. The applicant's description of the organization's systems, policies, and processes for financial planning, accounting, purchasing, and payroll that are aligned with and will allow the school to meet financial accountability requirements	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
64. The applicant organization has (or has plans to hire) staff the with necessary qualifications to manage the organization's financial systems, policies, and processes	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
65. The application describes: <ul style="list-style-type: none"> the organization's internal controls that 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>meet the standard outlined in the Financial Accountability System Resource Guide (Module 2: Special Supplement – Charter Schools)</p> <ul style="list-style-type: none"> the applicant’s knowledge of and ability to meet financial reporting requirements how the applicant will conduct independent annual financial and administrative audits that meet district requirements 				
66. The financial plan describes roles and responsibilities among the administration and governing board regarding school finance that align with the internal controls described in the preceding criteria	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
67. The financial plan includes the methods the applicant will employ to publicly adopt the school’s budget and disseminate its annual audit and an annual report	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
68. The operating budget and narrative include reasonable: <ul style="list-style-type: none"> grant/fundraising assumptions, amount and sources of all anticipated funds, property, or other 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable), and				
<ul style="list-style-type: none"> projected cost to implement the academic model described in this application 				
69. The organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated includes: <ul style="list-style-type: none"> how the organization will identify the specific areas of financial weakness what corrective actions the organization will take to remedy specific areas of financial weakness and/or how a corrective action plan will be developed how the organization will ensure a contingency or corrective action plan is successfully implemented 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
Section 5: Existing Partner/Experienced Partner Supplement N/A				
P. The response in this section is complete and cohesive		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation

70. The applicant responded to all questions in this section	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
71. The applicant included supplemental attachments 1 and 2, and supplemental attachment 3 (if applicable)	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
72. The supplemental information demonstrates the organization has experience and success in implementing the model described in the rest of the application	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
Q. The applicant has demonstrated a successful academic and financial track record		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
73. The applicant provided evidence of measurable success in: <ul style="list-style-type: none"> • academic success • serving populations similar to the population the applicant intends to serve • successful management of non-academic school functions (e.g., back-office services, school operations, extracurricular programs) 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
74. The applicant's independent financial audit report and its most recent annual report of the	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>experienced partner applicant or ESP/CMO:</p> <ul style="list-style-type: none"> • demonstrates the financial health of the organization • provides reasonable assurance that the organization will maintain this financial health when operating the proposed campus(es) in this district 				
<p>75. The applicant does not have a history of charter revocations, non-renewals, withdrawals, or failures to open</p>	☐ Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Does Not Meet	
<p>76. If the applicant is partnering with an F rated campus, the applicant has:</p> <ul style="list-style-type: none"> • Been in existence for at least three years prior to undertaking the management of the district campus • Managed multiple campuses for multiple years • Has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses 		N/A		

R. If applicable, the applicant provided a clear Education Service Provider (ESP) or Charter Management Organization (CMO) plan		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
77. The management agreement between the ESP or CMO and the applicant organization includes: <ul style="list-style-type: none"> a detailed description of the roles and responsibilities of the ESP or CMO a detailed explanation of the scope of services and costs of all resources to be provided by the ESP or CMO a detailed description of the oversight and evaluation methods that the board will use to oversee the ESP or CMO, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP's or CMO's progress toward achieving agreed-upon goals 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • a detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory • a detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP or CMO and the schedule on which the ESP or CMO will receive compensation • a detailed explanation of the financial responsibilities of the ESP or CMO, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP or CMO can make without obtaining board approval, and what reports the ESP or CMO will submit to the board on financial performance and on what schedule 				
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<ul style="list-style-type: none"> • a detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP or CMO and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed • a detailed description of the grounds for which the ESP/CMO or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause • an explanation and justification of any indemnification provisions in the event of default or breach by either party 				
78. The applicant included a plan for the operation of the	☐ Meets	N/A	☐ Meets	

school in the case that the management agreement is terminated that includes how this plan would be enforced and carried out	☐ Partially Meets ☐ Does Not Meet		☐ Partially Meets ☐ Does Not Meet	
79. The applicant included: <ul style="list-style-type: none"> assurance that the board is independent from the ESP or CMO and self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed ESP or any affiliated business entities evidence of the board's independence 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
80. The applicant included a clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP/CMO supervisory responsibilities	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
81. The applicant included a detailed explanation and	☐ Meets		☐ Meets	

compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement	☐ Partially Meets ☐ Does Not Meet		☐ Partially Meets ☐ Does Not Meet	
82. The applicant included a detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused by the school	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

Section 2: Academic Plan

A. The response in this section is complete and cohesive

1. Applicant responded to all questions in this section
2. Applicant included attachments 1 (if applicable), 2, and 3
3. The overall academic plan is coherent and aligned with the stated mission and vision
4. The overall academic plan is aligned to and likely to meet the needs identified by the district for this campus

B. The applicant presented a clear plan to implement high-quality curriculum and effective instruction, and there is compelling justification and rationale for the curriculum and instruction plan

5. The applicant has selected a curriculum that is aligned to Texas standards
6. The applicant has developed or has a viable plan to develop a scope and sequence for each grade level and/or content area to be used at the school(s)
7. There is a plan for selecting and implementing High Quality Instructional Materials, and the applicant included what instructional materials will be used at the campus
8. There is a plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials
9. The applicant's framework for instructional design and strategies:
 - reflects the needs of the school's target population
 - ensures all students meet or exceed the expectations of Texas state standards
 - promotes critical-thinking skills
10. There is a plan to identify and serve students with learning gaps
11. There is an appropriate plan to maximize instructional time
12. The applicant provided peer-reviewed research that backs up the program OR evidence of their experience with this program that includes metrics that demonstrate it has been successful
13. There is an explanation of how this curriculum and instruction framework create a rigorous, engaging, and high-quality educational experience for students that could be reasonably replicated for the student population at the proposed campus(es)
14. There is a valid description of why this model is likely to be effective for the anticipated student population at the proposed campus(es) that is compelling and aligned to the needs that the district has identified

C. (High Schools Only) The applicant presented an appropriate plan that ensures students meet graduation standards

15. The applicant included an attachment with exit standards for graduating students. This attachment:
 - Is aligned to [state high school graduation standards](#)
 - Includes what students in the last grade served will know and be able to do
 - Includes how the applicant will ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce)

16. The applicant described systems and procedures that the school will implement for students at risk of dropping out or not meeting exit standards that are likely to meet the needs of students at the proposed campus(es)

D. The applicant provided a plan and demonstrated capacity to serve students in special populations

17. The applicant provided an explanation of evidence from which the projection of anticipated special populations was derived that is reasonable given the district's student population
18. The organization or applicant team has experience in fulfilling state and federal obligations and requirements pertaining to students with disabilities, ELs, and students identified as intellectually gifted
19. The applicant provided rationale for their understanding of and ongoing capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, ELs, and students identified as intellectually gifted
20. The applicant included a plan for providing services to students in special education. The plan demonstrates that the applicant will successfully:
- appropriately identify students for special education services
 - serve students in the least-restrictive environment possible
 - provide appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities
 - provide the required and appropriate support services as outlined in students' Individualized Education Plans and 504 plans
 - ensure that students receiving special education services participate in standardized testing
21. The applicant included a plan for providing services to English Learners (ELs). The plan demonstrates that the applicant will successfully:
- employ specific instructional programs, practices, and strategies to ensure academic success and equitable access to the general education curriculum and core academic program for ELs
 - monitor and evaluate student progress and success of ELs and exit them from services as appropriate
 - include ELs in standardized testing
 - include ELs in school wide educational, extra-curricular, and culture-building activities
22. The applicant included a plan for providing services to students identified as intellectually gifted. The plan demonstrates that the applicant will successfully:
- identify students
 - provide specific instructional programs, practices, and strategies aligned to the needs of these students

E. The applicant provided a sound plan for student recruitment and enrollment

23. The applicant provided a student recruitment and marketing plan that includes safeguards for equal inclusion of all interested students and families, including:
- those in poverty
 - students who have struggled academically
 - students with disabilities, and
 - other youth at risk of academic failure
24. The applicant attached an Enrollment Policy that complies with [state law](#) and includes a lottery policy if more students choose to enroll at the campus than can accommodated
25. The applicant's Enrollment Policy includes safeguards or policies that ensure that the school will be open to all eligible students

F. The applicant provided a compelling plan for creating a positive school culture

26. The applicant described a vision for the culture of the school(s) that is aligned to the needs the district identified in its Call for Quality Schools
27. The applicant's vision for the school:
- promotes high expectations
 - will reasonably establish a positive and safe academic environment
 - will reasonably create shared ownership of intellectual and social development for all students, including those with special needs, ELs, and students at risk of academic failure
28. The applicant included a plan for establishing the intended culture. This plan includes processes and procedures to:
- develop a common understanding of the intended school culture among staff and students
 - identify how the intended culture is put in practice and made evident in the daily life of the school
 - regularly assess and measure progress on student and staff experiences and course-correct when expected progress is not being made
29. The applicant included a plan for family engagement. This plan:
- includes methods the applicant will use to create an inclusive and welcoming environment
 - is likely to engage families in positive, constructive, and personalized ways
30. The applicant included a plan for providing student support services (e.g., counseling, mentoring, external service referrals) that includes:
- a program to proactively teach mental health and wellness skills to all students
 - a process for staff to meet frequently to identify and monitor individual student needs
 - a process to identify support service providers and to connect students with the support services (e.g., counseling, mentoring, external service referrals) that address their needs
31. The applicant included the systems and processes the school will use for tracking discipline referrals and interventions, including how they will identify trends and adapt activities accordingly
32. The applicant attached the student discipline policy/code of conduct for the proposed campus(es). This policy or code includes:
- appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture
 - legally sound policies for student discipline, suspension, and expulsion
 - protection of students' rights to due process

G. The applicant provided an assessment and evaluation plan that demonstrates their ability to track student progress

33. The applicant included annual student performance goals that:
- include targets aligned with the state accountability system
 - meet the needs/desired outcomes the district wants to achieve with this partnership
34. The applicant included a plan (including the meeting structures and frequency) to implement and interpret interim assessments that measure academic progress toward these annual goals throughout the school year
35. The applicant included a plan and system for collecting and analyzing student academic achievement data that includes:
- methods to report data to the school community that ensure that stakeholders have equal access to the information

- processes and procedures to use the data to refine and improve instruction that include:
 - dedicated, scheduled time to provide training and support to school leadership and teachers in the use of data to improve instruction
 - qualified personnel to provide this training and support for school leaders and teachers
36. The applicant included corrective actions that they will take if they fall short of the academic goals stated in this section.
- There is a plan to take corrective action for both annual and interim goals that includes:
- a clear explanation of what would trigger such actions
 - who would implement the corrective actions

Section 3: Governance, Operating Plan, and Capacity

H. The response in this section is complete and cohesive

37. The applicant responded to all questions in this section
38. The applicant included attachments 4-9
39. The overall governance structure and operations plan is:
- coherent
 - aligned with the stated mission and vision
 - aligned with the academic plan (section 2)
 - aligned with the finance plan (section 4)
40. The overall governance plan is aligned to and likely to meet the needs identified by the district for this campus

I. The applicant organization is an eligible entity and includes sufficient staff to manage the campus(es)

41. The attached organizational chart indicates that the organization has already employed staff that will be engaged in daily, on-site school management routines
42. The daily responsibilities described in the chart include daily, on-site school management routines that match the needs of the campus
43. The organization is one of the following:
- open-enrollment charter school
 - an institution of higher education as defined under Section 61.003 of the Texas Education Code (TEC),]
 - a private or independent institution of higher education as defined under TEC Section 61.003, or
 - an organization that is exempt from taxation under Section 501(c)(3) of the Internal Revenue Code

J. The applicant organization's board is independent of the district, meets legal requirements, and includes qualified members

44. The partner organization board is made up of at least three members
45. The partner organization board does not include any members of the district's board, the district superintendent, OR any members that are district employees involved in the selection or oversight of the district charter partnership
46. The bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances provided by the potential partner assure the current and ongoing independence of the partner board from the district board

47. The board member information sheets and resumes for each proposed board member demonstrate that, collectively, the board members have demonstrated experience and success in:
- the implementation and oversight of education programs
 - financial oversight of schools and/or non-profit organizations
 - implementing legal requirements for schools and/or non-profit organizations
 - community engagement
48. The applicant included a plan to grow and/or sustain board membership, including:
- a description of the education, finance, law, and community engagement and other qualifications that current or future board members must possess
 - a plan to recruit board members with the necessary experiences in education, finance, law, and community engagement described in the preceding bullet point
 - proposed training requirements and an orientation plan for new board members
 - proposed ongoing training requirements for board members that will ensure their continued ability to govern charter campuses within the district
49. The applicant described how the board will evaluate the success of the school(s) and school leader(s), including:
- the criteria by which the board will evaluate the school(s) and leader(s)
 - meetings that occur frequently enough for the board to have an understanding of the school and leader's performance
 - the roles and responsibilities of any standing committees

K. The applicant team has the necessary experience and capacity to manage the campus(es)

50. The applicant team is comprised of members with experience and measurable success in school leadership, administration, and governance
51. The applicant team is comprised of members with experience and measurable success in implementing systems for curriculum, instruction, and assessment
52. The applicant team is comprised of members with experience and measurable success in performance management
53. The applicant team is composed of members with experience and measurable success in parent and community engagement
54. The proposed school leader has experience in and demonstrated ability to design, launch, and lead a school and implement the specific educational program being proposed OR the board has a plan (with appropriate timeline) to recruit and retain a leader with the ability to implement the specific educational program being proposed
55. The applicant provided measurable performance expectations for the school leader that are:
- aligned to the mission of the school
 - aligned to a trajectory of improved student outcomes for the specific campus or campuses to be operated by the organization
 - appropriate for both the school launch in the first year of operation to sustainability of improved outcomes in future years

L. The applicant has a clear plan to recruit and retain quality staff at the campus(es)

56. The applicant's recruitment and hiring strategy includes:
- criteria and protocols for hiring for all campus roles
 - predetermined selection criteria that demonstrate high standards

- selection criteria aligned to the mission and academic program the school will offer
 - a hiring protocol and timeline that ensure that the school is fully staffed by July 1 of each year
57. The applicant's staff development and retention plan includes:
- an induction program that is tailored to any unique or particularly challenging aspects of the educational program described in Section 2
 - the method the applicant will use to evaluate teacher performance and growth, including the evaluation tools and processes to be used
 - the method, resources, and timeline that the applicant will use to support school staff
 - personnel with demonstrated experience and qualifications to provide professional development and facilitate adult learning
 - how the applicant will identify and retain high-performing staff
58. The applicant described a process for remedying unsatisfactory leadership and/or teacher performance that includes:
- how underperforming staff are identified
 - the steps and documentation that the applicant will take and collect to remedy the performance
 - if the school staff will remain district employees, how the applicant will work with the district to change the assignment of the staff

M. The applicant has a valid facilities plan

59. The application identifies an appropriate and viable proposed school facility, or the application includes a facilities plan. If the application includes a facilities plan, the plan includes:
- the timeline for identifying the facility
 - how the facility will be financed
 - how the applicant will renovate and/or ensure code compliance for a facility
 - how the facilities plan will meet the requirements of the educational program and anticipated student population

Section 4: Financial Plan

N. The response in this section is complete and cohesive

60. The applicant responded to all questions in this section
61. The applicant included attachment 10
62. The overall financial plan is:
- coherent
 - aligned with the stated mission and vision
 - aligned with the academic plan (section 2)
 - aligned with the governance and operations plan (section 3)

O. The applicant demonstrated that the organization has the capacity, processes, and personnel necessary to meet the financial needs of managing the campus(es)

63. The applicant's description of the organization's systems, policies, and processes for financial planning, accounting, purchasing, and payroll that are aligned with and will allow the school to meet [financial accountability](#) requirements

64. The applicant organization has (or has plans to hire) staff the with necessary qualifications to manage the organization’s financial systems, policies, and processes
65. The application describes:
- the organization’s internal controls that meet the standard outlined in the Financial Accountability System Resource Guide ([Module 2: Special Supplement – Charter Schools](#))
 - the applicant’s knowledge of and ability to meet financial reporting requirements
 - how the applicant will conduct independent annual financial and administrative audits that meet district requirements
66. The financial plan describes roles and responsibilities among the administration and governing board regarding school finance that align with the internal controls described in the preceding criteria
67. The financial plan includes the methods that the applicant will employ to publicly adopt the school’s budget and disseminate its annual audit and an annual report
68. The operating budget and narrative include reasonable:
- grant/fundraising assumptions,
 - amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable), and
 - projected cost to implement the academic model described in this application
69. The organization’s contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated includes:
- how the organization will identify the specific areas of financial weakness
 - what corrective actions the organization will take to remedy specific areas of financial weakness and/or how a corrective action plan will be developed
 - how the organization will ensure that a contingency or corrective action plan is successfully implemented

Section 5: Existing Partner/Experienced Partner Supplement

P. The response in this section is complete and cohesive

70. The applicant responded to all questions in this section
71. The applicant included supplemental attachments 1 and 2, and supplemental attachment 3 (if applicable)
72. The supplemental information demonstrates that the organization has experience and success in implementing the model described in the rest of the application

Q. The applicant has demonstrated a successful academic and financial track record

73. The applicant provided evidence of measurable success in:
- academic success
 - serving populations similar to the population that the applicant intends to serve
 - successful management of non-academic school functions (e.g., back- office services, school operations, extracurricular programs)
74. The applicant’s independent financial audit report and its most recent annual report of the experienced partner applicant or ESP:

- demonstrates the financial health of the organization
 - provides reasonable assurance that the organization will maintain this financial health when operating the proposed campus(es) in this district
75. The applicant does not have a history of charter revocations, non-renewals, withdrawals, or failures to open
76. If the applicant is partnering with an F rated campus, the applicant has:
- Been in existence for at least three years prior to undertaking the management of the district campus
 - Managed multiple campuses for multiple years
 - Has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses
- R. If applicable, the applicant provided a clear Education Service Provider (ESP) or Charter Management Organization (CMO) plan**
77. The management agreement between the ESP/CMO and the applicant organization includes:
- a detailed description of the roles and responsibilities of the ESP/CMO
 - a detailed explanation of the scope of services and costs of all resources to be provided by the ESP/CMO
 - a detailed description of the oversight and evaluation methods that the board will use to oversee the ESP/CMO, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP/CMO's progress toward achieving agreed-upon goals
 - a detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory
 - a detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP/CMO and the schedule on which the ESP/CMO will receive compensation
 - a detailed explanation of the financial responsibilities of the ESP/CMO, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP/CMO can make without obtaining board approval, and what reports the ESP/CMO will submit to the board on financial performance and on what schedule
 - a detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP/CMO and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed
 - a detailed description of the grounds for which the ESP/CMO or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause
 - an explanation and justification of any indemnification provisions in the event of default or breach by either party
78. The applicant included a plan for the operation of the school in the case that the management agreement is terminated that includes how this plan would be enforced and carried out
79. The applicant included:
- assurance that the board is independent from the ESP/CMO and self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed ESP/CMO or any affiliated business entities
 - evidence of the board's independence
80. The applicant included a clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP/CMO supervisory responsibilities

81. The applicant included a detailed explanation and compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement
82. The applicant included a detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused by the school

Instructions for using the TEA Model Local Campus Partner Application Scoring Rubric

Districts may use this model scoring rubric or create their own. Districts that create their own rubric to vet potential operating partners must have the locally created rubric approved as part of the benefits application process.

- If this rubric is altered, the locally developed rubric **MUST** be submitted to TEA by the following due dates (emailed to TXP@tea.texas.gov) as part of the benefits approval process:
 - Friday, December 5, 2025, at 5 p.m. (Central Time), OR
 - No later than 5 days prior to the release of the district's local campus application (whichever date is sooner).

Last updated May 1, 2023.

TEA will not amend model documents (other than for formatting or typos) between the time that the To the Administrator Addressed letter is released and the current year due date.

Revision history:

Date of Update	Revision Summary
May 1, 2023	<ul style="list-style-type: none">• Updated model instructions (this page)• Minor formatting changes/typo corrections• Included criteria to align to updates to the model application:<ul style="list-style-type: none">○ High Quality Instructional Materials (Section 2, p. 5)○ Enrollment Policy that includes lottery description (Section 2, p. 11)○ Staff capacity for financial management (Section 4, p. 24)○ CMO/ESP information (Section 5, p. 29)• Updated success criteria numbering
April 7, 2021	<ul style="list-style-type: none">• Included success criteria related to existing organizations' years of operation (p. 28)• Added numbering to rubric criteria• Updated model instructions (this page)• Minor formatting changes/typo corrections
August 28, 2020	<ul style="list-style-type: none">• Original

Commented [DL1]: To do: renumber SC and updated SC appendix to match

Local Campus Application Rubric

Instructions for Evaluators:

1. In the [Evaluation Information](#) section, fill in your name, the name of the applicant group, and the name of the proposed school.
2. For each section of the application (sections 2-4 and 5, if applicable), you should do the following during your initial individual analysis of the proposal:
 - a. Highlight the elements of the success criteria that are met in the application and select a score under “Initial Review” for the success criteria (Meets, Partially Meets, or Does not Meet). *Note: a bulleted list of all success criteria can be found in the [appendix](#).*
 - b. Identify any missing or unclear evidence from the application in the “Areas for follow up in capacity interview” column under “Initial Review.” Be sure to include page references where applicable.
 - c. Select a subsection rating (Meets, Partially Meets, Does Not Meet):
 - i. The subsection ratings are included in the rows in gray above the success criteria for that subsection.
 - ii. The subsection rating should align to your success criteria ratings. For example, if there are four success criteria in a subsection, and an applicant only met two of those success criteria, you might select “Partially Meets” for your subsection rating.
3. Complete the [Application Summary Ratings](#) last.
 - a. Select the appropriate Section Summary Rating based on the ratings in each subsection.
 - b. Type a summary of your analysis of each section into the box provided. This should be a paragraph outlining the overall strengths or weaknesses of the application section as a whole. It should summarize your findings and should not be cut and pasted from your subsection analysis. Use this section to identify areas that should be explored during the capacity interview (if the applicant qualifies). Again, reference relevant page numbers.
4. If the applicant receives a score that qualifies them for a capacity interview:
 - a. Use the “After Capacity Interview” columns to provide your final evaluation of that success criteria based on the additional information you learn in the capacity interview.
 - b. Revise your subsection ratings and your [Application Summary Ratings](#) as needed.

Please note that your comments and evidence are as significant as your rating, and there should be clear alignment between the comments you provide and the rating you selected.

Evaluation Information

- Evaluators will use the following criteria to rate applicant responses.
- Ratings should be given based on tangible evidence provided in the application and/or capacity interview.
- Within each section, specific criteria define the expectations for a strong response that “Meets the Standard.” Evaluators will rate responses by applying the following guidance:

Meets the Standard: The response meets all of the criteria described in that section of the rubric. It reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information and evidence that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant’s capacity to carry out the plan effectively.

Partially Meets the Standard: The response meets some of the criteria or lacks detail and/or requires additional information in one or more areas.

<p>Does Not Meet the Standard: The response meets little to none of the criteria described in that section of the rubric, or it is wholly undeveloped or significantly incomplete; demonstrates lack of preparation and/or evidence; is unsuited to the mission of the authorizer or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.</p>		
<p>Evaluator Names: Orlando Riddick-HISD, Jacob Johnson – HISD/Central Division, Lizzette Cooper-HISD/Schools Office, Caitlin Butler- HISD/Chief of Staff, and Lupita Hinojosa- ESC- Region 4</p>	<p>Applicant Organization Name: Houston ISD</p>	<p>Name of Campus(es): Houston Academy of International Studies</p> <p>Campus Capacity Interview Team: Melissa Jacobs-HISD/Campus Principal, Brian Gaston/Friends of HAIS Board Member, and Brenda Rangel/Friends of HAIS Board Member</p>
<p>Application Summary Ratings</p>		
<p>COMPLETE THIS SECTION LAST</p>		
<p>Score Required for Capacity Interview (this will be the same for all applicants): Click or tap here to enter text.</p> <p>Does this applicant qualify for a capacity interview? Click or tap here to enter text.</p>		
<p>Section 2- Academic Plan The academic plan is complete, viable, and appropriate for the campus(es)</p>	<p>☒ Meets ☐ Partially Meets ☐ Does Not Meet</p>	<p>Summary Comments/ Capacity Interview Topics:</p>
<p>Section 3- Governance, Operating Plan, and Capacity The applicant organization has the governance structure, operating plan, and capacity necessary to successfully manage the campus(es)</p>	<p>☒ Meets ☐ Partially Meets ☐ Does Not Meet</p>	<p>Summary Comments/Capacity Interview Topics:</p>
<p>Section 4- Financial Plan The applicant organization has a financial plan that ensures sound financial management of the campus(es)</p>	<p>☒ Meets ☐ Partially Meets ☐ Does Not Meet</p>	<p>Summary Comments/Capacity Interview Topics:</p>

Section 5- Existing Partner/Experienced Partner Supplement The applicant organization has a successful track record and, if applicable, a sound ESP management plan	☐ Meets ☐ Partially Meets ☐ Does Not Meet N/A	Summary Comments/Capacity Interview Topics: N/A		
Section 2: Academic Plan				
A. The response in this section is complete and cohesive		Meets ☒	Partially Meets ☐ Does Not Meet ☐	
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
1. Applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
2. Applicant included attachments 1 (if applicable), 2, and 3	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
3. The overall academic plan is coherent and aligned with the stated mission and vision	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
4. The overall academic plan is aligned to and likely to meet the needs identified by the district for this campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
B. The applicant presented a clear plan to implement high-quality curriculum and effective instruction, and there is compelling justification and rationale for the curriculum and instruction plan		Meets ☒	Partially Meets ☐ Does Not Meet ☐	
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation

5. The applicant has selected a curriculum that is aligned to Texas standards	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
6. The applicant has developed or has a viable plan to develop a scope and sequence for each grade level and/or content area to be used at the school(s)	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Add a paragraph about leveraging HISD's, HCC's, and College Board's curriculum and note with a reference to them and a link to the courses and if you have any adjustments that you will make this. Include 9 th and 10 th grade to the scope and sequence for CTE on page 24.	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Shared and spelled out the Scope and Sequence and adding to the application
7. There is a plan for selecting and implementing High Quality Instructional Materials, and the applicant included what instructional materials will be used at the campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
8. There is a plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials	☐ Meets ☒ Partially Meets ☐ Does Not Meet	PD described, but cadence and accountability measures are limited. Add equity and access to the PD plan as referenced on page 21 and section E on page 23. No training listed for targeted literacy and math intervention. On page 22 use looking at data more frequently as mentioned throughout the application.	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Spoke to teacher training and effective use of College Board and HCC resources. Explained differentiated lesson design and its connection to serving the campuses special populations. Look at adjustments to Dual Credit support within the calendar and moving it forward based on data. Addressed the data review and frequency of assessments. Include the magnet plan and school choice link use the graduation plan as a framework
9. The applicant's framework for instructional design and strategies: <ul style="list-style-type: none"> reflects the needs of the school's target population 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> ensures all students meet or exceed the expectations of Texas state standards promotes critical-thinking skills 				
10. There is a plan to identify and serve students with learning gaps	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Led with resources and what will be done	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
11. There is an appropriate plan to maximize instructional time	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
12. The applicant provided peer-reviewed research that backs up the program OR evidence of their experience with this program that includes metrics that demonstrate it has been successful	☐ Meets ☒ Partially Meets ☐ Does Not Meet	List metrics of success. Provide links to those resources listed from Dept of ED, College Board, and GRH	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Identified and shared the body of research. Will add links and references to the research
13. There is an explanation of how this curriculum and instruction framework create a rigorous, engaging, and high-quality educational experience for students that could be reasonably replicated for the student population at the proposed campus(es)	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
14. There is a valid description of why this model is likely to be effective for the anticipated student population at the proposed campus(es) that is compelling	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

and aligned to the needs that the district has identified				
C. (High Schools Only) The applicant presented an appropriate plan that ensures students meet graduation standards		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
15. The applicant included an attachment with exit standards for graduating students. This attachment: <ul style="list-style-type: none"> Is aligned to state high school graduation standards Includes what students in the last grade served will know and be able to do Includes how the applicant will ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce) 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	Look to include the college readiness milestones with the graduation plan
16. The applicant described systems and procedures that the school will implement for students at risk of dropping out or not meeting exit standards that are likely to meet the needs of students at the proposed campus(es)	☐ Meets ☒ Partially Meets ☐ Does Not Meet	On page 26 list the college ready milestones	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
D. The applicant provided a plan and demonstrated capacity to serve students in special populations		Meets ☒	Partially Meets ☐	Does Not Meet ☐

Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
17. The applicant provided an explanation of evidence from which the projection of anticipated special populations was derived that is reasonable given the district's student population	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
18. The organization or applicant team has experience in fulfilling state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
19. The applicant provided rationale for their understanding of and ongoing capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
20. The applicant included a plan for providing services to students in special education. The plan demonstrates that the applicant will successfully:	☐ Meets ☒ Partially Meets ☐ Does Not Meet	On page 28 and 29 answers are similar. There is no specificity for SpEd and EBs	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Addressed SpEd accommodations and identification process to update pages 28 and 29 in the application. Identified the role(s) of the SpEd Dept Chair.

<ul style="list-style-type: none"> • appropriately identify students for special education services • serve students in the least-restrictive environment possible • provide appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities • provide the required and appropriate support services as outlined in students' Individualized Education Plans and 504 plans • ensure that students receiving special education services participate in standardized testing 				
<p>21. The applicant included a plan for providing services to emergent bilingual students. The plan demonstrates that the applicant will successfully:</p> <ul style="list-style-type: none"> • employ specific instructional programs, practices, and strategies to ensure academic success and equitable access to the general education curriculum and 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	<p>On page 28 and 29 answers are similar. There is no specificity for SpEd and EBs</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet	<p>Identified who leads the work and provides training to include the the monitoring and evaluation and assessments. All teachers are ESL certified. When identifying following HISD use "such as" and descriptors.</p>

core academic program for emergent bilingual students <ul style="list-style-type: none"> • monitor and evaluate student progress and success of emergent bilingual students and exit them from services as appropriate • include emergent bilingual students in standardized testing • include emergent bilingual students in school wide educational, extra-curricular, and culture-building activities 				
22. The applicant included a plan for providing services to students identified as intellectually gifted. The plan demonstrates that the applicant will successfully: <ul style="list-style-type: none"> • identify students • provide specific instructional programs, practices, and strategies aligned to the needs of these students 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
E. The applicant provided a sound plan for student recruitment and enrollment		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
23. The applicant provided a student recruitment and marketing plan that includes	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Speak to safeguards for kids who are not successful and if the reflection is	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Identified safeguards for ensuring student success as well as a marketing plan that includes “all” students from

safeguards for equal inclusion of all interested students and families, including: <ul style="list-style-type: none"> those in poverty students who have struggled academically students with disabilities, and other youth at risk of academic failure 		reverse provide the information of success.		various cultures, ethnicities, and economics.
24. The applicant attached an Enrollment Policy that complies with state law and includes a lottery policy if more students choose to enroll at the campus than can accommodated	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Add links to School Choice	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
25. The applicant's Enrollment Policy includes safeguards or policies that ensure that the school will be open to all eligible students	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
F. The applicant provided a compelling plan for creating a positive school culture		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
26. The applicant described a vision for the culture of the school(s) that is aligned to the needs the district identified in its Call for Quality Schools	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
27. The applicant's vision for the school:	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • promotes high expectations • will reasonably establish a positive and safe academic environment • will reasonably create shared ownership of intellectual and social development for all students, including those with special needs, ELs, and students at risk of academic failure 				
<p>28. The applicant included a plan for establishing the intended culture. This plan includes processes and procedures to:</p> <ul style="list-style-type: none"> • develop a common understanding of the intended school culture among staff and students • identify how the intended culture is put in practice and made evident in the daily life of the school • regularly assess and measure progress on student and staff experiences and course-correct when expected progress is not being made 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>29. The applicant included a plan for family engagement. This plan:</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> includes methods the applicant will use to create an inclusive and welcoming environment is likely to engage families in positive, constructive, and personalized ways 				
<p>30. The applicant included a plan for providing student support services (e.g., counseling, mentoring, external service referrals) that includes:</p> <ul style="list-style-type: none"> a program to proactively teach mental health and wellness skills to all students a process for staff to meet frequently to identify and monitor individual student needs a process to identify support service providers and to connect students with the support services (e.g., counseling, mentoring, external service referrals) that address their needs 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	<p>When does the proactively teaching occur to teach about mental health. What supports do you have for students with the highest mental health needs and are in crisis.</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet	<p>Identified the process, resources, and staff dealing with student supports prior to the student needing supports. Spoke about the use of their Advocacy period and staff. Identified the implementation of the AVID model and 1:1 counseling that occurs and how to address it with a fluent contact ability with students that is iterative throughout the year.</p>
<p>31. The applicant included the systems and processes the school will use for tracking discipline referrals and interventions, including how they will identify trends</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

and adapt activities accordingly				
32. The applicant attached the student discipline policy/code of conduct for the proposed campus(es). This policy or code includes: <ul style="list-style-type: none"> appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture legally sound policies for student discipline, suspension, and expulsion protection of students' rights to due process 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
G. The applicant provided an assessment and evaluation plan that demonstrates their ability to track student progress		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
33. The applicant included annual student performance goals that: <ul style="list-style-type: none"> include targets aligned with the state accountability system meet the needs/desired outcomes the district wants to achieve with this partnership 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

34. The applicant included a plan (including the meeting structures and frequency) to implement and interpret interim assessments that measure academic progress toward these annual goals throughout the school year	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
35. The applicant included a plan and system for collecting and analyzing student academic achievement data that includes: <ul style="list-style-type: none"> • methods to report data to the school community that ensure that stakeholders have equal access to the information • processes and procedures to use the data to refine and improve instruction that include: <ul style="list-style-type: none"> ○ dedicated, scheduled time to provide training and support to school leadership and teachers in the use of data to improve instruction ○ qualified personnel to provide this training and support for school leaders and teachers 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
36. The applicant included corrective actions that they	☐ Meets	Keep your attendance percentages for your students at 93% or 94% aligned in	☒ Meets	Explicit about the support(s) students receive. Reviewed and talked through

<p>will take if they fall short of the academic goals stated in this section.</p> <p>There is a plan to take corrective action for both annual and interim goals that includes:</p> <ul style="list-style-type: none"> a clear explanation of what would trigger such actions who would implement the corrective actions 	☒ Partially Meets ☐ Does Not Meet	<p>the application. Add layers for response for the Tiering and support for student. It goes from Tier 1 to Tier 2 right away. Add steps in Tier 1 that have small group, individual student, parent on page 40 and 41.</p>	☐ Partially Meets ☐ Does Not Meet	<p>the Tiers of support for both student and teachers and evaluated the escalation process established.</p>
Section 3: Governance, Operating Plan, and Capacity				
H. The response in this section is complete and cohesive		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
37. The applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
38. The applicant included attachments 4-9	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>39. The overall governance structure and operations plan is:</p> <ul style="list-style-type: none"> coherent aligned with the stated mission and vision aligned with the academic plan (section 2) aligned with the finance plan (section 4) 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
40. The overall governance plan is aligned to and likely to	☒ Meets		☒ Meets	

meet the needs identified by the district for this campus	☐ Partially Meets ☐ Does Not Meet		☐ Partially Meets ☐ Does Not Meet	
I. The applicant organization is an eligible entity and includes sufficient staff to manage the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
41. The attached organizational chart indicates that the organization has already employed staff that will be engaged in daily, on-site school management routines	☐ Meets ☒ Partially Meets ☐ Does Not Meet	In the Org Chart Sara Yockey is not listed consistently... pg 18 is her original listing check pg 73 and 74 and if included add her resume	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Reviewed roles and responsibilities and addressed Sara Yockey
42. The daily responsibilities described in the chart include daily on-site school management routines that match the needs of the campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
43. The organization is one of the following eligible entities: <ul style="list-style-type: none"> • open-enrollment charter school • an institution of higher education as defined under Section 61.003 of the Texas Education Code (TEC),] • a private or independent institution of higher education as defined under TEC Section 61.003, or • an organization that is exempt from taxation under Section 501(c)(3) 	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	

of the Internal Revenue Code				
J. The applicant organization's board is independent of the district, meets legal requirements, and includes qualified members		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
44. The partner organization board is made up of at least three members	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
45. The partner organization board does not include any members of the district's board, the district superintendent, OR any members that are district employees involved in the selection or oversight of the district charter partnership	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
46. The bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances provided by the potential partner assure the current and ongoing independence of the partner board from the district board	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Provide certifications as an example of evidence	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Addressed trainings and expectations
47. The board member information sheets and resumes for each proposed board member demonstrate that, collectively, the board	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Is Sara Yockey included or not	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Updating the Org Chart and Table consisting of leadership

members have demonstrated experience and success in: <ul style="list-style-type: none"> the implementation and oversight of education programs financial oversight of schools and/or non-profit organizations implementing legal requirements for schools and/or non-profit organizations community engagement 				
48. The applicant included a plan to grow and/or sustain board membership, including: <ul style="list-style-type: none"> a description of the education, finance, law, and community engagement and other qualifications that current or future board members must possess a plan to recruit board members with the necessary experiences in education, finance, law, and community engagement described in the preceding bullet point proposed training requirements and an orientation plan for new board members proposed ongoing training requirements for 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Tighten the evaluation metrics on how the Board will evaluate the leader and school. You can use the performance contract as an example with the achievement gap and accountability rating.	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Addressed the performance contract and updates to add to the metrics two being maintaining an A-rating and closing the Achievement Gap.

board members that will ensure their continued ability to govern charter campuses within the district				
49. The applicant described how the board will evaluate the success of the school(s) and school leader(s), including: <ul style="list-style-type: none"> the criteria by which the board will evaluate the school(s) and leader(s) meetings that occur frequently enough for the board to have an understanding of the school and leader's performance the roles and responsibilities of any standing committees 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Think through the commitment of trainings and ongoing committees based on the number of Board members.	☒ Meets ☐ Partially Meets ☐ Does Not Meet	
K. The applicant team has the necessary experience and capacity to manage the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
50. The applicant team is comprised of members with experience and measurable success in school leadership, administration, and governance	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
51. The applicant team is comprised of members with experience and measurable success in implementing	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Check off attachment box	☒ Meets ☐ Partially Meets ☐ Does Not Meet	

systems for curriculum, instruction, and assessment				
52. The applicant team is comprised of members with experience and measurable success in performance management	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
53. The applicant team is composed of members with experience and measurable success in parent and community engagement	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
54. The proposed school leader has experience in and demonstrated ability to design, launch, and lead a school and implement the specific educational program being proposed OR the board has a plan (with appropriate timeline) to recruit and retain a leader with the ability to implement the specific educational program being proposed	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
55. The applicant provided measurable performance expectations for the school leader that are: <ul style="list-style-type: none"> aligned to the mission of the school aligned to a trajectory of improved student outcomes for the specific campus or campuses to be operated by the organization 	☐ Meets ☒ Partially Meets ☐ Does Not Meet	Add the progression benchmarks along the way BOY, MOY, and EOY for the leader's performance	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Identified the specific metrics to be evaluated to student and teacher outcomes

<ul style="list-style-type: none"> appropriate for both the school launch in the first year of operation to sustainability of improved outcomes in future years 				
L. The applicant has a clear plan to recruit and retain quality staff at the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
56. The applicant's recruitment and hiring strategy includes: <ul style="list-style-type: none"> criteria and protocols for hiring for all campus roles predetermined selection criteria that demonstrate high standards selection criteria aligned to the mission and academic program the school will offer a hiring protocol and timeline that ensure that the school is fully staffed by July 1 of each year 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
57. The applicant's staff development and retention plan includes: <ul style="list-style-type: none"> an induction program that is tailored to any unique or particularly challenging aspects of the educational program described in Section 2 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> the method the applicant will use to evaluate teacher performance and growth, including the evaluation tools and processes to be used the method, resources, and timeline that the applicant will use to support school staff personnel with demonstrated experience and qualifications to provide professional development and facilitate adult learning how the applicant will identify and retain high-performing staff 				
<p>58. The applicant described a process for remedying unsatisfactory leadership and/or teacher performance that includes:</p> <ul style="list-style-type: none"> how underperforming staff are identified the steps and documentation that the applicant will take and collect to remedy the performance if the school staff will remain district employees, how the applicant will work with the district to change the assignment of the staff 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

M. The applicant has a valid facilities plan		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
59. The application identifies an appropriate and viable proposed school facility, or the application includes a facilities plan. If the application includes a facilities plan, the plan includes: <ul style="list-style-type: none"> the timeline for identifying the facility how the facility will be financed how the applicant will renovate and/or ensure code compliance for a facility how the facilities plan will meet the requirements of the educational program and anticipated student population 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
Section 4: Financial Plan				
N. The response in this section is complete and cohesive		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
60. The applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
61. The applicant included attachment 10	☒ Meets		☒ Meets	

	☐ Partially Meets ☐ Does Not Meet		☐ Partially Meets ☐ Does Not Meet	
62. The overall financial plan is: <ul style="list-style-type: none"> coherent aligned with the stated mission and vision aligned with the academic plan (section 2) aligned with the governance and operations plan (section 3) 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
O. The applicant demonstrated that the organization has the capacity, processes, and personnel necessary to meet the financial needs of managing the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
63. The applicant's description of the organization's systems, policies, and processes for financial planning, accounting, purchasing, and payroll that are aligned with and will allow the school to meet financial accountability requirements	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
64. The applicant organization has (or has plans to hire) staff the with necessary qualifications to manage the organization's financial systems, policies, and processes	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
65. The application describes:	☒ Meets		☒ Meets	

<ul style="list-style-type: none"> the organization's internal controls that meet the standard outlined in the Financial Accountability System Resource Guide (Module 2: Special Supplement – Charter Schools) the applicant's knowledge of and ability to meet financial reporting requirements how the applicant will conduct independent annual financial and administrative audits that meet district requirements 	☐ Partially Meets ☐ Does Not Meet		☐ Partially Meets ☐ Does Not Meet	
66. The financial plan describes roles and responsibilities among the administration and governing board regarding school finance that align with the internal controls described in the preceding criteria	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
67. The financial plan includes the methods the applicant will employ to publicly adopt the school's budget and disseminate its annual audit and an annual report	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
68. The operating budget and narrative include reasonable: <ul style="list-style-type: none"> grant/fundraising assumptions, 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable), and projected cost to implement the academic model described in this application 				
69. The organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated includes: <ul style="list-style-type: none"> how the organization will identify the specific areas of financial weakness what corrective actions the organization will take to remedy specific areas of financial weakness and/or how a corrective action plan will be developed how the organization will ensure a contingency or corrective action plan is successfully implemented 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
Section 5: Existing Partner/Experienced Partner Supplement N/A				
P. The response in this section is complete and cohesive	Meets ☐		Partially Meets ☐	Does Not Meet ☐

Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
70. The applicant responded to all questions in this section	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
71. The applicant included supplemental attachments 1 and 2, and supplemental attachment 3 (if applicable)	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
72. The supplemental information demonstrates the organization has experience and success in implementing the model described in the rest of the application	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
Q. The applicant has demonstrated a successful academic and financial track record		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
73. The applicant provided evidence of measurable success in: <ul style="list-style-type: none"> • academic success • serving populations similar to the population the applicant intends to serve • successful management of non-academic school functions (e.g., back-office services, school operations, extracurricular programs) 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>74. The applicant's independent financial audit report and its most recent annual report of the experienced partner applicant or ESP/CMO:</p> <ul style="list-style-type: none"> • demonstrates the financial health of the organization • provides reasonable assurance that the organization will maintain this financial health when operating the proposed campus(es) in this district 	☐ Meets ☐ Partially Meets ☐ Does Not Meet		☐ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>75. The applicant does not have a history of charter revocations, non-renewals, withdrawals, or failures to open</p>	☐ Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Does Not Meet	
<p>76. If the applicant is partnering with an F rated campus, the applicant has:</p> <ul style="list-style-type: none"> • Been in existence for at least three years prior to undertaking the management of the district campus • Managed multiple campuses for multiple years • Has a track record of managing campuses to academic success or has significantly improved the academic 		N/A		

performance of the campuses				
R. If applicable, the applicant provided a clear Education Service Provider (ESP) or Charter Management Organization (CMO) plan		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
77. The management agreement between the ESP or CMO and the applicant organization includes: <ul style="list-style-type: none"> a detailed description of the roles and responsibilities of the ESP or CMO a detailed explanation of the scope of services and costs of all resources to be provided by the ESP or CMO a detailed description of the oversight and evaluation methods that the board will use to oversee the ESP or CMO, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP's or CMO's progress toward 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>achieving agreed-upon goals</p> <ul style="list-style-type: none"> • a detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory • a detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP or CMO and the schedule on which the ESP or CMO will receive compensation • a detailed explanation of the financial responsibilities of the ESP or CMO, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP or CMO can make without obtaining board approval, and what reports the ESP or CMO will submit to the board 				
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<p>on financial performance and on what schedule</p> <ul style="list-style-type: none"> • a detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP or CMO and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed • a detailed description of the grounds for which the ESP/CMO or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause • an explanation and justification of any indemnification provisions in the event of default or breach by either party 				
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78. The applicant included a plan for the operation of the school in the case that the management agreement is terminated that includes how this plan would be enforced and carried out	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
79. The applicant included: <ul style="list-style-type: none"> assurance that the board is independent from the ESP or CMO and self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed ESP or any affiliated business entities evidence of the board's independence 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
80. The applicant included a clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP/CMO supervisory responsibilities	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

81. The applicant included a detailed explanation and compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
82. The applicant included a detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused by the school	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

Section 2: Academic Plan

A. The response in this section is complete and cohesive

1. Applicant responded to all questions in this section
2. Applicant included attachments 1 (if applicable), 2, and 3
3. The overall academic plan is coherent and aligned with the stated mission and vision
4. The overall academic plan is aligned to and likely to meet the needs identified by the district for this campus

B. The applicant presented a clear plan to implement high-quality curriculum and effective instruction, and there is compelling justification and rationale for the curriculum and instruction plan

5. The applicant has selected a curriculum that is aligned to Texas standards
6. The applicant has developed or has a viable plan to develop a scope and sequence for each grade level and/or content area to be used at the school(s)
7. There is a plan for selecting and implementing High Quality Instructional Materials, and the applicant included what instructional materials will be used at the campus
8. There is a plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials
9. The applicant's framework for instructional design and strategies:
 - reflects the needs of the school's target population
 - ensures all students meet or exceed the expectations of Texas state standards
 - promotes critical-thinking skills
10. There is a plan to identify and serve students with learning gaps
11. There is an appropriate plan to maximize instructional time
12. The applicant provided peer-reviewed research that backs up the program OR evidence of their experience with this program that includes metrics that demonstrate it has been successful
13. There is an explanation of how this curriculum and instruction framework create a rigorous, engaging, and high-quality educational experience for students that could be reasonably replicated for the student population at the proposed campus(es)
14. There is a valid description of why this model is likely to be effective for the anticipated student population at the proposed campus(es) that is compelling and aligned to the needs that the district has identified

C. (High Schools Only) The applicant presented an appropriate plan that ensures students meet graduation standards

15. The applicant included an attachment with exit standards for graduating students. This attachment:
 - Is aligned to [state high school graduation standards](#)
 - Includes what students in the last grade served will know and be able to do
 - Includes how the applicant will ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce)

16. The applicant described systems and procedures that the school will implement for students at risk of dropping out or not meeting exit standards that are likely to meet the needs of students at the proposed campus(es)

D. The applicant provided a plan and demonstrated capacity to serve students in special populations

17. The applicant provided an explanation of evidence from which the projection of anticipated special populations was derived that is reasonable given the district's student population
18. The organization or applicant team has experience in fulfilling state and federal obligations and requirements pertaining to students with disabilities, ELs, and students identified as intellectually gifted
19. The applicant provided rationale for their understanding of and ongoing capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, ELs, and students identified as intellectually gifted
20. The applicant included a plan for providing services to students in special education. The plan demonstrates that the applicant will successfully:
- appropriately identify students for special education services
 - serve students in the least-restrictive environment possible
 - provide appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities
 - provide the required and appropriate support services as outlined in students' Individualized Education Plans and 504 plans
 - ensure that students receiving special education services participate in standardized testing
21. The applicant included a plan for providing services to English Learners (ELs). The plan demonstrates that the applicant will successfully:
- employ specific instructional programs, practices, and strategies to ensure academic success and equitable access to the general education curriculum and core academic program for ELs
 - monitor and evaluate student progress and success of ELs and exit them from services as appropriate
 - include ELs in standardized testing
 - include ELs in school wide educational, extra-curricular, and culture-building activities
22. The applicant included a plan for providing services to students identified as intellectually gifted. The plan demonstrates that the applicant will successfully:
- identify students
 - provide specific instructional programs, practices, and strategies aligned to the needs of these students

E. The applicant provided a sound plan for student recruitment and enrollment

23. The applicant provided a student recruitment and marketing plan that includes safeguards for equal inclusion of all interested students and families, including:
- those in poverty
 - students who have struggled academically
 - students with disabilities, and
 - other youth at risk of academic failure
24. The applicant attached an Enrollment Policy that complies with [state law](#) and includes a lottery policy if more students choose to enroll at the campus than can accommodated
25. The applicant's Enrollment Policy includes safeguards or policies that ensure that the school will be open to all eligible students

F. The applicant provided a compelling plan for creating a positive school culture

26. The applicant described a vision for the culture of the school(s) that is aligned to the needs the district identified in its Call for Quality Schools
27. The applicant's vision for the school:
- promotes high expectations
 - will reasonably establish a positive and safe academic environment
 - will reasonably create shared ownership of intellectual and social development for all students, including those with special needs, ELs, and students at risk of academic failure
28. The applicant included a plan for establishing the intended culture. This plan includes processes and procedures to:
- develop a common understanding of the intended school culture among staff and students
 - identify how the intended culture is put in practice and made evident in the daily life of the school
 - regularly assess and measure progress on student and staff experiences and course-correct when expected progress is not being made
29. The applicant included a plan for family engagement. This plan:
- includes methods the applicant will use to create an inclusive and welcoming environment
 - is likely to engage families in positive, constructive, and personalized ways
30. The applicant included a plan for providing student support services (e.g., counseling, mentoring, external service referrals) that includes:
- a program to proactively teach mental health and wellness skills to all students
 - a process for staff to meet frequently to identify and monitor individual student needs
 - a process to identify support service providers and to connect students with the support services (e.g., counseling, mentoring, external service referrals) that address their needs
31. The applicant included the systems and processes the school will use for tracking discipline referrals and interventions, including how they will identify trends and adapt activities accordingly
32. The applicant attached the student discipline policy/code of conduct for the proposed campus(es). This policy or code includes:
- appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture
 - legally sound policies for student discipline, suspension, and expulsion
 - protection of students' rights to due process

G. The applicant provided an assessment and evaluation plan that demonstrates their ability to track student progress

33. The applicant included annual student performance goals that:
- include targets aligned with the state accountability system
 - meet the needs/desired outcomes the district wants to achieve with this partnership
34. The applicant included a plan (including the meeting structures and frequency) to implement and interpret interim assessments that measure academic progress toward these annual goals throughout the school year
35. The applicant included a plan and system for collecting and analyzing student academic achievement data that includes:
- methods to report data to the school community that ensure that stakeholders have equal access to the information

- processes and procedures to use the data to refine and improve instruction that include:
 - dedicated, scheduled time to provide training and support to school leadership and teachers in the use of data to improve instruction
 - qualified personnel to provide this training and support for school leaders and teachers
36. The applicant included corrective actions that they will take if they fall short of the academic goals stated in this section.
- There is a plan to take corrective action for both annual and interim goals that includes:
- a clear explanation of what would trigger such actions
 - who would implement the corrective actions

Section 3: Governance, Operating Plan, and Capacity

H. The response in this section is complete and cohesive

37. The applicant responded to all questions in this section
38. The applicant included attachments 4-9
39. The overall governance structure and operations plan is:
- coherent
 - aligned with the stated mission and vision
 - aligned with the academic plan (section 2)
 - aligned with the finance plan (section 4)
40. The overall governance plan is aligned to and likely to meet the needs identified by the district for this campus

I. The applicant organization is an eligible entity and includes sufficient staff to manage the campus(es)

41. The attached organizational chart indicates that the organization has already employed staff that will be engaged in daily, on-site school management routines
42. The daily responsibilities described in the chart include daily, on-site school management routines that match the needs of the campus
43. The organization is one of the following:
- open-enrollment charter school
 - an institution of higher education as defined under Section 61.003 of the Texas Education Code (TEC),]
 - a private or independent institution of higher education as defined under TEC Section 61.003, or
 - an organization that is exempt from taxation under Section 501(c)(3) of the Internal Revenue Code

J. The applicant organization's board is independent of the district, meets legal requirements, and includes qualified members

44. The partner organization board is made up of at least three members
45. The partner organization board does not include any members of the district's board, the district superintendent, OR any members that are district employees involved in the selection or oversight of the district charter partnership
46. The bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances provided by the potential partner assure the current and ongoing independence of the partner board from the district board

47. The board member information sheets and resumes for each proposed board member demonstrate that, collectively, the board members have demonstrated experience and success in:
- the implementation and oversight of education programs
 - financial oversight of schools and/or non-profit organizations
 - implementing legal requirements for schools and/or non-profit organizations
 - community engagement
48. The applicant included a plan to grow and/or sustain board membership, including:
- a description of the education, finance, law, and community engagement and other qualifications that current or future board members must possess
 - a plan to recruit board members with the necessary experiences in education, finance, law, and community engagement described in the preceding bullet point
 - proposed training requirements and an orientation plan for new board members
 - proposed ongoing training requirements for board members that will ensure their continued ability to govern charter campuses within the district
49. The applicant described how the board will evaluate the success of the school(s) and school leader(s), including:
- the criteria by which the board will evaluate the school(s) and leader(s)
 - meetings that occur frequently enough for the board to have an understanding of the school and leader's performance
 - the roles and responsibilities of any standing committees

K. The applicant team has the necessary experience and capacity to manage the campus(es)

50. The applicant team is comprised of members with experience and measurable success in school leadership, administration, and governance
51. The applicant team is comprised of members with experience and measurable success in implementing systems for curriculum, instruction, and assessment
52. The applicant team is comprised of members with experience and measurable success in performance management
53. The applicant team is composed of members with experience and measurable success in parent and community engagement
54. The proposed school leader has experience in and demonstrated ability to design, launch, and lead a school and implement the specific educational program being proposed OR the board has a plan (with appropriate timeline) to recruit and retain a leader with the ability to implement the specific educational program being proposed
55. The applicant provided measurable performance expectations for the school leader that are:
- aligned to the mission of the school
 - aligned to a trajectory of improved student outcomes for the specific campus or campuses to be operated by the organization
 - appropriate for both the school launch in the first year of operation to sustainability of improved outcomes in future years

L. The applicant has a clear plan to recruit and retain quality staff at the campus(es)

56. The applicant's recruitment and hiring strategy includes:
- criteria and protocols for hiring for all campus roles
 - predetermined selection criteria that demonstrate high standards

- selection criteria aligned to the mission and academic program the school will offer
 - a hiring protocol and timeline that ensure that the school is fully staffed by July 1 of each year
57. The applicant's staff development and retention plan includes:
- an induction program that is tailored to any unique or particularly challenging aspects of the educational program described in Section 2
 - the method the applicant will use to evaluate teacher performance and growth, including the evaluation tools and processes to be used
 - the method, resources, and timeline that the applicant will use to support school staff
 - personnel with demonstrated experience and qualifications to provide professional development and facilitate adult learning
 - how the applicant will identify and retain high-performing staff
58. The applicant described a process for remedying unsatisfactory leadership and/or teacher performance that includes:
- how underperforming staff are identified
 - the steps and documentation that the applicant will take and collect to remedy the performance
 - if the school staff will remain district employees, how the applicant will work with the district to change the assignment of the staff

M. The applicant has a valid facilities plan

59. The application identifies an appropriate and viable proposed school facility, or the application includes a facilities plan. If the application includes a facilities plan, the plan includes:
- the timeline for identifying the facility
 - how the facility will be financed
 - how the applicant will renovate and/or ensure code compliance for a facility
 - how the facilities plan will meet the requirements of the educational program and anticipated student population

Section 4: Financial Plan

N. The response in this section is complete and cohesive

60. The applicant responded to all questions in this section
61. The applicant included attachment 10
62. The overall financial plan is:
- coherent
 - aligned with the stated mission and vision
 - aligned with the academic plan (section 2)
 - aligned with the governance and operations plan (section 3)

O. The applicant demonstrated that the organization has the capacity, processes, and personnel necessary to meet the financial needs of managing the campus(es)

63. The applicant's description of the organization's systems, policies, and processes for financial planning, accounting, purchasing, and payroll that are aligned with and will allow the school to meet [financial accountability](#) requirements

64. The applicant organization has (or has plans to hire) staff the with necessary qualifications to manage the organization’s financial systems, policies, and processes
65. The application describes:
- the organization’s internal controls that meet the standard outlined in the Financial Accountability System Resource Guide ([Module 2: Special Supplement – Charter Schools](#))
 - the applicant’s knowledge of and ability to meet financial reporting requirements
 - how the applicant will conduct independent annual financial and administrative audits that meet district requirements
66. The financial plan describes roles and responsibilities among the administration and governing board regarding school finance that align with the internal controls described in the preceding criteria
67. The financial plan includes the methods that the applicant will employ to publicly adopt the school’s budget and disseminate its annual audit and an annual report
68. The operating budget and narrative include reasonable:
- grant/fundraising assumptions,
 - amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable), and
 - projected cost to implement the academic model described in this application
69. The organization’s contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated includes:
- how the organization will identify the specific areas of financial weakness
 - what corrective actions the organization will take to remedy specific areas of financial weakness and/or how a corrective action plan will be developed
 - how the organization will ensure that a contingency or corrective action plan is successfully implemented

Section 5: Existing Partner/Experienced Partner Supplement

P. The response in this section is complete and cohesive

70. The applicant responded to all questions in this section
71. The applicant included supplemental attachments 1 and 2, and supplemental attachment 3 (if applicable)
72. The supplemental information demonstrates that the organization has experience and success in implementing the model described in the rest of the application

Q. The applicant has demonstrated a successful academic and financial track record

73. The applicant provided evidence of measurable success in:
- academic success
 - serving populations similar to the population that the applicant intends to serve
 - successful management of non-academic school functions (e.g., back- office services, school operations, extracurricular programs)
74. The applicant’s independent financial audit report and its most recent annual report of the experienced partner applicant or ESP:

- demonstrates the financial health of the organization
 - provides reasonable assurance that the organization will maintain this financial health when operating the proposed campus(es) in this district
75. The applicant does not have a history of charter revocations, non-renewals, withdrawals, or failures to open
76. If the applicant is partnering with an F rated campus, the applicant has:
- Been in existence for at least three years prior to undertaking the management of the district campus
 - Managed multiple campuses for multiple years
 - Has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses
- R. If applicable, the applicant provided a clear Education Service Provider (ESP) or Charter Management Organization (CMO) plan**
77. The management agreement between the ESP/CMO and the applicant organization includes:
- a detailed description of the roles and responsibilities of the ESP/CMO
 - a detailed explanation of the scope of services and costs of all resources to be provided by the ESP/CMO
 - a detailed description of the oversight and evaluation methods that the board will use to oversee the ESP/CMO, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP/CMO's progress toward achieving agreed-upon goals
 - a detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory
 - a detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP/CMO and the schedule on which the ESP/CMO will receive compensation
 - a detailed explanation of the financial responsibilities of the ESP/CMO, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP/CMO can make without obtaining board approval, and what reports the ESP/CMO will submit to the board on financial performance and on what schedule
 - a detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP/CMO and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed
 - a detailed description of the grounds for which the ESP/CMO or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause
 - an explanation and justification of any indemnification provisions in the event of default or breach by either party
78. The applicant included a plan for the operation of the school in the case that the management agreement is terminated that includes how this plan would be enforced and carried out
79. The applicant included:
- assurance that the board is independent from the ESP/CMO and self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed ESP/CMO or any affiliated business entities
 - evidence of the board's independence
80. The applicant included a clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP/CMO supervisory responsibilities

81. The applicant included a detailed explanation and compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement
82. The applicant included a detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused by the school

Instructions for using the TEA Model Local Campus Partner Application

Districts may use this model campus application or create their own. Districts that create their own application must have it approved as part of the benefits application process.

- If a district chooses to adopt this model application, they should complete the fields **in red** with information relevant their application process and remove this instruction page. Districts are encouraged to add district branding to the application.
- **If this application is altered beyond the fields marked in red, the locally developed application MUST be submitted to TEA by the following due dates (emailed to TXP@tea.texas.gov) as part of the benefits approval process:**
 - No later than Friday, December 5, 2025 at 5 p.m. Central Time OR
 - No later than 5 working days prior to the release of the district's local campus application (whichever date is sooner).

Last updated May 1, 2024.

TEA will not amend model documents (other than for formatting or typos) between the time that the To the Administrator Addressed letter is released and the current year due date.

Revision history:

Date of Update	Revision Summary
May 1, 2023	<ul style="list-style-type: none">● Updated model instructions (this page)● Clarified ESP/CMO application requirement instruction (p. 4)● Included a question about High Quality Instructional Materials in the Curriculum Design section (p. 17)● Added question about lottery plans in Enrollment Policy description (p. 20)● Added a question about partner staff responsible for financial management (p.28)● Added CMOs to Section 5, including a requirement to name the CMO or ESP if applicable (p.30)● Minor formatting changes/typo corrections
April 7, 2021	<ul style="list-style-type: none">● Included phased-in rule requirement for organizations that apply to operate turnaround campuses in Section 5, question 14 (p. 28)● Corrected TEC references in the drop-down menus on page 3● Updated model instructions (this page)● Minor formatting changes/typo corrections
August 28, 2020	<ul style="list-style-type: none">● Original

Houston Independent School District

Local Campus Partner Application

Introduction

TEC Chapter 12 establishes charter schools to achieve the following purposes:

- Improve student learning
- Increase the choice of learning opportunities within the public-school system
- Create professional opportunities that will attract new teachers to the public-school system
- Establish a new form of accountability for public schools
- Encourage different and innovative learning methods

Charter Application Eligibility

[This section will be tailored to the district's needs that are identified in the Call for Quality Schools.]

The Board shall consider an application for a Campus charter or Program charter if the applicant:

- Meets the eligibility requirements for a Campus charter or Program charter set forth in TEC **Choose an item.**
- Follows the application process established by the District
- Provides evidence to the Board that the applicant will comply with the statutory and District requirements for a campus charter or program charter
- **[District adds additional eligibility requirements from board policy and/or Call document]**

The Board welcomes applications for a Campus charter or Program charter ("Subchapter C charter") pursuant to various paths as set forth in TEC Chapter 39, Subchapter C. The Board specifically invites and encourages applications pursuant to TEC **Choose an item.**

Regardless of authorization path, all groups and entities seeking to create a Subchapter C charter shall follow the Charter Application and Review Process set forth in this document.

Charter Application Process Overview

The application process shall include: *[District will add processes as needed to align with board policy.]*

1. A comprehensive written application submitted by each applicant in accordance with application guidance and requirements provided by the Board
2. A rigorous review of the written application conducted by a review committee ("Review Committee") of at least three members, including at least one district staff member and one external evaluator, with relevant and diverse expertise
3. A formal recommendation from the Review Committee to the Superintendent for approval or denial of each application, based on evidence from the Review Committee's evaluation of the application
4. A formal recommendation from the Superintendent to the Board for approval or denial of each application, based on evidence from the Review Committee's evaluation of the application
5. A formal vote by the Board to approve or deny each application

Standard of Review. The Review Committee shall conduct a rigorous, evidence-based, and merit-focused evaluation of applications, including evaluating the proposed partner’s capacity to meet the Board’s established academic, financial, operational, and governance standards for charter schools. The Board shall grant a charter only in cases in which the Board determines that the proposed school is likely to:

1. Succeed in meeting academic, financial, operational, and governance standards, thereby meeting both performance and legal compliance expectations for campus charters in the District
2. Serve the best interests of the targeted students and community
3. Fulfill the purposes and intent of Texas’s charter school law

4. *[District adds any other non-negotiables here]*

2025 Request for Applications Timeline

Milestones
Application
Deadline for Complete Proposals — January 20, 2026 All proposals must be submitted in complete and final form by this date. Incomplete proposals, including those that are only partially uploaded, will be disqualified from this cycle.
Independent Evaluation Team Review
Review Committee Proposal Review — January 21, 2026 The Review Committee will review each proposal.
Required Capacity Interviews — January 26-30, 2026 Capacity interviews are conducted at the discretion of the District. They are not open to the public.
Formal Recommendation from Superintendent to Board — February 2, 2026
Board Vote — February 2, 2026

Applicant Types

Applicant types include: Non-profits, Institutes of Higher Education, Existing Charter Operators, and Governmental Entities

In this application cycle, two types of applicants will be considered, each with specific requirements.

Existing Partners – Partners that have operated at least one campus prior to submitting this application

New Partners – Partners that have not previously operated campuses

All applicants must complete Sections 1 – 4 of the application.

Existing Partners and any applicant proposing to contract with an entity that has previously operated schools (including any organizations that operate with an Education Service Provider (ESP) or Charter Management Organization (CMO) must also complete the Existing/Experienced Partner Section (Section 5) and all related attachments.

Instructions

The Board is pleased to invite proposals for new quality partners seeking to open a partnership school in current or subsequent school years. Prior to developing a proposal, please read this entire document

Components of the Proposal

- Narrative Proposal: The proposal is the formal application to the Board and is a comprehensive description of the school's educational, operational, and financial plans
- Attachments: Throughout the proposal, specific documents are requested in addition to narrative answers. Attachments may not contain additional narrative unless specified. A comprehensive list of the attachments is provided in these instructions
- Capacity Interview(s): Applicants may have the opportunity to present their plan and demonstrate the team's capacity to open and maintain a high-quality charter school, as well as to answer specific questions about their proposal

Specifications

- Applicants **must** submit proposals electronically and use this application.
- Only responses placed within the text boxes provided will be considered in evaluation activities. All elements of the proposal must be presented in 11-point font and single-spaced.
- Each major section of the proposal (School Overview, Educational Program, etc.) and each attachment must begin on a separate page. Application responses, including the existing questions and content, for sections 1-4 must not exceed XX pages. This does not include attachments.
- If you believe a particular question does not apply to your team or proposal, respond "Not Applicable" **and** state the reason this question is not applicable to your team or proposal.
- All required documents should be uploaded in the file format specified.
- Late or incorrectly formatted submissions will not be accepted.
- When submitting résumés, label each document with the individual's affiliation with the proposed school (e.g., board member, principal, etc.)
- Plagiarism, including the copying of language from any other charter application without proper attribution, is grounds for immediate denial of the proposal. It is not acceptable to copy and paste a discussion or description of an existing curriculum, instructional framework, or educational model (e.g., Montessori, arts integration, project-based learning, blended learning, etc.) from another source. A high-quality applicant team with the capacity to operate a high-quality school must be able to thoughtfully explain in their own words how they intend to educate children. Existing operators proposing to replicate a model may use their own intellectual property, which is appropriate and acceptable.

Attachments

The following is a list of attachments to accompany the proposal. Note that not all attachments will be applicable for all applicants. It is the responsibility of the applicant to ensure they submit all attachments required for their proposal. Do not upload documents for any attachment that is not applicable.

1. Graduation standards (*high school applicants only*)
2. Enrollment policy
3. Discipline policy
4. Organization charts
5. Board documents
6. Board Member Information Form
7. Leadership team qualifications or role description
8. Staff Recruitment and Hiring Plan
9. Staff Development Plan
10. Financial Plan

Applicant Code of Conduct

Members of the Board are obligated to make decisions in the best interests of children, free from personal or political influences. Similarly, charter school applicants have the responsibility of respecting and upholding the integrity of the charter school proposal process.

Specifically, charter school applicants shall not:

- Initiate, or attempt to initiate, any activity with a Trustee
- Initiate, or attempt to initiate, any activity with a member of the Evaluation Team
- Direct any communications, including proposal documents, to a Trustee or to a member of the Evaluation Team

Charter school applicants found to be in violation of these requirements may be deemed ineligible for consideration in future proposal processes.

Public Disclosure

All charter school proposal materials submitted to the Board become public records.

Friends of the Houston Academy for International Studies

Request for Applications for Subchapter C Charters

Applicant Information

Name of Applicant Organization	Friends of the Houston Academy for International Studies
Primary Contact Person	Melissa Jacobs
Mailing Address	1810 Stuart Street, Houston, TX 77004
Phone Number	713-562-2683
Email	Mjacobs1@houstonisd.org

Names, current jobs and employers, and proposed roles of all persons on applicant team (*Add lines as needed*)

Full Name	Current Job Title and Employer	Position with Proposed School
Melissa Jacobs-Thibaut	Principal, HAIS	Executive Director, Friends of HAIS

We plan to apply as a(n):

☒ New Operator (have not previously managed campuses):
complete sections 1-4

☐ Existing Partner (have previously managed campuses and/or have an ESP or CMO): complete sections 1-5

Does this organization operate any other campuses in the United States?

☐ Yes

☒ No

If Yes, complete the table below (*Add lines as needed*) and complete section 5

State	Authorizer	School Name	Year Operation Began	Most Recent School Rating
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Does this applicant team have charter school applications under consideration by any other authorizer(s) in the United States?

☐ Yes

☒ No

If Yes, complete the table below (*Add lines as needed*)

State	Authorizer	Proposed School Name	Application Due Date	Decision Date
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Does this applicant team have new schools or campuses scheduled to open in the United States in the next five years?

☐ Yes

☒ No

If Yes, complete the table below (*Add lines as needed*)

Planned School Name	City	State	Opening Date
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Was this application completed by the operating partner and without assistance from the district or a district assigned vendor?

☒ Yes

☐ No

School Information

**NOTE: Complete this part for each school / campus included in this proposal.
Duplicate as needed.**

Proposed School / Campus Name	Opening Year	Grades: Year 1	Grades: At Capacity
The Houston Academy for International Studies	2026	9-12	9-12
Proposed Location			
School District	Houston Independent School District		
Address of Identified Facility <i>If applicable.</i>	1810 Stuart Street, Houston TX 77004		
Projected Student Enrollment Number			455
Projected Demographic Information	% EcoDis: 62.21%	% SpEd: 4.25	% EL: 17.6
Model / Specialty <i>(Check all that apply)</i>			
☐ Alternative	☐ Career / Technical Ed.	☐ Military	☐ Montessori
☐ Arts	☒ College Prep	☐ Language Immersion	☐ STEM
☐ Blended Learning	☐ Other <i>(list)</i> :	☐ Disability <i>(list)</i> :	

Name of Proposed Principal	Melissa Jacobs
Current Employment	Houston ISD
Phone Number – Day	713-942-1430
Phone Number – Evening	██████████
Email	mjacobs1@houstonisd.org

Section 1 - School Overview

This section is not rated separately by the evaluators. It provides the evaluators with a reference for each of the other sections of the proposal, which will be assessed, in part, for the quality of alignment with the School Overview. Please reference page limit requirements on page 5 (Specifications).

Executive Summary

(Limit: 4 Pages)

The Executive Summary should provide a concise overview of the proposed plan for the school; the outcomes you expect to achieve; the geographic and population considerations of the school environment; the challenges particular to those considerations; and the applicant team's capacity to successfully open and operate a high-quality school given the above considerations.

1. **Mission and Vision.** State the mission and vision of the proposed school. The mission is a statement of the fundamental purpose of the school, describing why it exists. The vision statement describes how the school will operate and what success looks like for students. The mission and vision statement provide the foundation for the entire proposal, and taken together, should identify the students and community to be served and illustrate what success for students will look like.

Through international studies, a personalized environment, and college preparatory curriculum, the Houston Academy for International Studies will prepare students for active roles as global citizens.

Mission: The Houston Academy for International Studies exists to serve Houston's historically underserved and at-risk students by providing a rigorous early college high school experience that expands access to college, career pathways, and global opportunities. Through high academic expectations, college-aligned instruction, and strong community and higher education partnerships, the school equips students with the knowledge, skills, and confidence needed to graduate prepared for postsecondary success and meaningful participation in society.

Vision: Houston Academy for International Studies envisions a learning community that intentionally serves Houston students who have been traditionally underrepresented in higher education, including first-generation college-bound students and those facing academic, economic, or social barriers. The school operates as an early college model that integrates TEKS-aligned instruction, College Board curriculum, and Houston Community College coursework aligned to high school graduation requirements. Student success is defined by strong academic achievement, completion of college credit while in high school, persistence toward graduation, and readiness for college, careers, and civic engagement. Graduates leave HAIS empowered with critical thinking skills, global awareness, and a clear postsecondary pathway to improve their lives and contribute positively to the Houston community and beyond.

2. **Educational Need and Anticipated Student Population.** Describe the anticipated student population, students' anticipated educational needs, and non-academic challenges the school is likely to encounter. Describe the rationale for selecting the location and targeting this student population.

Houston Academy for International Studies (HAIS) is designed to meet an urgent need in Houston. Too many students, especially those who are economically disadvantaged and otherwise at-risk, graduate

from high school without a pathway to a living-wage career, postsecondary credential attainment, or the knowledge and skills needed to participate fully in civic life and an interconnected world. Recent Houston area outcomes underscore this challenge. A Good Reason Houston analysis of local graduates found that fewer than 20% of HISD graduates from the class of 2017 were earning a living wage six years after graduation, and that postsecondary credentials (including associate degrees) substantially increase the likelihood of reaching living-wage earnings. [Good Reason Houston+1](#) In addition, MIT's Living Wage Calculator shows that the hourly wage needed to meet basic needs in the Houston area is substantially higher than what many entry-level jobs typically pay, reinforcing that a high school diploma alone is often insufficient for economic stability. [Living Wage Calculator+1](#) This underscores the urgent need for early, intentional access to college coursework and credential attainment while students are still in high school.

HAIS primarily serves students who are economically disadvantaged, first-generation college-bound, and identified as at-risk due to academic gaps, limited access to advanced coursework, high mobility, or significant non-academic barriers. Many students require accelerated academic supports alongside rigorous instruction to remain engaged and on track for graduation. Anticipated non-academic challenges include inconsistent attendance linked to transportation or family responsibilities, mental health and wellness needs, limited exposure to postsecondary systems, and reduced access to enrichment opportunities that build social capital.

In addition to academic and economic needs, students from underserved communities often have limited access to experiential learning opportunities, including local, national, and international travel, that are critical to developing global awareness, cultural competence, confidence, and real-world context for their studies. These experiences are especially important for students who may not otherwise have opportunities to travel beyond their immediate neighborhoods. HAIS addresses this need by intentionally incorporating experiential learning, field-based studies, and travel opportunities connected to coursework in international studies, history, language, and civic engagement. Such experiences help students make meaningful connections between academic content and the broader world, strengthening critical thinking, adaptability, and leadership skills.

HAIS is intentionally located in Midtown Houston to serve communities where economic opportunity, college attainment, and access to enrichment have been historically unequal. Through strong partnerships with Houston Community College, the school provides students with aligned dual-credit coursework that counts toward high school graduation and an associate degree. This early college model combined with experiential learning and global exposure, ensures that students graduate not only with academic credentials, but also with the knowledge, skills, and perspective necessary to participate fully in their communities, their democracy, and an interconnected world.

3. **Education Plan / Academic Model. Provide an overview of the education program of the proposed school, including major instructional methods, assessment strategies, and non-negotiables of the school model. Describe the evidence that demonstrates the school model will be successful in improving academic achievement for the targeted student population.**

Houston Academy for International Studies (HAIS) implements a rigorous, coherent early college academic model designed to improve academic outcomes and long-term postsecondary success for Houston's historically underserved students. The program integrates TEKS-aligned instruction, College Board curriculum, Houston City College (HCC) dual-credit coursework, and career-aligned experiential learning, ensuring students graduate with both a high school diploma and significant progress toward, or completion of, an associate degree.

Major Instructional Methods

Instruction at HAIS is grounded in high expectations, strong academic discourse, and real-world application. Core instructional methods currently include:

- **College Board–aligned instruction (Pre-AP and AP frameworks)** that emphasizes analytical reading, evidence-based writing, problem solving, and critical thinking across content areas.
- **Standards-based instruction aligned to TEKS**, with a clearly defined scope and sequence in each subject to ensure coherence and vertical alignment.
- **Early college coursework through Houston City College**, intentionally aligned to high school graduation requirements and sequenced to support student success in college-level learning.
- **Project-Based Research (PBR)** embedded across content areas, with a formal research focus in **Grade 11**, where students engage in interdisciplinary projects tied to the UN Millennium Global Goals.
- **Career and Technical Education (CTE) pathways** that align academic content to high-demand career fields and reinforce real-world problem solving, technical skills, and professional competencies.
- **Work-based learning and internships in Grade 12**, providing students with structured, supervised real-world experiences connected to their CTE pathway and postsecondary goals.
- **Field-based learning experiences**, including local and international site visits, that connect classroom instruction to real-world contexts and deepen students' global awareness, civic understanding, and career exploration.

This instructional approach ensures students experience both academic rigor and relevance, strengthening engagement and persistence for students who may have previously struggled in traditional settings.

Assessment Strategies

HAIS currently employs a comprehensive assessment system to monitor progress, identify learning gaps, and continuously improve instruction:

- **Formative assessments** embedded within College Board instructional materials to guide daily instruction and provide timely feedback.
- **Common assessments and performance tasks**, including research projects and presentations, aligned to TEKS and college expectations.
- **Interim assessments** to track progress toward state accountability measures and college readiness benchmarks.
- **Dual-credit assessments** administered through HCC to validate college-level mastery.

- **Data-driven PLCs and instructional coaching cycles** to analyze student work, adjust instruction, and implement targeted interventions.

This system ensures instructional decisions are grounded in evidence and responsive to student needs.

Non-Negotiables of the HAIS School Model

The HAIS educational program is anchored by the following non-negotiables:

1. **Early College Access for All Students** – All students are provided the opportunity and support to earn college credit aligned to graduation requirements.
2. **High-Quality Instructional Materials** – Instruction is grounded in College Board and HCC materials aligned to TEKS and college standards.
3. **Academic Rigor with Strong Supports** – High expectations paired with structured academic, social, and advisory supports.
4. **Real-World Learning** – Project-based research, field experiences, CTE pathways, and internships are essential components of the student experience.
5. **Equity and Access** – Systems are designed to remove barriers for first-generation college students and those facing academic or economic challenges.
6. **College, Career, and Global Readiness** – Students graduate prepared to succeed academically, professionally, and civically.

Evidence of Effectiveness

The HAIS model has demonstrated sustained success with the targeted student population. The school has earned Texas Education Agency A ratings and National Blue Ribbon School recognition, reflecting high academic performance and strong instructional practices. HAIS consistently posts exceptionally high college-going rates and has achieved notable success in associate degree attainment while students are still in high school, outcomes that far exceed typical expectations for similar student populations.

These results provide strong evidence that the HAIS model—combining high-quality curriculum, early college access, CTE-aligned experiential learning, and intentional student supports—is effective in improving academic achievement, increasing postsecondary credential attainment, and expanding economic and civic opportunities for Houston’s underserved students.

4. **Leadership and Governance.** List the current members of the school’s proposed leadership team and governing board, including their roles with the school and their current professional affiliations.

Add lines to the following table, as needed. Do not list members of the applicant team who will not have an official leadership role with the school going forward, such as consultants.

Full Name	Current Job Title and Employer	Position with Proposed School
Melissa Jacobs-Thibaut	Principal, Houston ISD	Executive Director, Friends of HAIS
Charles Kaspari	Assistant Principal, HISD	Assistant Principal, HISD
Adelisse Gomez	Assistant Principal, HISD	Assistant Principal, HISD
Sarah Yockey	Teacher Specialist	Assistant Principal, HISD
Jennifer Kapral	Executive Director, Preservation Houston	Board Member, Friends of HAIS
Brian Gaston	Executive Director, Smiley Institute	Board Member, Friends of HAIS
Brenda Rangel	Assistant Dean, Rice Center for Education, Susanne M. Glasscock School of Continuing Studies	Board Member, Friends of HAIS

Enrollment Summary

(Limit: 2 Pages)

1. Complete the table below, illustrating the growth plan for the school. Indicate the school year (e.g., for Year 1, change 20xx to 2024) for each column.

Note: Remove any rows for grades the school will not serve.

Grade Level	Number of Students					
	Year 1 2026	Year 2 2027	Year 3 2028	Year 4 2029	Year 5 2030	At Capacity 2031
9	130	130	135	135	135	135
10	115	120	120	125	125	125
11	110	115	115	115	120	120
12	105	105	110	110	110	115
TOTAL	460	465	470	475	480	485

2. Briefly describe the rationale for the number of students and grade levels served in Year 1 and the basis for the growth plan as outlined in the table.

In Year 1, the Houston Academy for International Studies will serve grades 9–12 with an enrollment of 460 students. This number reflects our average enrollment over the last 5 years. This size allows our school to remain with a focused, manageable high school model that prioritizes strong systems, staffing stability, and high-quality instruction. Enrollment by grade is intentionally balanced to support appropriate class sizes, personalized student supports, and effective use of facilities and staffing during the startup year.

The growth plan reflects modest, strategic increases of approximately 5 students per year, reaching 485 students at capacity. This gradual growth is based on projected demand, retention across grade levels, and the school's ability to scale supports, staffing, and resources without compromising instructional quality or school culture. The approach prioritizes sustainability, fiscal responsibility, and continuous improvement as cohorts progress through grades 9–12.

Section 2 – Educational Program

A strong Educational Program is coherent and aligned with the school's mission and vision, Operations Plan, and Financial Plan.

Curriculum and Instructional Design

1. Provide the following:

- a. **A curriculum aligned to state standards that includes a scope and sequence for each grade level and/or content area to be used at the school(s):**

The Houston Academy for International Studies (HAIS) implements a rigorous, standards-aligned curriculum grounded in the Texas Essential Knowledge and Skills (TEKS) and designed to ensure all students meet or exceed state academic expectations. The core instructional program is anchored in **College Board Pre-AP and AP curriculum frameworks**, which provide vertically aligned, research-based scope and sequence guidance that builds academic literacy, disciplinary thinking, and college readiness across all content areas (College Board Pre-AP: <https://preap.collegeboard.org> ; AP Course Frameworks: <https://apcentral.collegeboard.org>).

For grades 9–12, HAIS has a clearly defined scope and sequence for each required high school course in English language arts, mathematics, science, and social studies, aligned to HISD curriculum documents and TEKS pacing expectations (HISD Curriculum Central: <https://www.houstonisd.org/curriculum>). These scope-and-sequence documents map standards across the instructional year, ensuring intentional progression of knowledge and skills within and across grade levels. In grades 9 and 10, Pre-AP and AP (Geography and History) frameworks guide unit design, instructional strategies, and assessments while maintaining full alignment with TEKS and local graduation requirements. In grades 11 and 12, students engage in AP and advanced coursework aligned to College Board course descriptions and expectations.

HAIS also integrates dual-credit coursework through its formal partnership with Houston City College (HCC) to allow students to earn college credit that is fully aligned to Texas high school graduation requirements. Dual-credit courses are intentionally selected based on alignment to corresponding high school TEKS and course standards, and HCC syllabi provide clearly articulated learning outcomes, pacing, and assessments (HCC Course Catalog: <https://catalog.hccs.edu>). Ongoing collaboration between HAIS faculty and HCC partners ensures that college coursework reinforces and extends high school instruction rather than replacing it, supporting a coherent secondary-to-postsecondary instructional progression.

In response to workforce readiness and early college goals, HAIS has also developed a **CTE scope and sequence that begins in grades 9 and 10**, ensuring early exposure to career pathways. Ninth- and tenth-grade CTE coursework focuses on foundational skills such as research methods, digital literacy, collaboration, and career exploration, aligned to **HISD CTE frameworks** and industry-recognized pathways. These experiences are intentionally scaffolded to support **project-based research in grade 11** and **internships in grade 12**, providing students with authentic, real-world applications of their learning.

Together, this integrated approach—leveraging **HISD curriculum guidance, College Board frameworks, and HCC coursework**—ensures a coherent, vertically aligned scope and sequence across all grade levels and content areas. Where appropriate, HAIS makes local adjustments to pacing and instructional strategies to meet the needs of its early college student population, while maintaining full alignment to state standards and partner expectations. This alignment ensures consistency, rigor, and college readiness, while accelerating progress toward graduation, postsecondary credentials, and long-term academic success.

HAIS Scope and Sequence Overview (Grades 9–12)

Grade Level	Core Academic Focus	CTE & Experiential Learning	College Readiness & Credentials
Grade 9	<ul style="list-style-type: none"> TEKS-aligned core courses (PreAP ELA, PreAP Math, PreAP Science, AP Human Geography) College Board Pre-AP frameworks and AP Human Geography emphasizing academic literacy and inquiry 	<ul style="list-style-type: none"> CTE Foundations: including Principles of Government, career exploration, digital literacy, research skills, collaboration Introductory project-based learning 	<ul style="list-style-type: none"> HCC EDUC 1300: Study skills and college awareness Introduction to college systems and expectations
Grade 10	<ul style="list-style-type: none"> Advanced Pre-AP and AP World History coursework with increased rigor Vertical alignment toward AP and dual credit 	<ul style="list-style-type: none"> CTE Pathway Development: applied research, problem-solving, industry exploration Project-based research aligned to career pathways 	<ul style="list-style-type: none"> HCC Speech, Health and Arts PSAT/college readiness benchmarks and TSI preparation
Grade 11	<ul style="list-style-type: none"> AP, On-Ramps and/or dual-credit coursework aligned to TEKS and College Board frameworks 	<ul style="list-style-type: none"> CTE Application: project-based research connected to community or industry problems 	<ul style="list-style-type: none"> Substantial college credit accumulation TSI readiness and dual-credit success
Grade 12	<ul style="list-style-type: none"> Dual-credit coursework aligned to HCC degree pathways Advanced AP options as appropriate 	<ul style="list-style-type: none"> CTE Capstone: Practicum internships and real-world application experiences 	<ul style="list-style-type: none"> Associate degree completion or near-completion College enrollment and transition supports

b. A plan for selecting and implementing High Quality Instructional Materials, including what materials will be used at the campus(es):

Houston Academy for International Studies (HAIS) implements a deliberate, research-based process for selecting and implementing High-Quality Instructional Materials (HQIM) that are fully aligned to the Texas Essential Knowledge and Skills (TEKS) and support college readiness. The campus prioritizes instructional materials that demonstrate strong alignment to state standards, coherence across grade levels, evidence of effectiveness, and accessibility for diverse learners.

HAIS uses College Board instructional materials, including Pre-AP frameworks, course guides, unit plans, assessments, and instructional resources, as the foundation of its high school curriculum. These materials are selected because they are externally validated, vertically aligned, and designed to develop analytical reading, academic writing, problem-solving, and critical thinking skills across disciplines. College Board materials are reviewed annually by campus and district instructional leaders to ensure continued alignment to TEKS, relevance to student needs, and fidelity of implementation.

In addition, HAIS implements Houston City College (HCC) instructional materials for all approved dual-credit courses. These materials include HCC-adopted syllabi, textbooks, digital platforms, assessments, and course resources that meet college-level standards while aligning to corresponding Texas high school graduation requirements. HAIS collaborates with HCC faculty and administrators to ensure that dual-credit materials are aligned with high school course expectations, pacing, and student readiness supports.

c. A plan and calendar for providing ongoing professional development to all instructional staff at the campus related to the implementation of curriculum and instructional materials:

Houston Academy for International Studies (HAIS) implements a structured, ongoing professional development plan designed to ensure high-quality implementation of curriculum and instructional materials while advancing equity, access, and student achievement. Professional learning is intentionally embedded throughout the school year and aligned to the instructional priorities of an early college campus, ensuring that all students—including emergent bilingual students, students with disabilities, and first-generation college students—have equitable access to rigorous, college-aligned instruction.

Cadence and Structure

Professional development occurs on a weekly, monthly, and quarterly cycle to ensure sustained implementation, frequent data use, and continuous improvement.

- **Weekly Professional Learning Communities (PLCs):**
Teachers engage in structured collaboration focused on:
 - Lesson internalization using College Board Pre-AP/AP frameworks and HCC course materials
 - Frequent analysis of student work and formative assessment data
 - Ongoing review of MAP, STAAR interim, dual-credit performance, and classroom data
 - Immediate instructional adjustments and targeted interventions
 - **Monthly Campus-Wide Professional Development:**
Monthly sessions focus on high-impact instructional priorities, including:
 - Disciplinary literacy across content areas
 - Mathematics intervention and conceptual understanding
 - Differentiated lesson design to support emergent bilingual students, students with disabilities, and advanced learners
 - Effective use of College Board and Houston Community College instructional resources
 - Alignment to HAIS's graduation plan and early college model, ensuring students are prepared for AP, dual credit, and associate degree attainment
 - **Quarterly Vertical Alignment and Data Review Sessions:**
Teachers collaborate across grade levels and content areas to:
 - Ensure coherence of scope and sequence (grades 9–12)
 - Analyze student progress toward college readiness milestones
 - Adjust pacing and instructional supports, including dual-credit readiness and scaffolding based on student performance data
-

Equity, Access, and Targeted Intervention

Aligned to HAIS's commitment to equity and access (as outlined in Section E and earlier application sections), professional development explicitly prepares teachers to ensure all students can access rigorous, college-aligned instruction. Training includes:

- Sheltered instruction and academic language development for emergent bilingual students
- Implementation of IEP and 504 accommodations and Universal Design for Learning (UDL)
- Differentiation strategies that maintain rigor while increasing access
- Culturally responsive practices aligned to HAIS's diverse student population

Targeted Literacy and Math Intervention Training

Professional development includes explicit training in literacy and mathematics intervention, addressing a key area of need:

- Literacy across content areas (annotation, academic writing, discourse, vocabulary development)
- Reading comprehension and writing strategies aligned to College Board expectations
- Mathematics intervention strategies, including:
 - Small-group instruction
 - Diagnostic analysis of misconceptions
 - Progress monitoring and reteach cycles

These strategies are reinforced weekly in PLCs and monitored through student data to ensure impact.

Data-Driven Professional Learning and Frequent Monitoring

HAIS uses frequent and ongoing data review as a central driver of professional development and instructional improvement.

Teachers and instructional leaders regularly analyze:

- MAP (BOY/MOY/EOY) growth data
- STAAR interim and End-of-Course performance
- Dual-credit and AP course outcomes
- Formative classroom assessments

Data is reviewed:

- Weekly in PLCs
- Monthly in leadership and PD sessions
- Quarterly during campus-wide data reviews

These reviews inform immediate instructional adjustments, targeted interventions, and refinement of supports, ensuring that professional learning is directly tied to student outcomes.

Dual Credit, Early College, and Magnet Program Alignment

Professional development ensures that teachers are equipped to support students in college-level coursework and expectations, including:

- Alignment to Houston Community College (HCC) syllabi, pacing, and assessment expectations
- Training on supporting students in managing college-level workload, academic discourse, and independence
- Ongoing adjustments to dual-credit supports based on student performance data, including earlier scaffolding and intervention where needed

As a magnet school of choice, HAIS also integrates professional development aligned to its program design, including:

- Implementation of the early college graduation plan
- Global studies and interdisciplinary instruction aligned to the Asia Society ISSN model
- Ensuring equitable access to rigorous programming for all students

Professional Development Calendar

Summer (June–July)

- **Pre-AP Summer Institute / College Board Training**
Teachers participate in College Board–facilitated or district-led training focused on Pre-AP course frameworks, instructional strategies, unit design, and assessment alignment.
- **Dual Credit Alignment Sessions (HCC)**
Dual-credit instructors engage in HCC-led orientation and alignment sessions addressing course syllabi, grading policies, instructional expectations, and student supports.
- **Curriculum Mapping & Lesson Internalization**
Teachers collaborate to finalize TEKS-aligned scope and sequence, unit plans, and common assessments using College Board and HCC materials.

August (Pre-Service Week)

- **HQIM Implementation Training**
Campus-led professional learning on effective use of College Board and HCC instructional materials, lesson planning protocols, and instructional routines.
- **Data & Assessment Calibration**
Training on using formative and summative assessments embedded in College Board and HCC materials to monitor student progress.
- **Equity & Access Training**
Strategies for scaffolding rigorous instruction for emergent bilingual students, students with disabilities, and first-generation college students.

Weekly (School Year)

- **Professional Learning Communities (PLCs)**

Content-area PLCs meet weekly to:

- o Plan lessons using College Board and HCC materials
- o Analyze student work and assessment data
- o Adjust instruction and interventions based on student needs
- **Instructional Coaching Cycles**
Coaches provide classroom observations, feedback, and modeling focused on HQIM fidelity and effective instructional practices.

Quarterly

- **Data Review & Instructional Adjustment Days**
Teachers engage in structured data analysis to evaluate student progress and refine instructional approaches.
- **Vertical Alignment Meetings**
Grade-level and cross-content teams review pacing, alignment, and readiness for advanced coursework and dual credit.

Mid-Year (January)

- **Curriculum Reflection & Refinement Session**
Teachers reflect on implementation data, student outcomes, and instructional challenges to refine pacing and supports for the second semester.

Spring (March–April)

- **Advanced Instructional Strategies Workshops**
Focus on higher-order questioning, writing across content areas, and college-level academic skills aligned to College Board and HCC expectations.
- **Dual Credit Transition & Readiness Planning**
Support for students transitioning into upper-level coursework and postsecondary pathways.

Ongoing

- **Embedded Support & Feedback Loops**
Continuous walkthroughs, coaching feedback, and leadership check-ins ensure sustained improvement and consistent implementation.

This comprehensive professional development plan ensures that all instructional staff are well-prepared to implement high-quality instructional materials with fidelity, resulting in rigorous, coherent, and equitable learning experiences for all HAIS students.

d. A framework for instructional design and strategies that:

- reflect the needs of the school's target population
- ensure all students meet or exceed the expectations of Texas state standards
- promote critical-thinking skills

Houston Academy for International Studies (HAIS) implements an instructional design framework intentionally developed to meet the needs of Houston’s historically underserved and at-risk student population while ensuring all students meet or exceed the Texas Essential Knowledge and Skills (TEKS). Instruction is grounded in high expectations paired with high support, recognizing that many students enter with academic gaps, limited access to advanced coursework, and minimal exposure to college-level expectations. Teachers use College Board instructional frameworks and HISD-aligned scope and sequence documents to design lessons that scaffold learning, build academic confidence, and accelerate skill development without lowering rigor.

HAIS leverages established, high-quality curriculum systems from Houston ISD, College Board, and Houston Community College (HCC) to ensure coherence and vertical alignment across grade levels. Core courses in grades 9 and 10 utilize College Board Pre-AP frameworks to build foundational literacy, inquiry, and analytical thinking skills (<https://preap.collegeboard.org>). In grades 11 and 12, students transition into AP and HCC dual-credit coursework, aligned to College Board course frameworks and HCC syllabi that define college-level expectations and outcomes (<https://apcentral.collegeboard.org>; <https://catalog.hccs.edu>). HAIS maintains fidelity to these established scope-and-sequence structures while making targeted adjustments to pacing, scaffolding, and supports to meet the needs of its early college student population.

To ensure mastery of Texas state standards, HAIS emphasizes standards-based planning, formative assessment, and data-driven instruction. Lessons are intentionally aligned to prioritized TEKS, with clear learning objectives, success criteria, and opportunities for practice and feedback. Instructional strategies such as structured academic discourse, evidence-based writing, problem-solving routines, and spiraled review ensure that all students—including emergent bilingual students and students receiving special education services—have equitable access to grade-level content and opportunities to demonstrate mastery.

In addition, HAIS integrates Career and Technical Education (CTE) pathways beginning in grades 9 and 10, ensuring early exposure to career-connected learning. Students engage in foundational CTE coursework focused on research, digital literacy, collaboration, and career exploration aligned to programs of study such as Engineering, Entrepreneurship, Government & Public Administration, Graphic Design, and Programming. These experiences are intentionally sequenced to support project-based research in grade 11 and internships and capstone experiences in grade 12, reinforcing both academic learning and real-world application.

Critical-thinking skills are embedded across all content areas through College Board-aligned practices, project-based research, and real-world applications. Students regularly engage in analysis of complex texts, research projects, collaborative problem solving, and performance-based tasks that require them to synthesize information, defend claims with evidence, and apply learning to authentic local and global contexts. This instructional framework ensures that HAIS students not only meet state standards but also develop the higher-order thinking, independence, and academic habits necessary for success in college, careers, and civic life.

e. A plan to identify and serve students with learning gaps:

Houston Academy for International Studies (HAIS) implements a comprehensive, proactive system to identify and address student learning gaps while maintaining high academic expectations aligned to the

Texas Essential Knowledge and Skills (TEKS). Student needs are identified through multiple data points, including prior academic records, STAAR End-of-Course results, TSI diagnostics, classroom formative assessments, College Board–aligned assessments, and ongoing analysis of student work. Early identification allows staff to intervene quickly and prevent gaps from widening as coursework becomes more rigorous.

Once learning gaps are identified, HAIS provides tiered academic supports embedded within the instructional day and extended learning opportunities. Strategies include targeted small-group instruction, differentiated lesson design, and intentional scaffolding using College Board instructional frameworks. Teachers collaborate in Professional Learning Communities (PLCs) to analyze data, plan responsive instruction, and monitor progress. Students receive additional supports such as tutoring, structured intervention periods, academic workshops, and advisory check-ins focused on skill-building, organization, and study strategies.

For students enrolled in or preparing for dual-credit coursework, HAIS provides bridge supports to ensure readiness for college-level expectations, including targeted literacy and math interventions, co-requisite support, and alignment meetings with Houston Community College faculty. Progress is monitored regularly through formative and interim assessments, with adjustments made based on evidence of student growth. This systematic approach ensures that learning gaps are addressed early and effectively, allowing all students to access rigorous instruction, earn college credit, and remain on track for graduation and postsecondary success.

f. A plan to maximize instructional time:

Houston Academy for International Studies (HAIS) maximizes instructional time through intentional scheduling, efficient instructional routines, and a schoolwide focus on high-engagement, standards-aligned learning. The master schedule prioritizes core academic courses, dual-credit coursework with Houston Community College, and protected instructional blocks that minimize disruptions and transitions. Extended class periods and strategic sequencing of courses allow teachers to deliver in-depth instruction, facilitate meaningful academic discourse, and provide time for guided practice and feedback without sacrificing rigor. Instructional time is further maximized through the use of clear lesson structures, bell-to-bell instruction, and classroom routines aligned to College Board instructional frameworks. Teachers establish clear learning objectives and success criteria for every lesson, ensuring students are engaged in purposeful learning from the beginning to the end of each class period. Professional development and instructional coaching emphasize effective pacing, active learning strategies, and efficient use of instructional minutes. HAIS also uses data to reduce lost instructional time by proactively addressing attendance, credit recovery, and academic interventions. Advisory periods, targeted tutoring, and intervention supports are embedded strategically to supplement—rather than replace—core instruction. By protecting instructional minutes, maintaining high expectations for engagement, and aligning schedules to student needs, HAIS ensures students have maximum access to high-quality instruction that supports mastery of TEKS, success in college-level coursework, and timely progress toward graduation and an associate degree.

g. A justification for the proposed educational program based in research, theory,

and/or experience, including why it is likely to be effective for the anticipated student population:

The educational program at Houston Academy for International Studies is grounded in a strong body of research, theory, and demonstrated practice indicating that early college high school models are particularly effective for historically underserved and at-risk students. National studies conducted by the American Institutes for Research (AIR) and supported by the U.S. Department of Education’s Institute of Education Sciences (IES) have found that students enrolled in Early College High Schools are significantly more likely to graduate from high school, enroll in college, and earn postsecondary credentials—especially associate degrees—than their peers in traditional high schools. These positive outcomes are strongest for low-income students, first-generation college students, and students from underrepresented racial and ethnic groups, directly aligning with the population HAIS serves. The HAIS program is also grounded in well-established educational theory that emphasizes high expectations combined with strong academic and social support, relevance of learning, and access to rigorous coursework. By aligning instruction to TEKS, implementing College Board curriculum, and integrating Houston City College dual-credit coursework, HAIS ensures coherence between secondary and postsecondary learning while accelerating students’ progress toward meaningful credentials. Research consistently shows that exposure to college-level coursework in high school—when paired with intentional supports—builds academic confidence, persistence, and college readiness for students who might otherwise lack access to advanced opportunities. In addition, HAIS’s incorporation of Career and Technical Education pathways beginning with foundational CTE courses in 9th and 10th grades, and expanding to project-based research in 11th grade, and practicum internships in 12th grade reflects research on experiential and applied learning, which demonstrates increased student engagement, deeper learning, and stronger connections between academic content and real-world application. This approach is especially effective for students who benefit from seeing the relevance of their learning to careers, community impact, and civic participation. Finally, HAIS’s own performance provides compelling evidence of effectiveness. The school has earned a National Blue Ribbon designation, maintained TEA A-rated campus status, achieved exceptionally high college-going rates, and demonstrated sustained success in associate degree attainment while students are still in high school. Together, the research base and HAIS’s proven outcomes indicate that this educational program is well-designed to improve academic achievement, close opportunity gaps, and prepare the anticipated student population for college, careers, and informed participation in their democracy and an interconnected world.

Houston Academy for International Studies (HAIS) has a demonstrated track record of success implementing the early college, College Board–aligned instructional model proposed in this application. The school consistently achieves strong outcomes for a student population that is predominantly economically disadvantaged and first-generation college-bound.

Key outcomes include high graduation and college-going rates, strong College, Career, and Military Readiness (CCMR) performance, and significant associate degree and college credit attainment prior to high school graduation. HAIS has also earned repeated TEA accountability ratings at the “A” level and National Blue Ribbon School recognition, providing strong evidence that the proposed educational model is effective and sustainable for the targeted student population.

Indicator	HAIS Outcome	Comparison
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Graduation Rate	100%	86% (HISD)
CCMR	99%	86% (HISD)
Associate Degree Attainment	70%	39% (Texas ECHS)
College Credit Earned	100%	70% (Texas ECHS)
TEA Accountability	A-Rated	

HAIS demonstrates strong performance across multiple key academic and readiness indicators. Graduation rates are at 100%, dropout rates are 0%, absenteeism is well below district and state averages, and college readiness indicators for reading notably exceed district and statewide norms. Students also benefit from structured dual-credit opportunities through Houston Community College, providing access to postsecondary credentials. Together, these data points substantiate the effectiveness of HAIS's instructional and early college model.

*Information from <https://tea.texas.gov/>

List of References Used and Summary of findings:

American Institutes for Research (AIR) (2019) *Early College High Schools Have a Positive Impact on Postsecondary Enrollment and Success.*

<https://www.air.org/news/press-release/early-college-high-schools-have-positive-impact-postsecondary-enrollment/>

Good Reason Houston. (2024). *Are Houston-region graduates earning enough?*

Analysis of postsecondary outcomes and living-wage attainment for Houston-area high school graduates, showing fewer than 20% earn a living wage six years after graduation and highlighting the economic value of postsecondary credentials.

<https://goodreasonhouston.org/are-houston-region-graduates-earning-enough/>

Good Reason Houston. (2025). *Houston ConnectED: Postsecondary outcomes and workforce alignment.*

Research demonstrating the relationship between rigorous high school coursework, credential attainment, and long-term economic outcomes for Houston students.

https://goodreasonhouston.org/wp-content/uploads/2025/12/GoodReasonHouston_Postsecondary_Report_January2025.pdf

MIT Sloan School of Management. (2024). *Living Wage Calculator: Harris County, Texas.*

Provides estimates of the hourly wage required to meet basic needs in the Houston area, illustrating that wages for many jobs available to high school graduates fall below a living wage threshold.

<https://livingwage.mit.edu/counties/48201>

Texas Education Agency. (Multiple years). *Early College High School outcomes reports.*

Statewide research indicating that early college high schools improve graduation rates, postsecondary enrollment, and credential attainment for economically disadvantaged and first-generation students.

<https://tea.texas.gov/academics/special-student-populations/special-education/data-and-reports/post-school-outcomes>

Texas Tribune. (2024). *Houston Academy for International Studies school profile.*

Publicly available data reflecting HAIS graduation rates and academic outcomes compared to local and state averages.

<https://schools.texastribune.org/districts/houston-isd/houston-academy-for-international-studies/>

High School Graduation Requirements (*High Schools Only*)

2. Provide the following:

- a. **As Attachment 1, exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do and ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce).**

Attachment 1 included?

☒ YES ☐ NO

- b. **Systems and procedures the school will implement for students at risk of dropping out or not meeting exit standards:**

Houston Academy for International Studies (HAIS) implements a comprehensive, multi-tiered system to ensure that all students, particularly those identified as at risk of dropping out or not meeting graduation and early college exit standards, receive timely, coordinated academic and social-emotional support. The system is aligned to Houston ISD intervention frameworks, TEA accountability requirements, and HAIS's early college mission.

Early Identification and Monitoring

Students are continuously monitored using multiple indicators including:

- Attendance, course grades, and credit accumulation
- STAAR EOC, MAP growth, and TEA Interim STAAR data
- TSI, SAT, AP, and dual-credit performance
- Behavioral and engagement data
- Counselor and teacher referrals

This data is reviewed weekly in Grade Level PLCs. Students who fall below established benchmarks (attendance below 93%, failing a course, not on track for credits, or missing college readiness milestones) are automatically flagged for intervention.

Tiered Intervention System

Tier 1 – Classroom & Advocacy Supports

Every student is supported through the daily Advocacy period, where advisors monitor grades, attendance, and college readiness, support goal-setting, and intervene early. Teachers provide reteaching, tutoring, and academic supports within core classes. In addition, every student participates in mentoring through Big Brothers Big Sisters.

Tier 2 – Targeted Academic and Counseling Interventions

Students showing risk indicators receive:

- Small-group or one-on-one tutoring
- Credit recovery or acceleration supports
- Counseling and family outreach
- Targeted college-readiness support for dual-credit and TSI success

Tier 3 – Intensive Wraparound Supports

Students at high risk of dropping out receive coordinated support through:

- Counselor-led case management
- Attendance and engagement plans
- External service referrals
- Mentoring through Big Brothers Big Sisters
- Career and postsecondary planning interventions

Exit Standard Alignment

HAIS aligns all interventions to the school's **graduation and early college exit standards**, including:

- Credit completion and STAAR EOC passing
- TSI readiness and dual-credit success
- Associate degree progress
- College and career readiness benchmarks

Progress toward exit standards is reviewed regularly in PLCs, counseling meetings, and leadership data reviews.

Family and Community Partnership

Families are engaged through conferences, workshops, and regular communication when students are identified as at risk. Community and higher education partners—including Houston Community College, Big Brothers Big Sisters, and Ernst & Young—provide additional mentoring, academic, and career supports.

Accountability and Continuous Improvement

Campus leadership reviews risk data bi-weekly and adjusts supports, staffing, and interventions

as needed. These systems ensure that every student has a clear, supported pathway to graduation, college readiness, and postsecondary success.

Special Populations and At-Risk Students

3. Provide the following:

- a. **An explanation of evidence from which the projection of anticipated special populations was derived:**

The projection of anticipated special populations was derived based on current and historic data from HAIS over the past 19 years.

- b. **An explanation of the organization's experience in, understanding of, and capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted:**

Houston Academy for International Studies (HAIS) has deep experience and proven capacity to fulfill all state and federal requirements for students with disabilities, emergent bilingual students, and students identified as intellectually gifted through its alignment with Houston ISD's established systems, policies, and compliance frameworks. As an HISD campus, HAIS implements district-approved procedures for IDEA, Section 504, LPAC, ARD, and Gifted/Talented identification and services, ensuring full compliance with Texas Education Code, ESSA, and federal civil rights requirements.

HAIS leadership and staff are trained in HISD's best practices for identification, service delivery, documentation, progress monitoring, and parent engagement, allowing the campus to provide inclusive, equitable, and legally compliant services while maintaining high academic expectations. Through integrated data systems, collaborative teams, and ongoing professional development, HAIS ensures that students with special needs, emergent bilingual students, and gifted learners have appropriate access to rigorous instruction, required supports, and enrichment opportunities that promote success in an early college environment.

- c. **A plan for providing services to students with special needs, including how you ensure these students:**

- **are appropriately identified**
- **are served in the least-restrictive environment possible**
- **have appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities in ways that support their development**
- **receive required and appropriate support services as outlined in their Individualized Education Plans and 504 plans**
- **participate in standardized testing**

Houston Academy for International Studies will implement Houston ISD's best-practice systems and procedures for serving students with disabilities in full compliance with IDEA, Section 504, and Texas Education Code. Through HISD's Child Find, evaluation, and ARD/504 processes, students are

appropriately identified and placed based on individual needs. HAIS follows HISD's least-restrictive environment (LRE) framework, ensuring that students are educated alongside their non-disabled peers whenever appropriate, with supports and accommodations embedded in the general education setting.

Students are identified through referral, evaluation, and ARD committee processes. Services include:

- Inclusion-based instructional models with accommodations and modifications
- Co-teaching and support facilitation as appropriate
- Implementation of IEP and 504 accommodations within general education classrooms
- Progress monitoring toward IEP goals using data-driven measures

Students with disabilities participate in standardized testing with allowable accommodations and are included in all schoolwide academic, extracurricular, and culture-building activities to support social and academic development.

Students with special needs have full access to the TEKS-aligned general education curriculum, early college coursework, extracurricular programs, and schoolwide culture-building activities, with accommodations and modifications provided as outlined in their IEPs and 504 plans. HISD service delivery models ensure that required instructional, counseling, and related services are implemented with fidelity, and that progress is monitored through data reviews and ARD/504 meetings. Students participate in state and local standardized assessments with appropriate testing accommodations as determined by their ARD or 504 committee, ensuring both access and accountability within HAIS's rigorous early college environment.

d. A plan for providing services to emergent bilingual students, including:

- **methods for appropriate identification,**
- **specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the general education curriculum and core academic program for these students,**
- **plans for monitoring and evaluating student progress and success and for exiting them from services,**
- **a plan for including emergent bilingual students in standardized testing and schoolwide educational, extra-curricular, and culture-building activities**

Houston Academy for International Studies (HAIS) has deep experience and proven capacity to fulfill all state and federal requirements for students with disabilities, emergent bilingual students, and students identified as intellectually gifted through its alignment with Houston ISD's established systems, policies, and compliance frameworks. As an HISD campus, HAIS implements district-approved procedures for IDEA, Section 504, LPAC, ARD, and Gifted/Talented identification and services, ensuring full compliance with Texas Education Code, ESSA, and federal civil rights requirements.

HAIS leadership and staff are trained in HISD's best practices for identification, service delivery, documentation, progress monitoring, and parent engagement, allowing the campus to provide inclusive, equitable, and legally compliant services while maintaining high academic expectations. Through integrated data systems, collaborative teams, and ongoing professional development, HAIS ensures that students with special needs, emergent bilingual students, and gifted learners have appropriate access to

rigorous instruction, required supports, and enrichment opportunities that promote success in an early college environment.

Houston Academy for International Studies (HAIS) provides a comprehensive, compliant, and research-based program to ensure emergent bilingual students have equitable access to the general education curriculum while developing academic English proficiency. HAIS follows HISD Language Proficiency Assessment Committee (LPAC) procedures to identify, place, monitor, and exit EB students in accordance with state and federal requirements.

Instructional Programs, Practices, and Strategies

Emergent bilingual students receive instruction through **TEKS-aligned content courses** with intentional language supports embedded across all subject areas. Instructional strategies include:

- Content-based language development
- Explicit academic vocabulary instruction and language objectives aligned to content objectives
- Structured oral language practice (turn-and-talks, academic discourse, sentence frames)
- Use of visual supports, graphic organizers, and multilingual resources
- Differentiated scaffolds aligned to students' English proficiency levels (Beginning–Advanced High)

Teachers are trained in culturally responsive instruction, language acquisition strategies, and differentiation to ensure EB students can access rigorous coursework, including Pre-AP, AP, and dual-credit classes.

Monitoring, Evaluation, and Exit

Student progress is monitored through:

- TELPAS proficiency ratings
- Classroom formative assessments
- Interim assessments (MAP, STAAR Interims)
- Course performance and language growth data reviewed regularly in PLCs and LPAC meetings

EB students are exited from services based on **state-defined criteria**, with post-exit monitoring conducted to ensure continued academic success.

Assessment and Campus Inclusion

Emergent bilingual students participate in all required standardized assessments with appropriate linguistic accommodations as determined by LPAC. EB students are fully included in schoolwide academic programs, extracurricular activities, student-led clubs, leadership opportunities, and cultural events, reinforcing belonging, engagement, and shared ownership of the school community.

e. A plan for providing services to students identified as intellectually gifted, including:

- **methods for appropriate identification of students**
- **the specific instructional programs, practices, and strategies the school will employ**

Houston Academy for International Studies (HAIS) provides equitable and rigorous services for students identified as intellectually gifted in alignment with the Texas State Plan for the Education of Gifted/Talented Students and Houston ISD identification and service protocols. The goal is to ensure that gifted learners, particularly those from historically underserved populations, are appropriately identified and challenged within the school's early college model.

Methods for Identification

HAIS follows **Houston ISD's district-approved GT identification procedures**, which include:

- Universal screening at designated grade levels using district-approved cognitive and academic assessments
- Review of STAAR EOC, MAP, College Board, and classroom performance data
- Teacher, parent, and student referrals supported by documented evidence of advanced academic performance or potential
- Qualitative data, including work samples, performance tasks, and observations

All data are reviewed by a **campus selection committee** in accordance with HISD timelines to ensure fair, unbiased, and equitable identification.

Instructional Programs, Practices, and Strategies

Students identified as intellectually gifted are served through a combination of acceleration, enrichment, and differentiated instruction embedded within the HAIS early college framework. Key strategies include:

- Access to advanced coursework, including Pre-AP, AP, and Houston Community College dual-credit courses, allowing gifted students to engage in college-level curriculum aligned to their academic readiness
- Differentiated instruction through curriculum compacting, tiered assignments, flexible grouping,

and extension tasks

- Project-based research and interdisciplinary learning, particularly in upper grades, where students engage in independent inquiry and real-world problem solving
- CTE-aligned pathways and internships, allowing gifted students to apply advanced academic skills in authentic professional contexts
- Higher-order questioning and academic discourse aligned to College Board instructional frameworks

Student progress is monitored through PLCs, assessment data, and college-readiness indicators to ensure that gifted learners are consistently challenged and supported. Through this approach, HAIS ensures intellectually gifted students reach their full potential while contributing meaningfully to the school's early college learning community.

Student Recruitment and Enrollment

4. Provide the following:

- a. **A student recruitment and marketing plan.**
 - **What is the timeline for implementation of this plan?**
 - **How will you ensure all interested students and families, including those in poverty, students who have struggled academically, students with disabilities, and other youth at risk of academic failure, are equally included in this plan?**

Houston Academy for International Studies (HAIS) implements a comprehensive, equitable student recruitment and marketing plan aligned with Houston ISD Magnet program timelines and designed to ensure broad access for all students, particularly those from historically underserved and at-risk populations. Recruitment activities are structured to align with district application windows, lottery deadlines, and school choice events, ensuring families receive timely, accurate information to make informed enrollment decisions.

Timeline for Implementation

Recruitment activities begin each fall in alignment with Houston ISD Magnet application and school choice deadlines and continue through the spring enrollment period. The annual recruitment cycle includes:

Fall (September–November): Outreach aligned to HISD Magnet program application launch, including middle school visits, school choice fairs, and campus tours. Promote our Phoenix Festival on 2nd Saturday in November to all potential students as a recruitment event.

Winter (December–January): Continued middle school outreach, application support for families, and participation in district and community-based school choice fairs prior to application deadlines. Visit PTO Meetings and local recruitment fairs, target students who meet the TEA ECHS Access OBMs including low-income and at-risk.

Spring (February–May): Follow-up outreach, waitlist communication, and enrollment confirmation, including targeted engagement with families who need additional support completing enrollment steps.

Year-Round: Ongoing tours, community engagement, and outreach to ensure continuous access to information.

Equitable Access and Inclusive Outreach

H AIS ensures equal inclusion of all interested students and families through multiple, intentional outreach strategies:

Middle School Outreach: H AIS visits every Houston ISD middle school, with targeted, additional outreach to nearby campuses serving high concentrations of low socioeconomic and at-risk students. Outreach includes classroom presentations, counselor meetings, and informational sessions.

Family Engagement: Staff attend PTO meetings, host information sessions during and after school hours, and engage directly with students and families to explain program expectations, supports, and opportunities.

Campus Tours: The campus is open for weekly tours every Thursday, as well as by appointment upon request, ensuring accessibility for working families.

After-School and Weekend Events: H AIS hosts after-school and weekend recruitment events to accommodate families with varying schedules.

School Choice Fairs: The school participates in at least four school choice fairs annually, including events hosted by Houston ISD and those organized by community-based organizations, expanding access beyond traditional district channels.

Application Support: Staff provide hands-on assistance with the magnet application process, including guidance for families with language, technology, or transportation barriers.

Through alignment with HISD Magnet timelines, proactive outreach across all middle schools, and multiple access points for families, H AIS ensures that students in poverty, students who have struggled academically, students with disabilities, and other youth at risk of academic failure have equitable opportunities to learn about, apply to, and enroll in the school.

- b. **As Attachment 2, an Enrollment Policy that complies with state law, includes a description of the lottery process if more students choose to enroll at the campus than can be accommodated, and that ensures the school will be open to all eligible students.**

☒ Attachment 2 included? ☒ YES ☐ NO

School Culture and Discipline

5. Provide the following:

- a. A vision for school culture or ethos that will promote high expectations, a positive and safe academic environment, and shared ownership of intellectual and social development for all students, including students served in special education, emergent bilingual students, and students at risk of academic failure:**

Houston Academy for International Studies fosters a school culture grounded in high expectations, belonging, and shared responsibility for the intellectual and social growth of every student. The campus is intentionally designed as a small school community to promote strong relationships, personalization, and consistent adult support, ensuring that all students, including students served in special education, emergent bilingual students, and those at risk of academic failure are known well and supported to meet rigorous academic standards.

HAIS promotes a safe, inclusive, and academically focused environment where learning is collaborative and diversity is recognized as a strength. A cornerstone of the school culture is a daily Advocacy period, during which students meet consistently with a designated adult advocate. This structure provides dedicated time to support both academic monitoring and socio-emotional well-being, including goal setting, progress tracking, college and career planning, and social-emotional learning. The Advocacy period ensures early identification of academic or non-academic challenges and allows for timely, personalized interventions.

Students are encouraged to take ownership of their learning through reflection, academic discourse, and engagement in college-level and real-world experiences. Shared ownership extends to families, educators, and community partners, who collaborate to support student success. Through consistent expectations, restorative practices, and a commitment to equity and access, HAIS creates a learning environment where all students feel valued, challenged, and empowered to succeed academically, develop as engaged citizens, and prepare for college, careers, and participation in a global society.

- b. A plan for establishing the intended culture for students, teachers, administrators, and parents from the first day of school and throughout the school year and proposed mechanisms for monitoring and maintaining campus climate:**

Houston Academy for International Studies establishes its intended school culture prior to the first day of school and sustains it throughout the year through intentional, structured systems that promote belonging, academic readiness, and shared responsibility. Each year begins with a two-week Bridge Camp for incoming students that focuses on academic preparation, school systems and routines, and social-emotional learning (SEL). During Bridge Camp, students build foundational skills, learn behavioral and academic expectations, and develop relationships with peers, teachers, and their designated Advocate.

Bridge Camp also includes parent workshops designed to orient families to graduation requirements, early college expectations, support systems, and communication structures. In partnership with Houston Community College (HCC), the school co-plans activities that introduce students to the college environment, including navigating a college campus, understanding college expectations, and developing early college-going identity and confidence.

From the first instructional day and throughout the school year, HAIS maintains its culture through daily Advocacy periods, consistent routines, and clear expectations for students, teachers, and administrators. Teachers collaborate in grade-level Professional Learning

Communities (PLCs) to analyze academic and social-emotional data, identify student needs, and coordinate interventions and enrichment. Parent conferences are embedded within PLC structures, ensuring regular, proactive communication and shared accountability for student progress.

Houston Academy for International Studies intentionally establishes and sustains a positive, inclusive school culture that promotes high expectations, student engagement, and shared ownership of intellectual and social development through structured Student-Led Clubs. Every Friday, students participate in a 45-minute Student-Led Club block embedded within the instructional day. Students propose, design, and lead clubs aligned to their interests, goals, and aspirations. This model empowers students to exercise voice, leadership, and responsibility while fostering a safe and supportive academic environment where all students feel a sense of belonging. Teachers and administrators serve as facilitators, reinforcing respectful collaboration, inclusivity, and accountability. Participation, attendance, and student feedback from Student-Led Clubs are reviewed as part of HAIS's ongoing campus climate monitoring systems, including student surveys and advisory check-ins, allowing leadership to identify trends, respond to student needs, and continuously strengthen school culture throughout the year.

Campus climate is continuously monitored through regular surveys of students and parents, as well as ongoing review of attendance, discipline, and academic data. Leadership teams analyze these data to identify trends, celebrate strengths, and implement responsive action steps. Through early onboarding, strong family partnerships, collaboration with higher education, and continuous feedback loops, HAIS sustains a positive, inclusive, and academically focused school culture aligned to its mission and the needs of its students.

c. A plan to create an inclusive and welcoming environment that will engage families in positive, constructive, and personalized ways:

Families are welcomed through regular workshops and informational sessions designed to help them understand the school's early college programming, graduation requirements, and college expectations. These sessions also provide families with guidance on scholarship opportunities, financial aid, local and international travel experiences, and study-abroad programs, ensuring equitable access to enrichment opportunities that are often less accessible to students from underserved communities. By demystifying these processes, HAIS empowers families to support students in pursuing postsecondary and global learning experiences.

HAIS offers volunteering opportunities that allow families to contribute their time, skills, and expertise, strengthening school to community connections and shared ownership of the school's mission. Family engagement is further supported through an active Parent Teacher Organization (PTO), which provides families with a structured voice in school activities, decision-making, and community-building efforts.

In addition, HAIS hosts cultural events, celebrations, and festivals throughout the year that honor and celebrate each family's unique heritage, culture, and contributions. These events foster cultural understanding, inclusion, and a strong sense of belonging. Through consistent communication, inclusive practices, and meaningful opportunities for participation, HAIS ensures that families are engaged in positive, constructive, and personalized ways that strengthen student success and the broader school community.

d. A system of proactive and responsive student support services (e.g., counseling, mentoring, external service referrals) to meet student needs:

Houston Academy for International Studies implements a comprehensive, proactive system of student support services designed to identify student needs early, respond effectively, and sustain student success academically, socially, and emotionally. As an intentionally small school, HAIS leverages strong relationships, daily contact, and frequent collaboration among staff to ensure that no student goes unnoticed.

Proactive Mental Health and Wellness Instruction

HAIS proactively teaches mental health and wellness skills to all students through multiple, structured opportunities embedded within the school year. Mental health and social-emotional learning instruction occurs during the daily Advisory period, where students engage in age-appropriate lessons focused on stress management, emotional regulation, healthy relationships, goal setting, self-advocacy, and help-seeking behaviors. In addition, mental health instruction is introduced and reinforced during the two-week Bridge Camp prior to the start of the school year, which includes explicit lessons on wellness, coping strategies, and navigating academic and personal stress in an early college environment. Targeted lessons and assemblies facilitated by the school counselor and community partners are also provided at key points in the year, such as exam preparation periods and college application season.

Ongoing Monitoring and Targeted Support

Grade-level teaching teams meet weekly in PLCs to review academic performance, attendance, behavior, and social-emotional indicators. During these meetings, teachers collaboratively identify students who may be struggling, develop targeted academic or social-emotional interventions, and initiate referrals for additional supports. This team-based, data-driven approach ensures timely identification of concerns, coordinated responses across classrooms, and consistent follow-through over time.

HAIS employs a dedicated school counselor who provides academic counseling, college and career guidance, and social-emotional support. The counselor works closely with teachers, administrators, students, and families to address emerging concerns and monitor the progress of students receiving targeted supports.

Intensive and Crisis-Level Supports

For students with significant mental health needs or those experiencing crisis, HAIS provides immediate and intensive intervention. The school counselor conducts risk assessments and safety planning, and administrators respond promptly to ensure student safety. Families are notified, and students are connected to external mental health providers for ongoing counseling, therapy, or psychiatric services as appropriate. HAIS follows HISD crisis response protocols, including emergency services when there is an immediate risk to student safety. HISD has school psychologists on call to respond to such crises. Follow-up and monitoring are conducted to ensure continuity of care and successful reintegration into the school setting.

Mentoring and External Partnerships

Mentorship is a core component of the HAIS support model. Through a partnership with Big Brothers Big

Sisters, every HAIS student is matched with a mentor who provides consistent guidance, encouragement, and advocacy throughout high school and beyond. In addition, HAIS partners with Ernst & Young to provide targeted mentorship for students in grades 11 and 12 and continued support during students' first year of college, strengthening persistence through critical transition points.

Together, these layered supports—proactive mental health instruction, frequent staff collaboration, counseling services, crisis response systems, and sustained mentorship partnerships—create a responsive and comprehensive support framework that promotes student well-being, addresses both academic and mental health needs, and supports long-term success in high school, college, and career pathways.

- e. **As Attachment 3, a student discipline policy that provides for appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture while respecting student rights:**

Attachment 3 included? ☒ YES ☐ NO

- f. **Legally sound policies for student discipline, suspension, and expulsion, including how these policies protect students' rights to due process:**

Houston Academy for International Studies implements Houston ISD's legally sound policies and procedures for student discipline, suspension, and expulsion, ensuring full compliance with Texas Education Code, federal due process requirements, and civil rights protections. These district-approved policies provide clear standards for student behavior, progressive disciplinary responses, and formal procedures for investigations, hearings, and appeals. HAIS follows HISD protocols to guarantee that all students and families receive timely notice, the opportunity to be heard, and fair, consistent application of disciplinary actions, while prioritizing restorative practices and student supports to keep students engaged in learning whenever possible.

- g. **Systems and processes for tracking discipline referrals and interventions to identify trends and adapt activities accordingly:**

Houston Academy for International Studies implements Houston ISD's districtwide discipline tracking and reporting systems to monitor student behavior, referrals, and interventions in real time. All discipline incidents are entered into HISD's student information and behavior management platforms, allowing campus leadership and counselors to analyze data by student, grade level, subgroup, location, and type of infraction.

The leadership team reviews discipline data weekly and monthly to identify patterns, such as repeated referrals, disproportionality, or high-incidence locations or times of day. These analyses inform targeted responses, including adjustments to supervision plans, restorative practices, counseling supports, schedule changes, and staff professional development. Data are also reviewed in grade-level PLCs and Advocacy meetings to ensure that behavioral concerns are addressed early and in coordination with academic and social-emotional supports.

Through continuous data monitoring and responsive intervention, HAIS ensures that discipline practices remain fair, effective, and aligned with the school's commitment to a safe, supportive, and academically focused learning environment.

Assessment and Evaluation

6. Provide the following:

- a. **Annual student performance goals that include targets aligned with the state accountability system:**

Houston Academy for International Studies sets annual student performance goals that are grounded in the school's historical performance, proven capacity for continuous improvement, and alignment to the Texas state accountability system. Based on HAIS's track record as a TEA A-rated campus and National Blue Ribbon School, the school establishes ambitious yet attainable targets that reflect both sustained excellence and strategic growth.

Annual goals include:

STAAR End-of-Course (EOC) Performance: Maintain performance at or above state standards across all tested subjects, with annual improvement targets for students identified as at risk, emergent bilingual, and receiving special education services, informed by prior years' performance data.

College, Career, and Military Readiness (CCMR): Build on HAIS's historically high CCMR outcomes by increasing the percentage of students meeting college readiness benchmarks through dual-credit completion, SAT and TSI readiness, AP exam participation and performance, and continued growth in associate degree attainment.

Graduation and Persistence: Sustain a four-year graduation rate that exceeds state averages, with targeted supports to ensure consistent credit completion and cohort persistence.

Academic Growth: Demonstrate year-over-year academic growth across all grade levels and content areas, with a focus on closing achievement gaps and accelerating progress for historically underserved student groups.

Associate Degree Attainment: Demonstrate year-over-year academic growth in percentage of graduating class earning their Associate Degree and continuing to outperform the State ECHS average of 39%.

Postsecondary Outcomes: Increase the percentage of graduates earning an associate degree or completing substantial college credit prior to graduation, building on HAIS's established success in early college outcomes.

These goals reflect HAIS's strong foundation of success and its intentional focus on scaling impact, using data-driven decision-making and continuous improvement to ensure even greater

outcomes for future students.

b. A plan to implement and interpret interim assessments that measure academic progress – of individual students and student cohorts – throughout the school year:

Houston Academy for International Studies implements a comprehensive, data-driven system of interim assessments to monitor academic progress for individual students and student cohorts throughout the school year. This system is intentionally aligned to TEKS, College Board expectations, Houston Community College (HCC) course requirements, and the Texas state accountability framework to ensure coherence and rigor.

Interim assessments include TEA Interim STAAR assessments administered throughout the year to measure progress toward End-of-Course standards and predict state assessment performance. In addition, HAIS administers NWEA MAP assessments at the Beginning of Year (BOY), Middle of Year (MOY), and End of Year (EOY) to provide nationally normed growth data in reading and mathematics. These measures are supplemented by standards-aligned unit assessments, common performance tasks, and College Board–embedded assessments across content areas. For dual-credit courses, HCC assessments are used to validate college-level mastery and readiness.

Assessment data are analyzed through weekly grade-level and content-area PLCs, where teachers examine individual student performance, cohort trends, and subgroup outcomes to identify strengths, learning gaps, and areas for instructional adjustment. Instructional coaches and campus leadership support data interpretation and alignment to instructional priorities, ensuring timely reteaching, enrichment, and differentiated supports.

Student progress is also monitored during the daily Advocacy period, where advisors review grades, assessment results, attendance, and college readiness indicators with students. Families receive regular updates through conferences and ongoing communication, reinforcing shared accountability for student growth. Through intentional implementation and collaborative analysis, HAIS uses interim assessment data to drive continuous improvement and ensure equitable academic outcomes for all students.

c. A plan and system for collecting and analyzing student academic achievement data, reporting the data to the school community, and using the data to refine and improve instruction (including dedicated time for providing training and support to school leadership and teachers):

Houston Academy for International Studies (HAIS) maintains a comprehensive, coherent system for collecting, analyzing, and using student academic achievement data to drive continuous improvement, ensure equity, and support high levels of academic performance across its early college model. This system aligns with TEKS, Texas state accountability requirements, College Board curriculum, and Houston Community College (HCC) dual-credit expectations.

Data Collection Systems

HAIS collects multiple sources of academic data to provide a complete picture of student performance, including:

- STAAR End-of-Course (EOC) and TEA Interim STAAR results
- NWEA MAP BOY/MOY/EOY growth assessments
- SAT, TSI, and AP exam results
- Course grades, common assessments, and College Board-embedded assessments
- HCC dual-credit course performance and college readiness indicators

All data are housed in Houston ISD and campus-level data platforms that allow teachers, counselors, and administrators to track individual student progress, subgroup trends, and cohort performance in real time.

Data Analysis and Instructional Decision-Making

Teachers analyze data during weekly grade-level and content-area PLCs, which are protected collaboration times focused on student achievement. During PLCs, staff:

- Examine student performance by standard and subgroup
- Identify learning gaps and strengths
- Design reteaching, intervention, and enrichment plans
- Monitor the impact of instructional strategies

Instructional coaches and campus leaders participate in these meetings to ensure consistency, alignment to TEKS and College Board frameworks, and effective use of data.

Training and Support for Staff

HAIS provides dedicated professional learning for school leadership and teachers on:

- Data interpretation and instructional planning
- Use of MAP, STAAR, and College Board data
- Differentiation and intervention strategies
- Progress monitoring and equity-focused decision-making

This training is embedded throughout the year through PD sessions, PLC facilitation, and coaching cycles, ensuring educators have the skills and support needed to use data effectively.

Student and Family Reporting

Data are shared transparently with the school community through:

- Student-led conferences and parent conferences
- Advisory/Advocacy meetings, where students track their own progress
- Family workshops and regular progress reports

These systems promote shared ownership of learning and allow families and students to actively participate in goal setting and improvement.

Continuous Improvement

Campus leadership conducts regular data reviews to evaluate progress toward campus goals, identify trends, and adjust instructional priorities, staffing supports, and intervention structures. This continuous feedback loop ensures that instruction, supports, and resources remain aligned to student needs and the school's academic goals.

Through structured data systems, protected collaboration time, ongoing professional learning, and transparent communication, HAIS ensures that academic data is used strategically to strengthen instruction, close achievement gaps, and support college-ready outcomes for all students.

- d. **The corrective actions that the school and network (if applicable) will take if either falls short of the goals at any level, including explanation of what would trigger such actions and who would implement them:**

Houston Academy for International Studies (HAIS) maintains a clear, data-driven corrective action framework to ensure timely intervention when academic, operational, or student-outcome goals are not being met. This framework is aligned to Houston ISD accountability systems, TEA performance standards, and HAIS's early college mission to produce strong postsecondary outcomes for all students.

Triggers for Corrective Action

Corrective actions are initiated when one or more of the following indicators fall below established targets:

- **STAAR EOC or TEA Interim STAAR performance** falls below campus growth or proficiency benchmarks
- **NWEA MAP growth targets** are not met at the cohort or subgroup level
- **College readiness indicators** (SAT, TSI, AP, dual-credit pass rates, or associate degree progress) decline or fail to meet targets
- **Graduation, attendance, or credit completion rates** fall below expectations
- **PLC, walkthrough, or classroom data** indicate inconsistent instructional quality or misalignment to College Board and TEKS standards

Houston Academy for International Studies (HAIS) uses clearly defined, quantitative performance thresholds to identify concerns early and initiate timely corrective action. Triggers are monitored at the student, subgroup, grade-level, and campus level through regular data reviews.

Below is an example of proposed performance triggers that may be used to trigger tiered interventions:

Performance Triggers

Indicator	Benchmark	Trigger for Intervention	Monitoring Frequency
MAP Growth	≥ 65% of students meet or exceed expected growth	< 60% of students meet expected growth	BOY / MOY / EOY
STAAR EOC – Meets Grade Level	≥ 75% Meets	< 70% Meets in any tested subject	Annually / Interim
STAAR EOC – Growth	≥ 65% demonstrate growth	< 60% demonstrate growth	Annually
Dual-Credit Pass Rate	≥ 85% pass	< 75% pass any dual-credit course	Each semester
TSI College Readiness	≥ 70% meet readiness	< 65% meet readiness	Each testing window
AP Exam/OnRamps Pass Rate	≥ 50% pass	< 40% pass	Annually
Attendance	≥ 95%	< 94% campus or subgroup average	Monthly
On-Track HS Credit Completion	≥ 95% on track	< 90% on track	Each grading cycle

Tiered Response System

When a trigger is activated, HAIS implements a tiered response process:

Houston Academy for International Studies (HAIS) implements a tiered, data-driven corrective action system to address both interim and annual academic and attendance goals. Corrective actions are triggered by clearly defined quantitative indicators and are implemented through a graduated response that prioritizes early intervention, family engagement, and student support.

Triggers for Corrective Action

Corrective actions are initiated when one or more of the following indicators fall below established benchmarks:

- Attendance falls below 94% for an individual student, subgroup, grade level, or campus-wide
- MAP growth falls below expected growth benchmarks
- STAAR interim or EOC performance falls below targeted proficiency or growth thresholds
- Credit completion indicates a student is off track for graduation
- Dual-credit or AP course performance falls below passing expectations

Triggers are reviewed during weekly PLC meetings, monthly leadership reviews, and quarterly board dashboard reviews to ensure timely identification and response.

Tiered Response and Supports

Tier 1: Classroom- and Student-Level Intervention (Immediate Response)

Who Implements: Classroom teachers, advisors, and grade-level PLC teams

Tier 1 supports are implemented immediately upon identification of an early warning indicator and focus on preventative, individualized actions, including:

- Small-group instruction and targeted reteaching during class or intervention periods
- Individual student conferences focused on goal setting, attendance habits, and academic progress
- Parent/guardian contact to communicate concerns, expectations, and strategies for support
- Advisory check-ins to monitor progress and reinforce accountability
- Classroom-based accommodations or instructional adjustments as needed

Tier 1 interventions are documented and monitored over a 2–4 week period to assess effectiveness.

Tier 2: Targeted Campus-Level Intervention

Who Implements: Assistant Principals, Counselor, Instructional Leaders

If progress is insufficient after Tier 1 supports:

- Students are referred for targeted academic intervention, tutoring, or counseling support
- Attendance contracts and structured improvement plans may be implemented
- Additional parent conferences are conducted to align on supports and expectations
- Progress is monitored weekly by campus leadership

Tier 2 interventions are sustained for 4–6 weeks, with adjustments made based on student response.

Tier 3: Intensive and Individualized Intervention

Who Implements: Principal/Executive Director, Counselor, Support Teams

For students who continue to struggle:

- Individualized intervention plans are developed
- External support services or mentoring referrals may be initiated
- Administrative review and intensified monitoring occur
- Board notification occurs if concerns rise to a campus-level trend

Tier 3 interventions remain in place until benchmarks are met or additional supports are identified.

Accountability and Continuous Improvement

Corrective action effectiveness is evaluated through:

- Ongoing student progress monitoring

- Review of attendance and academic trends
- Leadership walkthroughs and data reviews
- Quarterly reporting to the governing board

This graduated, layered approach ensures HAIS responds proactively to early indicators, engages families early, and escalates supports appropriately to help all students meet academic and attendance goals.

Implementation and Accountability

Corrective actions are implemented by the campus leadership team, supported by instructional coaches, counselors, and HISD specialists. Progress is tracked through bi-weekly data reviews and reported to the governing board and district partners. Adjustments continue until performance stabilizes and targets are met.

Student-Centered Focus

Throughout the corrective process, HAIS prioritizes student impact, ensuring that academic interventions, counseling supports, and college-readiness services are intensified for students most affected by performance gaps.

Through clear triggers, layered interventions, and shared accountability, HAIS ensures that performance challenges are addressed quickly and effectively, protecting student outcomes and sustaining the school's record of high achievement and college success.

Section 3 – Governance, Operating Plan, and Capacity

A strong Operations Plan is coherent overall and aligned internally with the school's mission and vision, Educational Program, and Financial Plan.

Organizational Structure

7. **Provide the following:**

- a. **As Attachment 4, an organizational chart that indicates all positions and lines of authority.**

Attachment 4 included? ☒ YES ☐ NO

- b. **The name(s), title(s), and a description of the daily responsibilities of the person(s) employed by the operating partner that will be responsible for the management of each campus:**

Name	Title	Date Started with Organization	Campus to be Managed	Description of Daily Responsibilities <i>(indicate the person who will be the principal's direct supervisor here)</i>
Melissa Jacobs-Thibaut	Executive Director	2006	Houston Academy for International Studies	Strategic leadership, budget execution, staffing, academic program implementation, compliance with HISD and TEA

- c. **The proposed school's legal status (e.g., non-profit and federal tax exempt) and structure that comply with [TEC 12.101\(a\)](#).**

The Houston Academy for International Studies (HAIS) operates in full compliance with Texas Education Code (TEC) §12.101(a) through a governance and legal structure that ensures the school is supported by a nonprofit, tax-exempt organization dedicated exclusively to public educational purposes.

Friends of the Houston Academy for International Studies is a Texas nonprofit corporation recognized by the Internal Revenue Service as a 501(c)(3) tax-exempt organization. The organization was formed solely to support and advance the mission of HAIS by providing governance, financial oversight, fundraising, and programmatic support in alignment with state law. As a nonprofit public charity, Friends of HAIS has no owners or shareholders, and all revenues and assets are used exclusively for educational purposes consistent with its charter.

The Friends of HAIS Board of Trustees serves as the governing body of the organization, providing fiduciary oversight, policy direction, and accountability in accordance with nonprofit law and TEA charter governance standards. The Board oversees budgeting, financial audits, compliance, and strategic planning, ensuring that the school operates with transparency, integrity, and fiscal responsibility.

This legal and organizational structure fully satisfies the requirements of TEC §12.101(a) by ensuring that the school is governed by a nonprofit entity organized for public educational purposes, with appropriate safeguards for accountability, public stewardship, and the proper use of public and private funds.

Governing Board

8. Provide evidence of the following:

a. The independence of the board as it relates to the authorizer:

The Friends of the Houston Academy for International Studies (501(c)(3)) Board of Trustees is legally and operationally independent from the authorizer and Houston ISD. Board members are not employees of Houston ISD, do not report to district leadership, and are not appointed by the authorizer. The Board operates under its own nonprofit bylaws, conflict-of-interest policy, and fiduciary duties as required by Texas nonprofit law and IRS regulations.

The Board exercises independent authority over:

- Approval of the organization's budget, financial policies, and audits
- Hiring, evaluation, and oversight of the Executive Director (Melissa Jacobs-Thibaut)
- Strategic direction, fundraising, and nonprofit compliance
- Approval of contracts, grants, and major financial commitments

This structure ensures that Friends of HAIS serves as an independent governing body that provides fiduciary and strategic oversight without interference from the authorizer, meeting TEA's standards for charter governance independence.

b. Plans for the board(s) to evaluate the success of the school(s) and school leader(s), including planned frequency of meetings and standing committees:

The Friends of HAIS Board evaluates the success of the school and the Executive Director/Principal through a structured governance and accountability framework aligned to the HAIS mission and the Cycle 9 performance expectations.

Meeting Schedule

- Full Board Meetings: Held at least quarterly
- Finance & Audit Committee: Meets monthly
- Academic & Program Committee: Meets at least quarterly
- Governance Committee: Meets semi-annually

Standing Committees and Their Roles

Committee	What It Evaluates
Finance & Audit Committee	Budget-to-actuals, cash flow, audits, grants, compliance
Academic & Program Committee	STAAR, MAP, SAT, TSI, AP, dual-credit, graduation, associate degree attainment
Governance Committee	Executive Director performance, leadership stability, policy compliance
Development Committee	Fundraising and sustainability

Executive Director & School Evaluation

The Board formally evaluates the Executive Director/Principal annually using a performance framework aligned to:

- Student academic growth and achievement
- College readiness and associate degree outcomes
- Financial stewardship and compliance
- Staff stability and school culture
- Program fidelity to the HAIS mission

Performance data reviewed include:

- STAAR and MAP growth
- Graduation and CCMR rates
- Associate degree and college credit attainment
- Budget, audit, and fundraising reports

This ensures the Board exercises active, data-driven oversight of both school performance and leadership effectiveness.

- c. **As Attachment 5, appropriate bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances that will minimize real or perceived conflicts.**

Attachment 5 included? ☒ YES ☐ NO

- d. **As Attachment 6, a Board Member Information Sheet and resume for each proposed Board Member.**

Attachment 6 included? ☒ YES ☐ NO

- e. **A description of how the proposed governing board members' knowledge and skills make them qualified to oversee a successful charter school, including educational, financial, legal, and community experience and expertise:**

The Friends of the Houston Academy for International Studies (HAIS) Board of Trustees is intentionally composed of leaders whose combined experience provides strong oversight of academic quality, financial stewardship, legal compliance, and community engagement. The board's composition reflects the complexity of operating a high-performing early college charter school and ensures informed, independent governance.

Jennifer Kapral – Strengths: Nonprofit Finance, Education, and Community Leadership

Jennifer Kapral brings more than 20 years of experience spanning K–12 education and nonprofit executive leadership, making her uniquely qualified to provide fiscal and strategic oversight. She has served in senior leadership roles at the Asia Society Texas Center and currently serves as Executive Director of Preservation Houston, where she oversees organizational budgets, fundraising strategies, financial reporting, and long-term sustainability planning. Her experience managing large-scale grants, capital campaigns, and nonprofit financial systems equips the board with strong expertise in budget oversight, internal controls, and financial transparency

Attachment: JKapralResume

In addition to her nonprofit leadership, Ms. Kapral has deep experience in public education, including instructional leadership and early college collaboration with Houston Community College. This dual background allows her to bridge academic priorities with responsible fiscal governance, ensuring that resources are aligned to student outcomes and mission-critical programming.

Dr. Brian Gaston – Strengths: Educational Leadership, Governance, and Performance Management

Dr. Brian Gaston brings nationally recognized expertise in school leadership, system-level governance, and performance management. He holds an Ed.L.D. from Harvard University and has served as a senior leader with New York City Public Schools, where he helped design and implement improvement strategies for priority schools at scale. He is also a former award-winning HISD principal, leading a Title I early college high school to top accountability ratings and National Blue Ribbon School recognition.

Attachment: Gaston, Brian - CV 2025

Dr. Gaston's experience evaluating school leaders, analyzing student performance data, and supporting

turnaround efforts provides the board with deep capacity to evaluate school success, hold leadership accountable, and interpret academic outcomes. His governance experience ensures that the board can engage in high-level strategic oversight without encroaching on daily operations.

Dr. Brenda Rangel – Strengths: School Finance, Compliance, and Charter Governance

Dr. Brenda Rangel brings more than 30 years of experience in K–12 and higher education leadership, with particular strength in school finance, compliance, and organizational systems. She has served as Chief Academic Officer for a Texas charter network, Area School Director for Houston ISD, and currently as Assistant Dean at Rice University’s Center for Education, where she oversees program strategy, budgets, and personnel. Her experience includes managing multimillion-dollar budgets, leading TEA audits, overseeing special populations compliance, and presenting directly to boards of trustees

Attachment: B. Rangel CV 1.8.26

Dr. Rangel’s background ensures that the board has expert capacity in Texas Education Code requirements, charter compliance, audit readiness, and risk management, which are essential for sustaining a successful charter organization.

Collective Board Strength

Together, these three board members provide:

- Educational expertise in early college models, instructional quality, and leadership evaluation
- Financial expertise in nonprofit budgeting, audits, grants, and sustainability
- Legal and compliance expertise grounded in TEA accountability, charter governance, and school finance
- Community expertise through deep ties to Houston’s civic, cultural, and educational institutions

This balanced and complementary skill set ensures that the Friends of HAIS Board of Trustees is well-qualified to provide independent, informed, and effective governance of a high-performing charter school

- f. A plan and timeline for board recruitment (including the desired experience and qualifications of future board members), initial board training, expansion, orientation of new members, and ongoing training for members:**

Friends of the Houston Academy for International Studies maintains a deliberate, phased approach to board recruitment and development to ensure strong governance capacity, continuity, and compliance. The Board operates with three-year staggered terms and will expand from its initial membership to a five-member board within the first three years of operation.

Board Composition and Desired Expertise

As the Board expands, new members will be selected to complement existing expertise and meet the governance needs of a high-performing early college charter school. Desired qualifications include experience in:

- Public education or higher education, including early college or postsecondary partnerships
- Nonprofit or public-sector finance, budgeting, auditing, or grant management
- Legal, compliance, or risk management, preferably with knowledge of Texas nonprofit or education law
- Workforce, industry, or civic leadership, supporting internships, mentoring, and community partnerships
- Equity-focused community leadership, with strong ties to Houston's underserved communities

All prospective board members must demonstrate commitment to the HAIS mission, independence from the authorizer, and willingness to fulfill fiduciary duties.

Recruitment and Expansion Timeline

Year 1: Stabilization and Capacity Building

- Maintain the founding three board members for continuity and institutional knowledge
- Conduct a board skills and needs assessment to identify gaps
- Establish standing committees (Finance & Audit, Academic & Program, Governance)
- Begin identification and vetting of prospective board candidates

Year 2: Strategic Expansion

- Recruit and seat one additional board member aligned to identified skill gaps
- Provide full onboarding and committee placement
- Continue targeted recruitment for a fifth board member

Year 3: Full Board Implementation

- Recruit and seat the fifth board member
- Review board structure, committee effectiveness, and succession planning
- Begin staggered term planning to ensure continuity beyond Year 3

Initial Board Training and Orientation

All board members—new and existing—will participate in structured training to ensure compliance and effectiveness.

Initial Training (Within First 90 Days of Service)

Training will include:

- TASB Governance Training, Lone Star Governance or Region IV Education Service Center charter governance training
- Overview of Texas Education Code, charter authorizer expectations, and fiduciary responsibilities
- Review of HAIS’s mission, early college model, and accountability systems
- Training on financial oversight, audits, and internal controls

Board Orientation

New members receive a comprehensive orientation packet and briefing that includes:

- Bylaws, Code of Ethics, and Conflict of Interest policies
- Board committee structure and calendar
- Academic performance metrics and early college outcomes
- Budget, audit, and fundraising overview

Orientation sessions are led by the Board Chair and Executive Director.

Ongoing Board Training and Development

To ensure continuous improvement, the Board commits to ongoing professional development:

- Annual governance refresher training through TASB or Region IV
- Regular updates on charter law, accountability, and compliance changes
- Data literacy sessions focused on academic and financial dashboards
- Periodic self-assessments of board effectiveness

Each board member is expected to complete at least one governance or leadership training annually.

Evaluation and Continuous Improvement

The Governance Committee will:

- Conduct an annual board self-evaluation
- Monitor attendance, engagement, and committee effectiveness
- Recommend adjustments to recruitment priorities and training plans

Together, these structures ensure that Friends of H AIS maintains a qualified, well-trained, and mission-aligned governing board capable of overseeing a successful charter school.

Board Growth and Succession Plan

The Friends of H AIS Board of Trustees operates with staggered three-year terms to ensure continuity and institutional knowledge. The Board will expand intentionally from three to five members over the first three years of implementation:

- **Year 1:** Three members representing education leadership, nonprofit finance, and compliance
- **Year 2:** Addition of a members with community, workforce, or legal experience
- **Year 3:** Addition of a member with legal, audit, or risk-management expertise

This planned expansion ensures the Board maintains sufficient capacity to oversee academic performance, financial sustainability, and regulatory compliance as the school grows.

g. Sufficient capacity within and/or an appropriate relationship to any pre-existing non-profit board:

Board Capacity and Relationship to a Pre-Existing Nonprofit Board

The Friends of the Houston Academy for International Studies (H AIS) Board of Trustees has sufficient capacity to govern and oversee the proposed school independently while also maintaining an appropriate and effective relationship to the pre-existing nonprofit organization that supports the school. Friends of H AIS is a legally established 501(c)(3) nonprofit organization created specifically to support the mission, sustainability, and long-term success of H AIS.

The Board is composed of members with demonstrated expertise in education leadership, nonprofit finance, charter governance, compliance, and community engagement, ensuring the capacity to fulfill fiduciary, strategic, and oversight responsibilities without reliance on external entities. Board members collectively possess experience managing budgets, overseeing audits, evaluating school leaders, and monitoring academic outcomes, which provides the internal capacity required for effective charter governance.

The relationship between Friends of H AIS and any affiliated or supporting nonprofit entities is clearly defined and arms-length, with no overlapping governance that would compromise independence or

accountability. Friends of HAIS maintains its own bylaws, board committees, financial controls, and audit processes. Any coordination with partner organizations or support entities occurs through formal agreements and transparent reporting, ensuring that governance authority remains solely with the Friends of HAIS Board.

This structure allows the Board to leverage community partnerships and philanthropic support while maintaining clear lines of authority, independence, and accountability, fully meeting Cycle 9 expectations for governing board capacity and nonprofit relationships.

Application Team Capacity

9. Provide the following:

- a. Describe the collective qualifications of the applicant team to implement the school design successfully, including each team member's experience and evidence of measurable success in:
 - School leadership, administration, and governance
 - Implementing systems for curriculum, instruction, and assessment
 - Performance management

School Leadership, Instructional Capacity, and Governance Oversight

Name / Role	School Leadership, Administration & Governance	Curriculum, Instruction & Assessment Systems	Performance Management & Measurable Success
Melissa Jacobs-Thibaut Principal / Executive Director	Founding principal; 20+ years as a principal; authored original HAIS charter; National Blue Ribbon School leader; TEA A-rated campus	Designed and implemented early college model aligned to TEKS, College Board, and HCC	High associate-degree attainment; high college-going and persistence rates
Charles Kaspari Assistant Principal	Campus operations, discipline systems, compliance, and accountability leadership	Instructional implementation oversight; walkthroughs and coaching	Attendance, behavior, and operational performance monitoring
Adelisse Gomez Assistant Principal	Student services leadership; attendance, graduation, and persistence systems	Monitoring instructional supports and targeted interventions	Credit completion, graduation tracking, and student persistence

Sarah Yockey Assistant Principal	Instructional leadership and teacher development	PLC leadership; curriculum alignment; interim and formative assessment analysis	Improved STAAR, AP, and interim assessment outcomes
Ariana Salinas Counselor	Student advising and postsecondary planning leadership	College readiness systems (TSI, SAT, dual credit monitoring)	Improved college enrollment, readiness, and persistence
Erica Alderete Magnet Coordinator	Enrollment management, compliance, and program governance	Program fidelity monitoring and data reporting	Stable enrollment, equity, and accountability compliance
Jennifer Kapral Board Member	Nonprofit executive leadership; board finance oversight; governance experience with Asia Society Texas and Preservation Houston	Ensures fiscal alignment to academic priorities	Budget oversight, audits, financial sustainability
Dr. Brian Gaston Board Member	Former award-winning principal; district-level leadership; charter and public-school governance experience	Evaluates instructional systems and early college outcomes	Data-driven evaluation of school and leader performance
Dr. Brenda Rangel Board Member	Former HISD Area Superintendent; charter network executive; higher-education administrator	Oversight of academic compliance and special populations	TEA compliance, audit readiness, risk management

- b. As Attachment 7, include the résumés and bios for all members of the applicant team.**

Attachment 7 included? ☒ YES ☐ NO

- c. Describe the proposed School Leader’s experience in and ability to design, launch, and lead a school and implement the specific educational program being proposed, OR describe the board’s plan to recruit and retain a leader with the ability to implement the specific educational program being proposed (*if School Leader candidate(s) is not yet identified*):**

Proposed School Leader: Melissa Jacobs-Thibaut

Melissa Jacobs-Thibaut brings more than 25 years of experience as an educator and instructional leader and over 20 years as a principal designing, launching, and leading innovative, high-performing schools.

She is the founding principal of the Houston Academy for International Studies (HAIS) and authored the school's original Internal Charter, opening HAIS in 2006 with a clear vision of an early college, globally focused high school designed to expand opportunity for Houston's underserved students.

Before her principalship, Ms. Jacobs-Thibaut served as a Teach for America teacher, Peace Corps Trainer, and Instructional Coordinator, building deep expertise in curriculum design, adult learning, and cross-cultural education. She also played a key role in the design and implementation of the Asia Society International Studies Schools Network (ISSN) Design Rubric, contributing to a nationally recognized framework for globally focused, college-ready schools. Under her leadership, HAIS became an ISSN-affiliated school and earned national and international recognition for its academic rigor, global focus, and student outcomes.

Ms. Jacobs-Thibaut's leadership has resulted in sustained excellence. HAIS has earned Texas Education Agency A ratings and National Blue Ribbon School recognition, reflecting high levels of academic achievement, strong school culture, and effective instructional systems. The school consistently posts exceptional college-going rates and associate degree attainment, demonstrating her ability to successfully implement and sustain a complex early college model that integrates TEKS-aligned instruction, College Board curriculum, and Houston Community College coursework.

Her leadership has been recognized through numerous prestigious honors, including the Terrel H. Bell Outstanding Leadership Award, designation as a Fulbright Leadership for Global Schools Scholar, Houston ISD Principal of the Year, and completion of leadership programs through the Harvard Summer Institute and Rice University Educators' Entrepreneurship Program (REEP). These distinctions reflect both her national standing as an educational leader and her commitment to continuous improvement and innovation.

Taken together, Ms. Jacobs-Thibaut's deep experience, proven results, and national leadership in early college and international studies education provide strong evidence that she has the capacity to design, launch, and lead the proposed Cycle 9 school model with fidelity, excellence, and lasting impact for Houston's students.

d. Describe the work of the school leader(s), including:

- **the measurable performance expectations for the school leader that are aligned to the mission of the school**
- **how these expectations will shift from school launch in the first year of operation to sustainability in future years**

Measurable Performance Expectations for the School Leader

The performance expectations for the School Leader are explicitly aligned to the HAIS mission of preparing Houston's underserved students for college success, career readiness, and global citizenship through a rigorous early-college, international studies model. These expectations are monitored through HISD evaluation systems, campus accountability measures, and governing-board oversight.

Year 1: School Launch and Stabilization

In the first year of implementation, the School Leader's performance is measured by the successful establishment of the school model and the foundational systems that ensure long-term success.

Key performance expectations include:

- Successful launch of the early college model, including student enrollment, staffing, and scheduling aligned to HCC dual-credit and College Board programming
- Instructional coherence, demonstrated through TEKS-aligned curriculum, College Board implementation, and effective use of HCC college coursework
- Positive school culture, including strong attendance ($\geq 94\%$), low disciplinary incidents, and full implementation of Advocacy and PLC systems
- Baseline academic growth, as measured by teacher data, MAP BOY–EOY growth and TEA Interim STAAR projections
- Compliance and operations, including HISD accountability, special populations services, and data systems

The principal is evaluated on building the infrastructure that allows teaching, learning, and student supports to function with consistency and quality.

Years 2–3: Program Effectiveness and Academic Acceleration

Once the school is fully operational, performance expectations shift to student outcomes and instructional effectiveness.

Key expectations include:

- STAAR EOC performance at or above state averages with measurable year-to-year growth
- MAP growth for at least 60% of students meeting or exceeding expected growth
- High CCMR indicators, including SAT, TSI, AP, and dual-credit success
- Strong graduation and credit-completion rates ($\geq 90\%$)
- Increased college credit accumulation and associate-degree progress

The principal is evaluated on whether systems produce measurable improvement in student learning and postsecondary readiness.

Years 4 and Beyond: Sustainability and Excellence

As the school matures, expectations shift to sustained excellence, equity, and scale.

Key performance indicators include:

- TEA A-rating or equivalent accountability standing
- High associate-degree attainment ($\geq 50\%$ of graduates)
- College-going and persistence rates exceeding district and state averages
- Strong staff retention and instructional quality
- Stable enrollment and financial sustainability

The school leader is evaluated on the ability to maintain excellence, close opportunity gaps, and ensure the model remains strong over time. The Board evaluates school and leadership performance through a quarterly performance dashboard that includes academic outcomes, financial health, enrollment stability, and compliance indicators. Data reviewed include STAAR and MAP performance, graduation and CCMR rates, budget-to-actual financial reports, audit status, and staff retention.

The Executive Director/Principal is formally evaluated annually using these indicators to ensure alignment with the school's mission and performance expectations.

Alignment to HAIS's Mission

Across all phases, the School Leader's performance is measured by how well the school fulfills its mission:

- Expanding college access
- Ensuring academic rigor
- Promoting equity for underserved students
- Producing graduates who are college-ready, career-ready, and globally competent

This progression from launch → growth → sustainability ensures that leadership expectations remain mission-driven, data-based, and focused on long-term student success

Staffing Plans

10. Provide the following:

- a. **As Attachment 8, a recruitment and hiring strategy for all campus roles, including:**

- selection criteria that demonstrate high standards and mission alignment for all candidates
- a hiring protocol, and timeline that ensure the school is fully staffed by July 1 of each year.

Attachment 8 included? ☒ YES ☐ NO

b. As Attachment 9, a plan to develop staff and retain high-performing staff, including:

- an induction program that will prepare teachers to deliver any unique or particularly challenging aspects of the educational program
- evaluation tools and processes that will capture trends and track and promote teacher progress over time
- The process for providing targeted and personalized support for school staff that includes:
 - The allocation of resources to support and provide professional development
 - The qualifications of personnel to provide professional development and facilitate adult learning
- Professional development methods and calendar

Attachment 9 included? ☒ YES ☐ NO

c. Describe your process for identifying and remedying unsatisfactory leadership and/or teacher performance:

Houston Academy for International Studies (HAIS) implements a clear, consistent, and data-driven process for identifying and addressing unsatisfactory leadership and teacher performance aligned to Texas Education Code and the school's early college mission.

Teacher and leadership performance is monitored through formal observations, walkthroughs, student achievement data. Administrators use approved appraisal systems, including TTESS and principal evaluation frameworks, to provide regular feedback based on classroom practice, instructional planning, and student outcomes. In addition, data from STAAR, MAP growth, interim assessments, course pass rates, and college-readiness indicators are reviewed to identify patterns that may indicate performance concerns.

When performance falls below expectations, HAIS initiates a tiered support and accountability process. First, the administrator provides targeted feedback, coaching, and professional development aligned to identified areas of need. If improvement is not demonstrated, a formal growth plan is implemented with clear goals, timelines, and monitoring checkpoints. Support may include instructional coaching, mentoring, modeling, and additional professional learning.

If performance remains unsatisfactory after documented support, HAIS follows progressive discipline and improvement procedures, which may include intensified supervision, reassignment, or other personnel actions in accordance with district policy and due process protections. In the event that performance expectations are not met, the Board Chair, in consultation with the Governance Committee, initiates a formal improvement plan that includes clear goals, timelines, and monitoring checkpoints. The Board retains final authority over corrective actions and leadership accountability.

This approach ensures that educators are supported to improve while maintaining accountability for high-quality instruction and leadership necessary to serve HAIS students effectively.

Facilities

11. **Provide the following:**

- a. **Identification of an appropriate proposed school facility OR a plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility that will meet the requirements of the educational program and anticipated student population:**

HAIS will remain located in its current facility at 1810 Stuart Street, 77004 and HISD will handle all facility needs.

Section 4 – Financial Plan

A strong Financial Plan is coherent overall and aligned internally with the school’s mission and vision, Educational Program, and Organization Plan.

Financial Plan

12. Provide the following:

- a. The staff members responsible for the organization’s finance and a brief description of their qualifications to manage the organization’s systems, policies, and processes:**

The HAIS budget is intentionally aligned to the instructional model. Staffing allocations prioritize early college and College Board coursework; student support funding sustains advisories, counseling, and mentoring; and professional development resources support College Board training, Houston Community College alignment, and instructional coaching.

Houston Academy for International Studies (HAIS) maintains strong fiscal oversight through a governance and management structure that combines campus-level leadership with nonprofit board oversight and financial expertise. Financial oversight is strengthened by Board expertise in nonprofit budgeting, audits, IRS compliance, and restricted fund management, ensuring strong internal controls and fiscal accountability.

Melissa Jacobs-Thibaut, Principal/Executive Director

As founding principal of HAIS, Melissa Jacobs-Thibaut has more than 20 years of experience managing school budgets, staffing allocations, grants, and compliance requirements. She is responsible for developing and monitoring the campus budget, aligning financial resources to the school’s instructional priorities, and ensuring that expenditures support HAIS’s early college and international studies mission. Her experience operating a complex dual-credit program in partnership with Houston Community College demonstrates her ability to manage multi-funding streams while maintaining fiscal discipline and instructional quality.

Jennifer Kapral, Friends of HAIS Board Member

Jennifer Kapral brings extensive experience in nonprofit financial management, governance, and organizational sustainability. She has held leadership roles with organizations including Asia Society Texas Center and Preservation Houston, where she oversaw budgeting, financial reporting, fundraising alignment, and compliance with nonprofit accounting and audit standards. As a Friends of HAIS board member, Ms. Kapral provides independent financial oversight, supports budget planning, and ensures that fiscal policies, internal controls, and reporting practices meet best practices for nonprofit governance.

Together, Ms. Jacobs-Thibaut and Ms. Kapral provide a strong system of financial leadership and oversight, ensuring that HAIS’s systems, policies, and processes are transparent, compliant, and strategically aligned to support the school’s long-term sustainability and student success.

In addition the Houston Independent School District provides the following positions and systems:

Controller's Office:

Controller oversees all financial operations for a school district/entity, including G/L, AP, AR, grant management, financial reporting, ensuring GASB/GAAP compliance, managing audits, and providing financial leadership to the CFO and executive team, with a strong emphasis on Texas-specific grant rules and state reporting.

Assistant Controller manages daily accounting, ensures accurate books via reconciliations, prepares draft financial statements (monthly/annual), assists with audits, oversees internal controls, and supervises junior staff, focusing on GAAP/GASB compliance, timely closing, and financial reporting for districts/entities.

Director of Special Revenue manages complex grant accounting (local, state, federal), ensuring compliance with GAAP and grantor rules, handling expenditure reports, Single Audits, ACFR prep, and oversees a team, focusing on financial integrity for non-primary funds like grants, facility rentals, and investments, requiring strong analytical skills and knowledge of TEA regs

Director of Capital Projects manages the entire lifecycle of school district construction/renovation projects, from planning & budgeting (bond funds) to design, bidding, construction oversight, contract admin, and compliance (TEA, state laws), ensuring projects meet strategic goals, stay on track, and provide value

Director of Accounting oversees all district accounting operations, ensuring compliance with TEA/GAAP, managing general ledger, bank reconciliations, internal controls, financial reporting (like PIEMS), bond/capital funds, and supporting budgeting/audits, requiring deep expertise in Texas school finance and governmental accounting.

Director of Enterprise Accounting provides strategic leadership and operational oversight for all enterprise funds, including Food Services and Medicaid, ensuring compliance with federal and state law, State Board of Education rules, and local board policy.

Director of Accounts Payable involves leading the AP department for HISD, ensuring timely and accurate processing of invoices, payments (checks, ACH, reimbursements), and managing vendor relations, all while implementing strong internal controls, driving process automation, ensuring compliance, and supporting financial reporting and audits, aligning with district goals and best practices in Texas public education finance

Director of Capital Assets leads the district's asset management, ensuring compliance with state/federal rules (like GASB & TEA), managing inventory systems, overseeing acquisition/disposal, training staff, and providing financial reporting on capital assets for effective resource stewardship, balancing financial accountability with operational needs for schools/districts.

b. A description of the organization's systems, policies, and processes for:

- **Financial planning**
- **Accounting**
- **Purchasing**

- **Payroll**

HAIS uses HISD's purchasing, payroll, accounting, and reporting systems, which include built-in internal controls, audit trails, and compliance checks. This structure provides a strong system of checks and balances, ensuring that all funds are managed responsibly, expenditures are properly approved, and financial reporting is accurate and timely. Together, campus leadership, nonprofit board oversight, and HISD financial systems ensure that HAIS meets all expectations for fiscal integrity and sustainability.

c. A description of the organization's internal controls, financial reporting requirements, and process for conducting independent annual financial and administrative audits

Friends of HAIS, the 501(c)(3) nonprofit organization that supports the Houston Academy for International Studies, maintains strong internal controls and financial oversight systems designed to ensure fiscal integrity, transparency, and compliance with state and federal nonprofit regulations.

Financial oversight is strengthened by Board expertise in nonprofit budgeting, audits, IRS compliance, and restricted fund management, ensuring strong internal controls and fiscal accountability.

Internal Controls

Friends of HAIS operates under board-approved financial policies and procedures that include separation of duties, authorization controls, and documented approval processes. Key internal controls include:

- Segregation of financial responsibilities among staff and board officers for budgeting, payment approval, check signing, and reconciliation
- Board oversight of financial activity, including review and approval of the annual budget and major expenditures
- Use of secure accounting systems to track revenues, expenses, and restricted funds
- Two-signature or board-approved authorization requirements for disbursements above established thresholds
- Monthly bank and account reconciliations reviewed by a board-designated officer

These controls reduce the risk of error or misuse of funds and ensure that all transactions are properly documented and approved.

Financial Reporting Requirements

Friends of HAIS produces regular financial reports for board review, including:

- Monthly financial statements (income statement and balance sheet)
- Budget-to-actual reports to monitor spending and identify variances

- Grant and restricted fund reports to ensure compliance with donor and program requirements

These reports are reviewed by the Finance Committee and full Board of Directors, ensuring ongoing fiscal monitoring and informed decision-making.

Independent Annual Financial and Administrative Audits

Friends of HAIS plans to engage an independent, licensed Certified Public Accountant (CPA) to conduct an annual financial and administrative audit in accordance with generally accepted auditing standards. The audit includes:

- Review of internal controls and financial processes
- Verification of revenues, expenses, and fund balances
- Compliance with nonprofit accounting standards and IRS requirements
- Assessment of financial management and administrative practices

The audit findings are presented to the Board, and any recommendations for improvement are formally reviewed and acted upon. The organization also files all required IRS Form 990 and other regulatory reports in a timely manner.

Through strong internal controls, regular financial reporting, and independent annual audits, Friends of HAIS ensures responsible stewardship of funds and maintains the financial integrity required to support the mission and long-term sustainability of Houston Academy for International Studies.

d. The roles and responsibilities among the administration and governing board regarding school finance:

Houston Academy for International Studies (HAIS) and its supporting nonprofit, Friends of the Houston Academy for International Studies (Friends of HAIS), maintain a clear separation of duties between the Governing Board and School Administration to ensure strong financial stewardship, transparency, and compliance with TEA and nonprofit requirements.

Within the administration and governing board, specific roles and responsibilities are established to ensure effective management of school finance. The Board holds the authority to approve and adopt the district budget, participate in financial planning, and oversee fiscal policy to maintain accountability. The campus leader Superintendent spearheads the preparation of the annual budget, coordinating with the Budget Department to align financial planning with district activities and legal requirements. Administration is tasked with implementing payroll procedures, monitoring accurate time and absence reporting, and ensuring compliance with established guidelines. Additionally, the Purchasing Services Department manages procurement processes and works collaboratively with campuses and departments to ensure that district funds are expended according to applicable laws and regulations. This division of responsibilities creates a system of checks and balances, promoting transparency and efficiency in the school's financial operations.

Governing Board (Friends of HAIS Board of Trustees)

Role: Oversight, Policy, and Accountability

The Board is responsible for governing the financial health of the organization and ensuring long-term sustainability. Board responsibilities include:

- Approving the annual operating and programmatic budget
- Establishing and approving financial policies and internal controls
- Overseeing audits, IRS filings (Form 990), and financial transparency
- Monitoring financial performance through regular financial reports
- Ensuring compliance with state, federal, and nonprofit financial requirements
- Approving major contracts, grants, and expenditures above established thresholds
- Evaluating the Executive Director's financial stewardship

The Board does not engage in daily financial transactions or operational spending decisions.

Finance & Audit Committee (Board)

Role: Detailed Financial Review and Risk Management

The Finance & Audit Committee supports the full Board by:

- Reviewing monthly financial statements and budget-to-actual reports
- Monitoring cash flow, reserves, and fiscal risks
- Overseeing the independent annual audit
- Recommending financial actions or adjustments to the full Board
- Ensuring implementation of internal controls and corrective actions

School Administration (Executive Director/Principal and Leadership Team)

Role: Implementation, Management, and Reporting

School administration is responsible for executing the approved budget and managing day-to-day financial operations, including:

- Developing the proposed annual budget for Board review

- Managing payroll, purchasing, and program expenditures
- Ensuring proper documentation and compliance with spending policies
- Monitoring expenditures and adjusting operations as needed
- Preparing and presenting financial reports to the Board
- Coordinating with auditors and responding to audit findings

Administration does not approve its own budget or audit results.

By clearly defining financial roles, HAIS ensures responsible stewardship of public and private funds while supporting instructional excellence and long-term sustainability.

e. How the organization ensures financial transparency, including:

- **plans for public adoption of the school's budget**
- **public dissemination of its annual audit and an annual report**

Financial Transparency and Public Accountability

Friends of HAIS is committed to maintaining full financial transparency and public accountability in support of the Houston Academy for International Studies. The organization ensures that stakeholders—including families, community members, donors, and authorizing entities—have access to clear, accurate information about how funds are raised and used.

Public Adoption of the Budget

Each year, the Friends of HAIS Board of Directors reviews and formally adopts the organization's annual budget in a publicly noticed board meeting. The approved budget reflects the organization's strategic priorities, fundraising goals, and planned expenditures in support of HAIS programming. Once adopted, the budget is made available to the public through the organization's website and upon request, ensuring transparency in financial planning and resource allocation.

Public Dissemination of Annual Audit and Annual Report

Friends of HAIS conducts an independent annual financial and administrative audit performed by a licensed CPA. The completed audit is reviewed and approved by the Board of Directors and then made publicly available through the organization's website and by request.

In addition, Friends of HAIS publishes an annual report that summarizes the organization's financial position, fundraising activities, programmatic investments, and impact on students and the school community. This report is shared with families, partners, donors, and the broader community, providing a clear and accessible picture of how funds are used to support student success.

Through public budget adoption, independent auditing, and transparent reporting, Friends of HAIS ensures responsible stewardship of resources and meets Cycle 9 expectations for fiscal transparency and accountability.

e. As *Attachment 10*, an operating budget and narrative that explains revenue and cost assumptions, including:

- grant/fundraising assumptions
- the amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable)
- the projected cost to implement the academic model described in this application

Attachment 10 included? ☒ YES ☐ NO

f. Describe the organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated:

Houston Academy for International Studies (HAIS) maintains a conservative, proactive contingency plan to ensure financial stability if anticipated revenues are not received or are lower than projected. The school's budget is built on conservative enrollment and funding assumptions and is aligned to current Houston ISD allotments, ensuring that core academic and student support functions can be sustained even under reduced funding scenarios.

If revenues decline, HAIS will implement a tiered cost-adjustment strategy that prioritizes instructional continuity and student outcomes. First, discretionary and non-essential expenditures, including contracted services, travel, and non-instructional program costs, would be reduced or deferred. Second, the school would adjust staffing models to preserve core instruction by leveraging its partnership with Houston City College (HCC) to provide college-level courses through HCC faculty rather than campus-funded staff. This approach allows HAIS to continue offering dual-credit and associate-degree pathways while controlling personnel costs. If enrollment or funding falls below projections by more than **5%**, HAIS will reduce discretionary expenditures and increase reliance on Houston City College-provided faculty for college coursework to maintain program continuity while preserving fiscal stability.

In addition, HAIS would use its strong enrollment demand, historically stable attendance, and established grant and partnership relationships to stabilize revenues. Campus leadership and Houston ISD financial teams would conduct monthly budget reviews to monitor cash flow, adjust expenditures, and ensure continued compliance with district and state financial requirements. Through conservative planning, flexible staffing, and strategic use of its HCC partnership, HAIS is well-positioned to maintain fiscal stability and protect the integrity of its early college academic model under varying funding conditions.

Section 5 – Existing Partner/Experienced Partner Supplement

N/A Friends of HAIS is NOT an Existing Partner

A strong proposal from a partner that has previously operated schools (including partners that operate under a Charter Management Organization or CMO), or a partner proposing to contract with an entity that has previously operated schools (often referred to as an Education Service Provider or ESP), is coherent overall and aligned internally with the school's mission and vision, Educational Program, Operational Plan, Financial Plan, and any other applicable attachments.

- *Existing Partners (any organization that has previously operated schools) should complete only Question 13*
- *Any applicant proposing to contract with an Education Service Provider (ESP) or CMO (Charter Management Organization) should complete Questions 14 and 15*

Existing Partner Track Record

1. Provide the following:

- a. As *Supplemental Attachment 1*, the experienced partner applicant, CMO, or ESP's success in serving populations similar to the population that the applicant intends to serve, including evidence of academic success and successful management of non-academic school functions (e.g., back-office services, school operations, extracurricular programs)

Supplemental Attachment 1 included? ☐ YES ☐ NO

- b. As *Supplemental Attachment 2*, an independent financial audit report and its most recent annual report of the experienced partner applicant, CMO, or ESP that demonstrated the financial health of the organization.

Supplemental Attachment 2 included? ☐ YES ☐ NO

- c. A description of any history of charter revocations, non-renewals, withdrawals, or failures to open for the experienced partner applicant, CMO, or ESP:

Click or tap here to enter text.

- d. If applying to manage a turnaround campus, evidence that:

- the partner organization has been in existence for at least three years prior to the undertaking of the management of the district campus
- the partner organization has managed multiple campuses for multiple years
- the partner organization has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses

Click or tap here to enter text.

ESP or CMO Management Plan and Legal Relationship

2. Provide the following:

a. The name and address of the ESP or CMO:

Click or tap here to enter text.

b. As *Supplemental Attachment 3*, the Management Agreement between the ESP and the applicant organization that includes:

- ü A detailed description of the roles and responsibilities of the ESP
- ü A detailed explanation of the scope of services and costs of all resources to be provided by the ESP
- ü A detailed description of the oversight and evaluation methods that the board will use to oversee the ESP, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP's progress toward achieving agreed-upon goals
- ü A detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory
- ü A detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP and the schedule on which the ESP will receive compensation
- ü A detailed explanation of the financial responsibilities of the ESP, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP can make without obtaining board approval, and what reports ESP submit to the board on financial performance and on what schedule
- ü A detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed
- ü A detailed description of the grounds for which the ESP or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause
- ü An explanation and justification of any indemnification provisions in the event of default or breach by either party

Supplemental Attachment 3 included? ☐ YES ☐ NO

c. An enforceable plan for the operation of the school in the case that the management agreement is terminated:

Click or tap here to enter text.

d. Assurance and evidence that the board is independent from the ESP or CMO and is self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed

ESP or any affiliated business entities

Click or tap here to enter text.

e. A clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP supervisory responsibilities:

Click or tap here to enter text.

f. A detailed explanation and compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement. Such agreements must be consistent with the school's authority to terminate the ESP/CMO agreement and continue operation of the school:

Click or tap here to enter text.

g. A detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused:

Click or tap here to enter text.

HAIS Attachment 1 Graduation Standards

HAIS Follows HISD TEA Aligned Graduation Standard for High School Graduation and aligns Dual Credit Courses to the Houston City College Degree plan for Associate's Degree.

HISD Resources:

- **HISD Graduation Requirements (district site):**

<https://www.houstonisd.org/families-students/student-requirements-expectations/graduation-requirements>

- **HB5 Graduation Requirements Flyer (HISD):**

https://tx01001591.schoolwires.net/cms/lib2/TX01001591/Centricity/Domain/56622/HB-5_Graduation-Requirements_Flyer_ENG.pdf

TEA Resource:

- **Full Texas Administrative Code (TAC) Graduation Requirements PDF:**

<https://tea.texas.gov/about-tea/laws-and-rules/sboe-rules-tac/sboe-tac-currently-in-effect/ch074b.pdf>

Attachment 1: High School Graduation and Exit Standards



Houston Academy for International Studies

High School Graduation Requirements & Exit Standards

Houston Academy for International Studies (HAIS) is an Early College High School designed to ensure that all students graduate college-ready, career-ready, and globally competent. HAIS students complete the Distinguished Level of Achievement graduation plan while simultaneously earning college credit and progressing toward an Associate Degree through Houston Community College (HCC).

The HAIS graduation requirements and exit standards reflect:

- Texas Education Code and TEA graduation requirements
- Houston ISD graduation policies
- The Early College High School model
- The Asia Society International Studies Schools Network (ISSN) Graduate Profile

Graduation Requirements

All HAIS graduates must:

- Complete 26 Texas high school credits aligned to the Distinguished Level of Achievement
- Earn at least one endorsement
- Meet all STAAR End-of-Course (EOC) requirements
- Meet College, Career, and Military Readiness (CCMR) indicators
- Complete FAFSA or TASFA (unless exempt for good cause)
- Successfully complete aligned HCC dual-credit coursework toward an Associate Degree

As part of our programming to for Global Citizenship, students also

- Study 4 years of a Language other than English
- Present a reflection Portfolio aligned to the Global Graduate Profile in grades 9 and 10

Attachment 1: High School Graduation and Exit Standards

- Complete and present a Community Project based on UN Millennium Goals in the 11th Grade
- Complete an internship in the 12th Grade

HAIS Graduation Credit Requirements

Distinguished Level of Achievement

Foundation Area

English Language Arts	4 credits (English I–IV, including Pre-AP/AP/Dual Credit)
Mathematics	4 credits (Algebra I, Geometry, Algebra II, plus upper-level math)
Science	4 credits (Biology, Chemistry, Physics, plus advanced science)
Social Studies	4 credits (World Geography/AP Human Geography, World History/AP World History, U.S. History/AP or Dual Credit, Government & Economics)
Languages Other Than English	2 credits
Physical Education	1 credit
Fine Arts	1 credit
Health	0.5 credit
Electives	5.5 credits
Total Credits	26 credits

Endorsements at HAIS

HAIS students most commonly earn the following endorsements, aligned to their academic and early college pathways:

Multidisciplinary Studies

- Four advanced courses across core subject areas
- AP and dual-credit coursework aligned to HCC pathways

Arts & Humanities

- Advanced coursework in Social Studies and English
- Languages Other Than English
- Research, humanities, and international studies electives

STEM (as applicable)

Requires Algebra II, Chemistry, and Physics, with:

- Advanced mathematics/science or approved STEM-aligned CTE coursework
-

Grade-Level Course and Early College Progression

HAIS implements a clearly defined grade-level scope and sequence aligned to high school graduation and HCC degree completion. Below is a Comprehensive sequence of courses blending high school and College Courses:

Houston Academy for International Studies
Associates of Arts / Science
Coherent Sequence of Courses

TENTATIVE FRESHMAN SCHEDULE		
	1st Semester	2nd Semester
1	English I A PreAP	English I B PreAP
2	Algebra I A PreAP	Algebra I B PreAP
	Algebra II A PreAP	MATH 1314
3	Biology A PreAP	Biology B PreAP
4	AP Human Geography A	AP Human Geography B
5	Principles of Government A	Principles of Government B
6	LOTE	LOTE
7	EDUC 1300	SPCH 1311
8	PE / Strategic Math	PE / Strategic Math

TENTATIVE SOPHOMORE SCHEDULE		
	1st Semester	2nd Semester
1	English II A PreAP	English II B PreAP
2	Algebra II A PreAP	Algebra II PreAP / DCH - MATH 1314
3	Chemistry A PreAP	Chemistry B PreAP
4	AP World History A	AP World History B
5	CTE Course	CTE Course
6	LOTE	LOTE
7	PE	Health - KINE 1304
8	Creative Arts A	Creative Arts B

TENTATIVE JUNIOR SCHEDULE		
	1st Semester	2nd Semester
1	ENGL 1301	ENGL 1302
2	Geometry A PreAP	Geometry B PreAP
3	Physics A OnRamps	Physics B OnRamps
4	HIST 1301	HIST 1302
5	Business English A	Business English B
6	LOTE	LOTE
7	GOVT 2305	ECON 2301
8	CTE Course	CTE Course

TENTATIVE SENIOR SCHEDULE		
	1st Semester	2nd Semester
1	ENGL 2322	ENGL 2323
2	Adv Math A	Adv Math B
3	HCC Science 1	HCC Science 2
4	LOTE	LOTE
5	Practicum in Entrepreneurship A	Practicum in Entrepreneurship B
6	Project Based Capstone A	Project Based Capstone A
7	GOVT 2306	HCC Elective
8	HCC Elective	HCC Elective

Schedules are individualized and may include double-blocked literacy or math supports based on student need. 9th Grade Principles of Government is a Level 1 CTE Course.

College Degree Planning

Every student receives comprehensive academic advising at HAIS and HCC to complete the associate degree within the 4 years of High School. Below is the document used to guide the HCC associate degree planning.

STUDENT NAME: _____

Associate of Arts
Associate of Science

- ☐ TSI Reading
☐ TSI Writing
☐ TSI Math

HAIS HCC Academic Degree Checklist

Academic Core (42 Hours)	Other Required Courses (18 Hours)
Communication..... 6 hours ☐ ENGL 1301 DCH: English 3A DCH-11 th GR/English 4A DCH-12 th GR ☐ ENGL 1302 DCH: English 3B DCH-11 th GR/English 4B DCH-12 th GR	Associate of Arts College-Level Electives..... 18 hours ☐ SPCH 1311 DCH = Pub Speaking ☐ Creative Art: _____ ☐ ENGL 2323 DCH = English 4B DCH ☐ MATH _____ (DCH = Advanced Math) ☐ LOTE _____ ☐ LOTE _____ ☐ LOTE _____ ☐ Other: _____ ☐ Other: _____ ☐ Other: _____
Language, Philosophy and Culture..... 3 hours ☐ ENGL 2322 DCH: English 4A DCH-12 th GR	
Mathematics..... 3 hours ☐ MATH 1314, 1324, 1332 DCH: ALG 2B - DCH/1314 DCH A	
Life and Physical Sciences..... 6 hours ☐ 1 st Science: _____ ☐ 2 nd Science: _____ BIOL 1306/1106, 1407, 1322, 2301/2101, 2302/2102; CHEM 1311/1111, 1412; PHYS 1401, 1402; GEOL 1403 ANTH 2301; ASTR 1303, 1304, 1403, 1404; BIOL 1306/1106, 1309; CHEM 1305/1105; PHYS 1305, 1307; GEOG 1301; GEOL 1301, 1305, 1345 DCH: SCIRSD 1A/1B-DCH	Associate of Science Additional Mathematics..... 7 hours ☐ MATH 1316 (DCH = PRECAL A) ☐ MATH 2412 (DCH = PRECAL B) Additional Natural Science with lab..... 8 hours ☐ Science w/ Lab _____ ☐ Science w/ Lab _____ College-Level Electives..... 8 hours ☐ SPCH 1311 DCH = Pub Speaking ☐ Creative Art: _____ ☐ ENGL 2323 DCH = English 4B DCH ☐ LOTE _____ ☐ LOTE _____ ☐ LOTE _____ ☐ LOTE _____ ☐ Other: _____ ☐ Other: _____ ☐ Other: _____
Creative Arts..... 3 hours ☐ ARTS 1301, 1303; MUSI 1306, 1307, 1310; DRAM 1310, 2361	
American History..... 6 hours ☐ HIST 1301 (DCH: USHIST A) ☐ HIST 1302 (DCH: USHIST B)	
Government..... 6 hours ☐ GOVT 2305 (DCH = HS US Government) ☐ GOVT 2306 (DCH = SPTSS ?)	
Social and Behavioral Science..... 3 hours ☐ ECON 2301 (DCH = HS Economics); GEOG 1303; PSYC 2301, 2314; SOC 1301, 1309; TECA 1354	
Component Area Option..... 6 hours ☐ EDUC 1300 (DCH = Coll Train) ☐ NINE 1304 (DCH = Health) ☐ LOTE _____	NOTES:

Career, Technical Education & Experiential Learning

CTE at HAIS begins in grades 9–10 with career exploration, research, and applied learning, and culminates in:

- Project-based research in grade 11
- Internships and real-world experiences in grade 12

CTE pathways are intentionally aligned to:

- HCC degree plans
- Workforce-relevant skills
- Civic engagement and global competence

Exit Standards: What HAIS Graduates Will Know and Be Able to Do

By graduation, HAIS students will demonstrate competencies aligned to the Asia Society ISSN Graduate Profile, including:

Academic & College Readiness

- Master TEKS across all core content areas
- Successfully complete college-level coursework through HCC and AP
- Demonstrate readiness for postsecondary academic expectations

Global & Civic Competence

- Analyze global and local issues from multiple perspectives
- Engage responsibly in civic life and democratic processes
- Communicate effectively across cultures and contexts

Critical Thinking & Research

- Conduct independent research and inquiry
- Apply evidence-based reasoning to real-world problems
- Synthesize information across disciplines

Professional & Academic Behaviors

- Demonstrate organization, persistence, and self-advocacy
- Manage college syllabi, deadlines, and expectations
- Collaborate effectively while maintaining independent learning skills

Alignment to Early College and ISSN Model

HAIS's graduation requirements and exit standards are fully aligned to:

- The Texas Early College High School framework
- Houston ISD graduation policies
- The Asia Society ISSN design principles, emphasizing:
 - Rigorous academics for all students
 - Equitable access to college credit
 - Global competence and civic engagement
 - Preparation for college, career, and life beyond high school

Conclusion

Through this comprehensive graduation plan and clearly articulated exit standards, Houston Academy for International Studies ensures that every graduate earns a Texas high school diploma with distinction while leaving prepared for college completion, career success, and active participation in an interconnected world.

HAIS Attachment 2: Enrollment Policy

HAIS will continue to follow HISD Enrollment Policy and guidelines as a magnet school.

A copy of the policy can be found below:

[Online Enrollment Technical and Manual Process 24-25 5 1](#)

H AIS Attachment 3: Discipline Policy

H AIS will continue to follow the H ISD Code of Student Conduct and Discipline policies that can be found in the link below:

[H ISD Discipline Policy](#)

HAIS Attachment 4: Organization Chart

FRIENDS OF THE HOUSTON ACADEMY FOR INTERNATIONAL STUDIES (501(c)3)
BOARD OF TRUSTEES



Melissa Jacobs-Thibaut

Executive Director (Friends of HAIS) & Principal



Assistant Principal

Assistant Principal

Assistant Principal

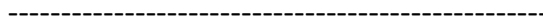
Adelisse Gomez

Charles Kaspari

Sarah Yockey

(Student Support, Culture,
Attendance, Graduation)

(Instruction, Compliance,
Operations, Discipline)



HAIS Teachers, Counselors,
Instructional Coaches, Advisors

HAIS Attachment 4: Organization Chart (continued)

Level	Entity / Role	Primary Responsibilities
Governance	Friends of the Houston Academy for International Studies (501(c)(3)) Board of Trustees	Approves budget, financial policies, audits, strategic direction, compliance, fundraising priorities, and Executive Director evaluation
	Finance Committee (Board)	Reviews financial statements, audits, internal controls, and budget-to-actuals
	Governance Committee (Board)	Board development, bylaws, policy oversight
Executive Management	Melissa Jacobs-Thibaut (Executive Director, Friends of HAIS & Principal, HAIS)	Strategic leadership, budget execution, staffing, academic program implementation, compliance with HISD and TEA
School Operations	Assistant Principal – Adélisse Gomez	College Liaison, Dual Credit alignment attendance, graduation
	Assistant Principal – Sarah Yockey	Student supports, attendance, interventions, campus culture, family engagement
	Assistant Principal – Charles Kaspari	Instructional quality, compliance, discipline systems, daily operations
Instructional Execution	Instructional Coordinator, Teachers, Counselors, Coaches	Deliver curriculum, monitor data, support students, implement early-college model

BYLAWS

Friends of the Houston Academy for International Studies
A Texas Nonprofit Corporation

ARTICLE I – NAME & PURPOSE

Section 1. Name

The name of the organization shall be **Friends of the Houston Academy for International Studies** (“Friends of HAIS”).

Section 2. Purpose

Friends of HAIS is organized exclusively for **charitable and educational purposes** under Section 501(c)(3) of the Internal Revenue Code. Its purpose is to support, enhance, and advance the mission of the **Houston Academy for International Studies (HAIS)** by providing financial, programmatic, and governance support that promotes academic excellence, college readiness, and global citizenship for Houston students.

ARTICLE II – NONPROFIT STATUS

No part of the net earnings of the organization shall inure to the benefit of any private individual. The organization shall not engage in political campaigning or lobbying except as permitted by law.

ARTICLE III – BOARD OF TRUSTEES

Section 1. Authority

HAIS Attachment 5: Board Documents (continued)

The Board of Trustees (“Board”) shall have full **fiduciary, legal, and governance authority** over Friends of HAIS.

Section 2. Composition

The Board shall consist of not fewer than **three (3)** voting members. No member may be an employee of Houston ISD.

Section 3. Terms

Board members shall serve **three-year staggered terms** and may be reappointed.

Section 4. Removal

A Board member may be removed by majority vote for cause including breach of fiduciary duty, misconduct, or failure to attend meetings.

ARTICLE IV – OFFICERS

Officers shall include:

- Chair
- Treasurer
- Secretary

The Treasurer oversees financial reporting and audits.
The Chair presides over meetings and supervises the Executive Director.

ARTICLE V – MEETINGS

The Board shall meet **at least quarterly**. A majority constitutes a quorum.

ARTICLE VI – COMMITTEES

Standing committees shall include:

- Finance & Audit Committee
- Academic & Program Committee
- Governance Committee
- Development Committee

Committees report to the full Board.

ARTICLE VII – EXECUTIVE DIRECTOR

The Board shall appoint an **Executive Director** who manages daily operations, finances, fundraising, and school support.

ARTICLE VIII – FINANCIAL MANAGEMENT

The Board shall:

- Approve annual budgets
- Require monthly financial reports
- Require an annual independent audit
- Ensure compliance with nonprofit and TEA financial standards

ARTICLE IX – CONFLICT OF INTEREST

The organization shall adopt and enforce a **Conflict of Interest Policy** requiring annual disclosures and recusal from conflicted decisions.

ARTICLE X – INDEMNIFICATION

Friends of HAIS shall indemnify Board members to the fullest extent allowed by law.

ARTICLE XI – DISSOLUTION

Upon dissolution, assets shall be distributed to the Houston Academy for International Studies or a **501(c)(3) organization supporting public education**.

ARTICLE XII – AMENDMENTS

These bylaws may be amended by a two-thirds vote of the Board.

Conflict of Interest Policy

Friends of the Houston Academy for International Studies (501(c)(3))

I. Purpose

The purpose of this Conflict of Interest Policy is to protect the integrity of Friends of the Houston Academy for International Studies (“Friends of HAIS”) by ensuring that all decisions are made solely in the best interest of the organization and the students it serves, and that real or perceived conflicts of interest are identified, disclosed, and managed appropriately.

II. Persons Covered

This policy applies to:

- Members of the Board of Trustees
 - Officers
 - Committee members with board-delegated powers
 - Key employees or consultants, as applicable
-

III. Definition of Conflict of Interest

A conflict of interest exists when a covered individual has a financial, professional, or personal interest that could compromise—or appear to compromise—the individual’s ability to act in the best interest of Friends of HAIS.

HAIS Attachment 5: Board Documents (continued)

Conflicts may include, but are not limited to:

- Financial interests in vendors or contractors
 - Employment or consulting relationships
 - Family or household relationships with individuals who may benefit from board decisions
 - Any situation that may result in personal gain
-

IV. Duty to Disclose

Each covered individual must:

- Complete a written Conflict of Interest Disclosure Statement annually
 - Disclose any actual, potential, or perceived conflicts as they arise throughout the year
 - Update disclosures promptly if circumstances change
-

V. Procedures for Addressing Conflicts

When a conflict is disclosed:

1. The individual must disclose the conflict to the Board Chair or Governance Committee
2. The individual must leave the meeting during discussion of the matter
3. The individual must not vote on the matter
4. The Board or committee shall determine whether a conflict exists and document its decision
5. The decision and recusal shall be recorded in the meeting minutes

VI. Violations of the Policy

If the Board has reasonable cause to believe a conflict has not been disclosed:

- The individual will be informed and allowed to explain
 - The Board may take corrective action, including removal, if warranted
-

VII. Annual Certification

Each covered individual shall annually certify in writing that they:

- Have received and read the Conflict of Interest Policy
 - Understand the policy
 - Agree to comply with its terms
 - Have disclosed all required information
-

VIII. Recordkeeping

All disclosure forms and related documentation shall be retained by the organization in accordance with record retention requirements and made available for audit or regulatory review.

IX. Review and Approval

This policy shall be reviewed annually by the Governance Committee and approved by the Board of Trustees.

HAIS Attachment 5: Board Documents (continued)

Code of Ethics

Friends of the Houston Academy for International Studies (501(c)(3))

I. Purpose

The purpose of this Code of Ethics is to promote ethical conduct, accountability, and transparency in the governance and operations of Friends of the Houston Academy for International Studies ("Friends of HAIS"). This Code establishes standards of behavior that ensure decisions are made in the best interest of the organization, the school, and the students served.

II. Scope

This Code applies to:

- Members of the Board of Trustees
 - Officers and committee members
 - The Executive Director
 - Any individuals acting on behalf of Friends of HAIS in an official capacity
-

III. Ethical Principles

1. Commitment to Mission

All actions and decisions shall advance the mission of Houston Academy for International Studies and promote equitable access to high-quality educational opportunities for students.

HAIS Attachment 5: Board Documents (continued)

2. Integrity and Honesty

Board members and officers shall act with honesty, integrity, and fairness in all organizational matters, avoiding misrepresentation, favoritism, or personal gain.

3. Fiduciary Responsibility

Individuals shall uphold the fiduciary duties of care, loyalty, and obedience, exercising sound judgment and acting in the best interests of Friends of HAIS.

4. Avoidance of Conflicts of Interest

Individuals shall avoid real or perceived conflicts of interest and comply fully with the organization's Conflict of Interest Policy, including annual disclosures and recusal when required.

5. Confidentiality

Non-public information obtained through service to Friends of HAIS—including financial, personnel, and student-related information—shall be kept confidential and used solely for organizational purposes.

6. Respect and Professional Conduct

All individuals shall treat students, families, staff, and fellow board members with respect and dignity and shall promote a culture of professionalism and collaboration.

7. Compliance with Laws and Policies

Individuals shall comply with all applicable **federal, state, and local laws**, including Texas Education Code, IRS nonprofit regulations, and all board-adopted policies and procedures.

8. Responsible Use of Resources

Organizational resources shall be used responsibly and exclusively for the benefit of Friends of HAIS and the students it serves.

HAIS Attachment 5: Board Documents (continued)

IV. Reporting Ethical Concerns

Any individual who becomes aware of a violation of this Code or other unethical behavior has a duty to report concerns to the Board Chair or Governance Committee without fear of retaliation.

V. Enforcement

Violations of this Code may result in corrective action, including censure, removal from office, or other actions deemed appropriate by the Board of Trustees.

VI. Annual Acknowledgment

All covered individuals shall annually acknowledge in writing that they have read, understand, and agree to comply with this Code of Ethics.

Adopted by the Friends of the Houston Academy for International Studies Board of Trustees

HAIS Attachment 5: Board Documents (continued)

Friends of the Houston Academy for International Studies (501(c)(3))

Board of Trustees – Statement of Assurances

As a member of the Board of Trustees of Friends of the Houston Academy for International Studies ("Friends of HAIS"), I affirm that I will act in the best interests of the organization and the students it serves. I agree to comply with all adopted bylaws, the Code of Ethics, and the Conflict of Interest Policy, and to avoid any real or perceived conflicts of interest.

Printed Name:

Brian Gaston

Date (MM/DD/YYYY):

09/21/1986

Board Position (if applicable):

Signature:

Brian Gaston

Signature line is intended for handwritten or digital signature.

HAIS Attachment 5: Board Documents (continued)

Friends of the Houston Academy for International Studies (501(c)(3))

Board of Trustees – Statement of Assurances

As a member of the Board of Trustees of Friends of the Houston Academy for International Studies ("Friends of HAIS"), I affirm that I will act in the best interests of the organization and the students it serves. I agree to comply with all adopted bylaws, the Code of Ethics, and the Conflict of Interest Policy, and to avoid any real or perceived conflicts of interest.

Printed Name:

Jennifer Kapral

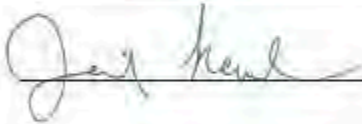
Date (MM/DD/YYYY):

01/16/2026

Board Position (if applicable):

N/A

Signature:



HAIS Attachment 5: Board Documents (continued)

Friends of the Houston Academy for International Studies (501(c)(3))

Board of Trustees – Statement of Assurances

As a member of the Board of Trustees of Friends of the Houston Academy for International Studies ("Friends of HAIS"), I affirm that I will act in the best interests of the organization and the students it serves. I agree to comply with all adopted bylaws, the Code of Ethics, and the Conflict of Interest Policy, and to avoid any real or perceived conflicts of interest.

Printed Name: _____

Brenda A. Rangel

Board Position (if applicable): _____

Board member

Signature: _____

Brenda A. Rangel

Signature line is intended for handwritten or digital signature.

HAIS Attachment 6: Board Member Information

Board Member Information

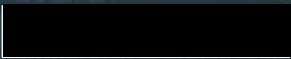
Board Member	Current Position	Professional Summary
Jennifer Kapral	Executive Director, Preservation Houston	<p>Jennifer Kapral is a nonprofit executive and civic leader with extensive experience in global education, organizational leadership, and nonprofit management. She brings 13 years of experience working in Houston’s K–12 education system, with a focus on internationally oriented curriculum development, cross-cultural learning, and global exchange, plus 8 years of non-profit management experience.</p> <p>Her global education work includes participation in a Fulbright-Hays seminar in Egypt focused on curriculum development, as well as professional travel to China and Japan centered on both in-person and virtual exchange models. In addition to her education background, Jennifer has senior nonprofit leadership experience, with expertise in strategic planning, governance, fundraising, and organizational management across education, arts and culture, and historic preservation organizations.</p> <p>Jennifer is deeply committed to advancing global engagement, educational access, and institutional sustainability, and she brings a thoughtful, collaborative, and mission-driven approach to board service</p>
Dr. Brenda Rangel	Assistant Dean, Rice University Susanne M. Glasscock School of Continuing Studies	<p>Dr. Brenda A. Rangel is the Assistant Dean for the Susanne M. Glasscock School of Continuing Studies, where she leads initiatives that advance the university’s EC–12 educational outreach programs. She provides strategic leadership for the Rice University Center for Education, overseeing the development of new programs and the enhancement of existing offerings within the Center for College Readiness (CCR), School Literacy and Culture (SLC), and the Education department.</p> <p>Dr. Rangel teaches, advises, and mentors new teachers and emerging leaders. She also serves on the Faculty Senate’s Committee on Teaching and represents Rice as a key member of the EC–12 Council. In addition, she co-leads Glasscock’s development efforts by cultivating partnerships and identifying potential funding opportunities.</p> <p>Before joining Rice, Dr. Rangel spent 25 years in public Education, holding roles that included Chief Academic Officer, Area Director, performance and continuous improvement manager, principal, bilingual teacher, and middle and high school administrator.</p> <p>Deeply committed to leadership development and community engagement, Dr. Rangel founded the Latina Leaders Learning Group to mentor emerging leaders in Houston. She volunteers for Power on Heels Fund and is actively involved in numerous professional and civic organizations, including the Texas Council of Women School Executives, Ed Trust Educator Advisory Council, the Consortium of</p>

		<p>State Organizations for Texas Teacher Education (CSOTTE), the Texas Association of Colleges for Teacher Education (TACTE), Texas MS Foundation, and Navidad en El Barrio and Mariachi Festival Foundation.</p> <p>A native of the Rio Grande Valley, Dr. Rangel earned a Bachelor of Arts in Political Science and Spanish from Sam Houston State University, a Master of Science in Curriculum & Instruction from Houston Baptist University, and a Doctorate in Educational Leadership and Policy from The University of Texas at Austin.</p>
Dr. Brian Gaston	Executive Director, The Smiley Institute	<p>Dr. Brian Gaston is an independent solutions expert and learning facilitator who works closely with PreK-12 stakeholders to address the most pressing challenges facing schools in underserved communities. Previously, Brian was a fulltime doctoral student in educational leadership at Harvard University. He completed his doctoral residency as a senior leader with the Division of School Leadership at New York City Public Schools. In this role, Brian led the design and implementation of the citywide school improvement strategy for the system's 144 priority schools. He also received Harvard's prestigious Presidential Public Service Fellowship and Adrian Cheng Fellowship for Social Innovation. Additionally, Brian served as an award-winning high school principal, assistant principal, and secondary teacher in the Houston Independent School District (HISD). Some of his most meaningful distinctions include Rookie Principal of the Year, HISD Secondary Teacher of the Year, and leading his campus to the National Blue Ribbon School award.</p> <p>Brian holds a BBA in Management from The University of Texas at Austin, an M.Ed. in Teacher Leadership from the University of St. Thomas, and an Ed.L.D. from Harvard University.</p>

HAIS Attachment 6: Board Member Information

Jennifer Kapral, Board Member

Contact



www.linkedin.com/in/jennifer-kapral
(LinkedIn)

Top Skills

Microsoft Office
Major Gift Development
Volunteer Management

Languages

English (Native or Bilingual)
Russian (Elementary)

Certifications

English As A Second Language Teacher
Virtual Exchange Academy
Teacher Of English
Principal Certification, Texas
Social Studies Teacher

Jennifer Stephan Kapral

Non-Profit Leadership | Education | Intercultural BridgeBuilder
Houston, Texas, United States

Summary

Nonprofit executive and civic leader with deep Houston roots and a career spanning education, arts and culture, museums, and historic preservation. I bring over 20 years of experience in K-12 education and 8+ years in nonprofit leadership, blending strategic vision with data-informed decision-making.

As Executive Director of Preservation Houston, I focus on organizational growth, expanded programming, and long-term sustainability—strengthening institutions while increasing relevance, reach, and impact. I'm passionate about preserving historic places as living assets that tell inclusive stories and support vibrant, resilient communities.

Experience

Preservation Houston

Executive Director

April 2025 - Present (10 months)

Houston, Texas, United States

Asia Society Texas Center

Senior Director of Education and Outreach

February 2019 - April 2025 (6 years 3 months)

Houston, Texas Area

- Co-lead \$11 million Capital Campaign and ongoing philanthropic support for a new permanent education exhibition
- Write grants and develop sponsorship packets/asks for levels from 10K to 2.5 million
- Build and develop a student online learning platform featuring original, compelling webcomics aligned to education standards and designed by artists from across the globe
- Manage scholars, graduate students, and interns to write, review, and edit all content, lesson plans, and curriculum materials related to the exhibition and learning platforms

Page 1 of 5

HAIS Attachment 6: Board Member Information

Jennifer Kapral, Board Member

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- Create KPIs, strategic plans, and five-year plans for all major organizational initiatives as well as specific education initiatives
- Manage all Asia Society Education and Outreach programming, including field family festivals, field trips, classes, performances, etc.
- Actively support DEAI work as a member of the DEAI Leadership Circle and Accessibility Task Force

Houston ISD

Dean of Instruction

February 2015 - February 2019 (4 years 1 month)

Houston Academy for International Studies

- Collaborate with the leadership team, faculty, and staff to implement a rigorous, project-based international studies curriculum in all content areas
- Forge partnerships with various non-profit organizations to facilitate processes for students to study abroad, writing grants for \$300,000 of scholarship funds
- Plan with Houston Community College and other Early College High Schools to develop graduation plans and programs for students

Fort Bend ISD

Associate Principal

July 2014 - February 2015 (8 months)

Lake Olympia Middle School

- Collaborate with leadership team to develop campus-wide goals, systems, plans, master schedule, budget, etc.
- Communicate routinely and effectively with parents, staff, community
- Lead staff development on student engagement, literacy, discipline, and rigor

Raise Your Hand Texas

Program Director

June 2012 - July 2014 (2 years 2 months)

- Manage leadership development programs in partnership with the Harvard Principals' Center and Rice University for 500+ principals across Texas
- Develop an online community for ongoing principal professional development
- Coach principals to develop a prospectus that is results-driven and shows evidence of student learning based on the application of learning from the Harvard experience
- Research education policy from across the U.S. and abroad

HAIS Attachment 6: Board Member Information

Jennifer Kapral, Board Member

- Collaborate with RYHT team to develop education policy recommendations for the Texas legislative sessions

Sharpstown International School 6-12

Assistant Principal, Teacher, and International Studies Coordinator

June 2008 - July 2012 (4 years 2 months)

Houston, TX

- Managed and evaluated a team of 14 English teachers and 7 Social Studies teachers
- Implemented a school-wide college readiness and globally focused curriculum centered around increasing passing scores on our AP tests by 20%
- Developed data-driven state testing plan and intervention plans with two departments meeting the goal of 90% passing rates and a minimum of 25% commended scores
- Led professional development sessions around project based learning and global curriculum that resulted in 100% of teachers designing and implementing a global project-based learning task

Sam Houston High School

Title III Coordinator/ESL Lead Teacher

August 2005 - July 2008 (3 years)

- Taught junior and senior ESL students, many of whom previously were reading at a 5th grade level, to achieve more than two years of growth in a single year on the 2005 and 2006 national Stanford tests.
 - Determined needs of the ESL department by analyzing student data and student tracking systems for all ESL students, coordinating after-school tutorial intervention.
- Presented trainings on language acquisition and ESL classroom strategies for Sam Houston faculty, ESL department, HISD Multilingual Department at their Professional Development Day, Title III Coaching Academy, ABRAZO new teacher training.
- Organized 3 Global Citizen student travel trips to Europe and Japan, fundraised over \$15,000, and was voted by faculty as ESL Teacher of the Year, 2007-2008.
 - Served as ESL curriculum leader in 2006-2007, developed curriculum with a focus on differentiation and modifications, designed tutorials program.
 - Selected as High School ESL Content Team Leader for Teach for America, create agendas, facilitate meetings, and brainstorm problems/solutions for new ESL teachers

Jennifer Kapral, Board Member

Teach for America
Corps Member Advisor
April 2007 - July 2007 (4 months)

- Trained, managed, and observed a group of 12 new teachers for five weeks to identify key teacher actions to increase student achievement in a summer school setting.
- Supervised teachers and reviewed lesson plans daily in high school English, Social Studies, Math and Science classrooms, evaluating them weekly on a 13 point rubric.
- Conducted daily sessions on classroom management, lesson planning, positive classroom incentives, creating assessments, tracking student data.
- Analyzed school-wide teacher and student data with a team of 6 to determine how staff can best support new corps members through differentiated sessions and observations

United States Student Association
Electoral Action Trainer
March 2004 - December 2004 (10 months)

- Traveled to college campuses to collaborate with local student leaders to train students in voter registration tactics, voter education strategies, and voter mobilization actions

Amizade Global Service-Learning
Volunteer
May 2000 - August 2004 (4 years 4 months)

International Organizations: Brazil, and Ireland Revealed

- Worked construction with Brazilian at-risk teenagers to build youth center in Santarem, Brazil, studied development and NGOs, conducted research paper on affirmative action in Brazil
- Conducted documentary photography in low-income communities of Dublin and Belfast

Jumpstart Americorps
Corps Member
August 2003 - May 2004 (10 months)

- Tutored four year-olds, applying conflict resolution techniques, literacy development, and collaborated with team of 12 for lesson planning, family involvement, community service

Jennifer Kapral, Board Member

Education

Rice University

Leadership in Action Certificate, Non-Profit/Public/Organizational Management · (September 2025 - May 2036)

University of St. Thomas (TX)

Masters, Education · (2008 - 2010)

University of Pittsburgh

B.A., Politics and Philosophy, English Writing, Russian and East European Studies · (2000 - 2004)

School for International Training

Study Abroad, Women and Democratization: The Balkans · (2003 - 2003)

Dr. Brian Gaston, Board Member

Brian Gaston, Ed.L.D.

PROFESSIONAL SUMMARY

Leadership and learning expert with 15 years of experience in driving innovation, developing talent, and designing adaptive systems. Offers deep expertise in organizational culture, ethical leadership, program development, and strategic planning to help organizations discover new pathways, strengthen leadership capacity, and achieve mission-driven results.

EDUCATION

Doctor of Education Leadership May 2023

Harvard University - Cambridge, MA

Capstone: "Building an Atlas of Support: A Comprehensive Approach to School Improvement in New York City"

Committee: Dr. Irvin Scott (Chair), Dr. Elizabeth City, Dr. Desmond Blackburn, Dr. Danika Rux

Master of Education in Teacher Leadership May 2013

University of Saint Thomas - Houston, TX

Thesis: "The Value of Core Content Areas to Success"

Advisor: Dr. Catherine Barber

Bachelor of Business Administration in Management May 2010

University of Texas at Austin

PROFESSIONAL EXPERIENCE

Chief in Residence, Division of School Leadership June 2022 – June 2023

New York City Department of Education - New York, NY

Led strategy, governance, and professional development for 45 area superintendents and 1,600 principals, managing school turnaround, cross-agency collaboration, and equity reforms in the nation's largest school district.

High School Principal August 2017 – July 2020

Houston Independent School District – Houston, TX

Led an award-winning Title I early college high school to top state accountability ratings and multiple national distinctions through sustained excellence across academics, arts, athletics, culture, and organizational coherence.

High School Assistant Principal August 2014 – August 2017

Houston Independent School District – Houston, TX

Provided strategic and instructional leadership in a 3,000-student high school, managing operations, staff development, and school improvement initiatives that advanced academic performance and talent retention.

School Director & Dean of Social Studies Summer 2014 – Summer 2017

Teach For America, Summer Institute – Houston, TX

Led a national pre-service teacher training institute serving 200+ teachers across 12 regions, managing 20 instructional coaches, and building capacity that achieved the highest student achievement and staff satisfaction.

CONSULTING & ADVISORY EXPERIENCE

Education Consultant January 2021 – Present

Various Clients – Houston, TX

Leads an independent consulting practice that designs leadership development programs, conducts organizational assessments, and offers strategic guidance for PreK–12 systems, enhancing culture and student outcomes.

Learning Facilitator June 2024 – Present

EdEthics/Justice in Schools, Harvard Graduate School of Education – Cambridge, MA

Facilitates a national professional learning community that helps educators teach contested histories and respond to restrictive education policies with ethical leadership and instructional courage.

Dr. Brian Gaston, Board Member

Executive Coach	June 2021 – July 2023
<i>Developing Capacity Coaching – Remote, USA</i>	
Coached nonprofit and school system executives across the country to enhance personal development, leadership skills, and sustainable organizational change.	
Academic Advisor	July 2021 – May 2022
<i>Harvard Graduate School of Education – Cambridge, MA</i>	
Served as an academic advisor to Master of Education students in the Teacher Education Program, providing personalized guidance on coursework, research, and career paths.	
Member	August 2017 – August 2020
<i>Rice University Advisory Committee for Educator Certification – Houston, TX</i>	
<i>Harris County Department of Education Advisory Committee for Educator Certification – Houston, TX</i>	
Advised university and county education leaders on educator certification policy, compliance, and innovation to ensure alignment with Texas Education Agency standards and outcomes.	
TEACHING EXPERIENCE	
Teaching Fellow, Leading Learning	Spring 2022
<i>Harvard Graduate School of Education – Cambridge, MA</i>	
Designed and facilitated lectures, class activities, and assessments for master's students on instructional systems alignment, school culture, teacher development, and organizational change.	
Teaching Fellow, Leading School Strategy & Innovation	Fall 2021
<i>Harvard Graduate School of Education – Cambridge, MA</i>	
Designed and facilitated lectures, class activities, and assessments for master's students on organizational diagnosis, strategic alignment, innovation, and change execution in schools.	
Social Studies & Math Teacher, Grades 6-12	August 2010 – July 2014
<i>Houston Independent School District – Houston, TX</i>	
Served in various instructional and leadership roles, including content department chair, grade-level chair, and campus induction coach, promoting academic excellence, student engagement, and teacher development.	
RESEARCH & APPLIED SCHOLARSHIP	
Doctoral Practitioner	August 2020 – May 2023
<i>Harvard University – Cambridge, MA</i>	
Conducted applied research and consulting projects with public school systems and education organizations, producing theory-based, data-informed action proposals on equity, innovation, and systemic change.	
Research Assistant, School Leadership & Management Courses	June 2021 – December 2021
<i>Harvard Graduate School of Education – Cambridge, MA</i>	
Conducted research on theories, frameworks, and practices to inform the design and syllabi development of graduate-level coursework.	
AWARDS & FELLOWSHIPS	
Texas Build Fellowship	August 2023 – February 2024
<i>BES – Houston, TX</i>	
Bersin-Foster Family Fellowship	August 2020 – May 2023
<i>Harvard Graduate School of Education – Cambridge, MA</i>	
Adrian Cheng Social Innovation & Change Initiative Fellowship	August 2021 – May 2022
<i>Center for Public Leadership, Harvard Kennedy School – Cambridge, MA</i>	

Dr. Brian Gaston, Board Member

Presidential Public Service Fellowship <i>Harvard University – Cambridge, MA</i>	June 2021 – August 2021
Rookie Principal of the Year <i>Houston Independent School District – Houston, TX</i>	June 2018
Excellence in Leadership Award <i>Houston Independent School District – Houston, TX</i>	October 2017
Fishman Prize for Superlative Classroom Practices, Honor Roll <i>The New Teacher Project (TNTP) – New York, NY</i>	May 2014
Christa McAuliffe In Search of Excellence Award, Secondary Finalist <i>Houston West Chamber of Commerce – Houston, TX</i>	January 2013
Kinder Excellence in Teaching Award <i>Kinder Foundation – Houston, TX</i>	September 2012
Secondary Teacher of the Year <i>Houston Independent School District – Houston, TX</i>	April 2012
Teacher of the Year <i>Hogg Middle School – Houston, TX</i>	February 2012
Sue Lehman Award for Excellence in Teaching, Regional Finalist <i>Teach For America – New York, NY</i>	January 2012

PRESENTATIONS & SPEAKING ENGAGEMENTS

- Gaston, B.** (2023) – “The Atlas Collaborative: Reimagining how the Division of School Leadership accelerates the improvement of NYC Public Schools.” Presenter at New York City Department of Education Superintendent Summit
- Gaston, B.** (2022) – “The Pareto Principle in School Leadership.” Presenter at New York City Department of Education Superintendent Onboarding Institute
- Gaston, B.** (2019) – “Data in Action – Using Distinction Data to Drive Change.” Presenter at Educate Texas CCR Schools Model Convening
- Gaston, B.** (2019) – “Houston Strong: Early College Success in HISD.” Panelist at Texas Education Agency CCR Schools Model Leadership Summit
- Gaston, B.** (2019) – “Leading Schools in the Wake of a Natural Disaster.” Panelist at Teach For America School Leaders of Color Conference
- Gaston, B.** (2014) – “Creating a Culture of Success: The First Days of School.” Presenter at Harris County Department of Education New Teacher Summit

SERVICE & OUTREACH

Chapter Advisor <i>Gents Brotherhood Organization – Houston, TX</i>	November 2014 – July 2020
Team Lead, Growth Track Ministry <i>Hope City Church – Houston, TX</i>	August 2019 – August 2020

HAIS Attachment 6: Board Member Information

Dr. Brian Gaston, Board Member

Executive Director, Young Adult Ministry
Grace Cathedral Church – Houston, TX

August 2012 – April 2014

CERTIFICATIONS

Texas State Board for Educator Certification

Principal (Grades EC-12)
Social Studies (Grades 8-12)
Mathematics (Grades 4-8)
Generalist (Grades 4-8)
English as a Second Language Supplemental (Grades 4-12)

REFERENCES

Available upon request.

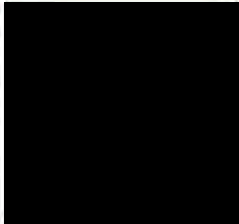
Dr. Brenda Rangel, Board Member

BRENDA A. RANGEL, ED.D

Professional Summary

A result-oriented and highly skilled educator with 30 years of proven track record in public K-12 and higher educational systems. Reputable accomplishments in transformational and organizational leadership, school finance, coaching and feedback, and emerging leader development. Focused on equity by providing culturally relevant learning opportunities for all students by investing and building district and staff capacity.

Contact



Education

Doctorate in Education Ed.D.:
Educational Leadership & Policy
8/2021
The University of Texas at Austin
- Austin, TX

Master of Arts/Certification:
Educational Administration
07/2003
California Polytechnic State
University at Pomona
- Pomona, CA

Master of Arts:
Curriculum & Instruction
07/2001
Houston Baptist University
- Houston, TX

Bachelor of Arts:
Political Science and
Spanish
05/1993
Sam Houston State University
- Huntsville, TX

Work History

Assistant Dean

8/2022 to Present

Rice University Center for Education – Houston, TX

- Conceptualized ideas and concepts that further support the strategic goal of the University's PreK-12 educational outreach programs and mission.
- Managed all Rice Center for Education EC-12 program personnel
- Led the creation of new programs or enhancement of existing offerings related to the Center for College Readiness (CCR), School Literacy and Culture (SLC), and Education department programs.
- Authored vision and strategy for the Center for Education External EC-12 contact person for potential funding opportunities.
- Professor and Field Supervisor for Rice Education New Teachers and Aspiring Principals
- Member of Rice Faculty Senate Committee on Teaching
- Duncan Hall Associate
- Advisor and Mentor for Undergrads

Chief Academic Officer

6/2020 to 7/2022

Raul Yzaguirre Schools for Success (RYSS) Charter – Houston, TX

- Cabinet Member for RYSS and Tejano Center
- Executed District Policy and Due Process procedures and presented District goals and initiatives to the RYSS Board of Trustees
- Founding CAO for four new campuses
- Finance Committee member; managing 12 department budgets
- District lead for central office and principal evaluation system; conducted over 20 calibrations for the Teacher Incentive Allotment
- Chief COVID-19 Administrator tasked with the creation of the Texas Education Agency (TEA) District-wide Instructional Continuity Plan
- Project Manager for Texas COVID Acceleration Supports- overseeing 12 million in funds to support leaders and scholars
- Led Texas Education Agency- Special Education and Dyslexia Audits
- Headed the District Behavioral Threat Assessments and Reunification
- Oversaw District Special Population Directors and Principal PLCs
- Cultivated the Principal in Residency Program
- Conceptualized and RYSS New Teacher Academy
- Liaison for RYSS during Region IV Superintendent Meetings
- Region IV Accountability and Instructional Cohort member
- Facilitator of the District Advisory Committee (DAC)
- Coordinated District Collaborative Data Management sessions

BRENDA A.RANGEL, ED.D

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Presentations

- Coaching And Development of Emerging Leaders
- Blended Learning Instructional Design
- Action Research on Emergent Bilinguals
- Data Analysis and Collegial Conversations
- Performance Management and Evaluations
- New Teacher On-Boarding and Development
- District COVID-19 Safety Protocols District Instructional Continuity Proposal
- Weekly COVID-19 Health & Wellness Presentation
- Parent COVID 19 Update
- District Campus Budget Presentation
- District 1:1 Student/Laptop Initiative
- District HB3 Board Goals
- Cohort E-Teacher Incentive Allotment
- HB3 Mentor Allotment
- District Calendar and Handbook Presentations
- Presenter of Virtual Adult Education Training for TCCC/HCC courses

Instructional Coordinator

10/2019 to 6/2020

Raul Yzaguirre Schools for Success Charter – Houston, TX

- Cabinet Member for RYSS and Tejano Center
- Oversaw five Instructional Professional Learning Communities
- Conducted over 30 coaching conversations regarding academic and cultural performance
- Organized 40 Weekly Virtual Learning Professional Learning Communities for Leaders and Adults
- Led Deployment of Instructional Resources and Laptops for SPED, Emergent Bilinguals, and RTI Students
- Attended Virtual Instructional Planning Meetings for Region IV
- Coordinated District Collaborative Data
- Liaison with Houston Community College: GED, ESL, and ELCivic Adult Education classes

Area School Director

01/2017 to 10/2019

Houston ISD – Houston, TX

- Formulated systems for 83 campuses on legal and regulatory policies at the state and local levels
- Delivered targeted academic and cultural support for Area Superintendent, eight School Support Officers, and 43 Campus Principals
- Observed, counseled, and motivated professional staff on performance-based evaluation
- Provided training for School Support Officers and Principals on Board Policy and TEA Accountability
- Conducted over 40 Instructional Rounds using Triangulation Data Processes with school leaders to deliver learning opportunities for campus leadership
- Steered the implementation of the Emerging Leader Summit for 50 Assistant Principals
- Contributor and mentor for Area Principal Mentors
- Liaison and thought partner for District-wide initiatives, new Student Information System, and Student Assistance, Together with Tech Conference and Budget Committee
- Garnered community and business alliances to increase Area academic outcomes and resources significantly

BRENDA A. RANGEL, ED.D

Professional Summary

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Academic Courses

- Qualitative Research Design
- Intro to Systems of Human Inquiry
- Dissertation Seminar
- Adv. Admin. Theory and Practice
- Superintendent Practicum
- Education Politics and Policymaking
- Instructional Leadership
- Economics and Finance
- Superintendent Practicum
- Social and Cultural Context of Education
- Organizational Design and Behavior
- School District Restructuring and Renewal
- Learning Science/STEAM Reform
- Dual Language Education Research: Issues and Trends
- Gender and Adult Development
- Program Evaluation Methods
- School District Functions I
- School District Functions II
- School Law
- Superintendent Seminar

Performance and Continuous Improvement Manager, School Leadership 10/2013 to 01/2017

Houston ISD – Houston, TX

- Administered and monitored employee appraisal and development systems for over 60 campuses to ensure compliance with legal and regulatory policies at the state and local levels
- Provided training and supported principals and other HISD personnel on Board Policy, appraisal requirements, and performance expectations
- Delivered targeted support and coaching for principals and School Support Officers
- Conducted over 100 Instructional Calibration Walks with school leaders to deliver opportunities for appraisers
- Used data to identify areas in need of teacher development, effective performance feedback, documenting employee performance, and crafting development plans
- Participated in over 60 File Review sessions. 100% approval of files by HISD Legal Assisted internal departments, principals, SSOs, and Area Superintendent with the collection of evidence to support critical staffing decisions
- Contributor and Mentor for Principal Candidate Development Opportunity cohort
- Conducted and analyzed over 80 Behavioral Interviews for HISD Effective Teacher Fellowship

Principal Mentor - Elementary Transformation

01/2013 to 10/2013

Houston ISD – Houston, TX

- Assisted with the transition of four Elementary Leadership Teams
- Created a Selection Protocol to ensure a Highly Effective Teacher
- Normed with principals and emerging leaders on Teacher Selection
- Facilitated Norming Sessions on the HISD evaluation system using Teacher Appraisal & Development System
- Coached Principals and their teams on the "System Thinking" approach for the opening of the school year
- Served as a Mentor for principals: Vision, Data Analysis, August Professional Development, Master Schedule, School Improvement Plans, and On-boarding of New Teachers
- Facilitated researched-based conversations regarding Departmentalization with Teacher Small Groups

Dr. Brenda Rangel, Board Member

BRENDA A. RANGEL, ED.D

Professional Summary

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CSP Practicum- Framework of District Functions

- Governance Operations
- Curriculum and Instruction
- Instructional Support Services
- Elementary and Secondary Campus Operations
- Human Resources
- External and Internal Communications
- Administrative, Finance, and Business Operations
- Facilities Planning and Plant Services
- Accountability, Information Management, and Technology Services
- Operational Support Systems—Safety and Security, Food Services, and Transportation

Principal - Brays Oaks Campus

07/2010 to 12/2012

Yes Prep Public Schools – Houston, TX

- Facilitated the implementation of shared Campus Strategic Goals
- Monitored and held faculty and staff accountable to high expectations to produce significant academic gains
- Moved student achievement from Fall 2010 Unacceptable to Spring 2011 Recognized rating; Fall 2012 above YES Prep system average in eight Common Assessment Exams.
- Facilitated an evaluation system using Instructional Evaluation Rubric (IER) and Teacher Continuum
- Lead implementation of High School Expansion Phase 1, 2., and 3 – Focus: student academic and culture
- Created the YES Selection Committee to ensure stakeholders are involved in the hiring of effective leaders
- Conducted Action Research to increase enrollment of African American students into the system

Principal - Fondren Middle School

07/2007 to 07/2010

Houston ISD – Houston, TX

- Facilitated the development of a shared vision and comprehensive school-wide plan to achieve that vision
- Led faculty towards high expectations for all students and delivered significant academic gains
- Moved student achievement from Fall 2007 TEA Unacceptable to Spring 2010 Recognized school rating
- Cultivated, hired, and managed a high-performing team of leaders committed to the school turnaround model
- Managed a 3.5 million budget
- Developed SEL support; Decreased discipline from 2,256 referrals in 2007 to 569 referrals in 2010
- Oversaw campus Professional Learning Communities: Leadership, Learning Impact Team, and Data Team
- Conducted 126 Student/Principal Data Conferences
- Ensured student services and coordinated with community health and social services programs

BRENDA A. RANGEL, ED.D

Professional Summary

A result-oriented and highly skilled educator with 30 years of proven track record in public K-12 and higher educational systems. Reputable accomplishments in transformational and organizational leadership, school finance, coaching and feedback, and emerging leader development. Focused on equity by providing culturally relevant learning opportunities for all students by investing and building district and staff capacity.



Volunteer In Action

- Houston ISD Reach Out for Dropouts Campaign
- YMCA Board Member
- Texas MS Ride
- St. Albert's of Trapani Scholarship Committee
- St. Albert's of Trapani Harvey Recovery Action Committee
- AHSA Scholarship Committee
- Kappa Delta Chi Sorority Alumni Back to School Drive
- Barbara Bush Literacy Drive
- Harris County Precinct 2 Winter Storm Distribution
- Texas Exes Houston Scholarship Committee
- Power On Heels Inc.



Affiliations

- AASA- The Superintendent Association
- Texas Association of School Administrators
- Texas Association of Secondary School Principals
- Texas Council of Women School Executives
- Association of Hispanic School Administrators
- Texas MS Foundation
- Kappa Delta Chi Sorority
- Houston Region Teacher Pipeline CoP
- Rice University Pre-K thru 12 Council
- EdTrust Advisory Council
- Power on Heels Fund

Dean of Curriculum & Instruction

01/2006 to 07/2007

Houston ISD- Sam Houston High School – Houston, TX

- Executed School Policy and District Due Process procedures
- Oversaw Professional Learning Communities: Learning Team, Counselors, Curriculum Team, and Data Team.
- Hired, cultivated, evaluated, and assessed 56 teachers, including all new teachers
- Developed the SAM Mentoring Program for 539 students using INOVA data
- Created the Parent Engagement Intervention Program - resulting in 2,250 parent calls per month

Dean of Students/ Curriculum Coordinator

08/2001 to 07/2005

El Rancho USD- El Rancho High School – Pico Rivera, CA, CA

- Member of district-wide Curriculum Articulation/Vertical Alignment Committee
- Used Edusoft © data as a tool Formal Evidence of Quality Teaching (EQT) Collegial Coaching Observations
- Orchestrated partnership with the City of Pico Rivera on ERUSD- Parent Project© classes to the district
- Primary budget facilitator for a large federally funded grant – 4.1 million over three years
- Organized CSR Mid Review: Robins Consulting Group and Los Angeles County Office of Education

Bilingual Teacher

04/1994 to 08/2001

Houston ISD – Houston, TX

- Fostered a positive, engaging environment for Second Language Learners
- Liaison for community-based organizations to promote parental outreach and involvement
- Chair Language Proficiency Assessment Committee (LPAC)
- Mentor Teacher for beginning teachers/student-teachers
- Braeburn Elementary 2000-2001 Teacher of the Year
- Project YES College Prep Founding Teacher
- Sponsor for College Trips and college readiness activities

HAIS Attachment 7: Leadership team qualifications and role description

HAIS School Leadership

Name / Role	School Leadership, Administration & Governance	Curriculum, Instruction & Assessment Systems	Performance Management & Measurable Success
Melissa Jacobs-Thibaut Principal / Executive Director	Founding principal; 20+ years as a principal; authored original HAIS charter; National Blue Ribbon School leader; TEA A-rated campus	Designed and implemented early college model aligned to TEKS, College Board, and HCC	High associate-degree attainment; high college-going and persistence rates
Charles Kaspari Assistant Principal	Campus operations, discipline systems, compliance, and accountability leadership	Instructional implementation oversight; walkthroughs and coaching	Attendance, behavior, and operational performance monitoring
Adelisse Gomez Assistant Principal	Student services leadership; attendance, graduation, and persistence systems	Monitoring instructional supports and targeted interventions	Associate Degree completion, graduation tracking, and student persistence
Sarah Yockey Assistant Principal	Instructional leadership and teacher development	PLC leadership; curriculum alignment; interim and formative assessment analysis	Improved STAAR, AP, and interim assessment outcomes
Ariana Salinas Counselor	Student advising and postsecondary planning leadership	College readiness systems (TSI, SAT, dual credit monitoring)	Improved college enrollment, readiness, and persistence
Erica Alderete Magnet Coordinator	Enrollment management, compliance, and program governance	Program fidelity monitoring and data reporting	Stable enrollment, equity, and accountability compliance

Jennifer Kapral Board Member – Finance & Nonprofit Governance	Nonprofit executive leadership; board finance oversight; governance experience with Asia Society Texas and Preservation Houston	Ensures fiscal alignment to academic priorities	Budget oversight, audits, financial sustainability
Dr. Brian Gaston Board Member – Academic & Leadership Oversight	Former award-winning principal; district-level leadership; charter and public-school governance experience	Evaluates instructional systems and early college outcomes	Data-driven evaluation of school and leader performance
Dr. Brenda Rangel Board Member – Compliance & Systems	Former HISD Area Superintendent; charter network executive; higher-education administrator	Oversight of academic compliance and special populations	TEA compliance, audit readiness, risk management

HAIS Attachment 8 Staff Recruitment and Hiring Plan

HAIS Staff Recruitment and Hiring Plan

Houston Academy for International Studies (HAIS) implements a strategic, mission-aligned staff recruitment and hiring plan designed to ensure instructional continuity, maintain program quality, and support long-term sustainability. This plan builds on HAIS's strong staff retention history and assumes annual teacher attrition of no more than five (5) teachers, with the majority of current staff expected to remain following the transition to an 1882 school.

Staffing Stability and Transition Planning

HAIS benefits from a highly committed, experienced faculty with deep commitment to the school's early college, international studies, and College Board-aligned instructional model. Prior to the transition to 1882 status, campus leadership will conduct individual staff conferences, interest surveys, and role alignment discussions to ensure clarity of expectations, continuity of instructional practice, and alignment to the school's mission. These proactive steps support retention and minimize disruption.

Targeted Recruitment Strategy

When vacancies occur, HAIS uses a **targeted recruitment approach** focused on attracting candidates who demonstrate:

- Strong content knowledge and certification
- Experience with College Board, dual-credit, or early college instruction
- Commitment to serving economically disadvantaged and first-generation students
- Alignment with HAIS's global, civic, and experiential learning mission

Recruitment strategies include:

- Houston ISD recruitment platforms and educator pipelines
- Partnerships with universities and alternative certification programs
- Referrals from current HAIS staff and professional networks
- Outreach to educators with experience in project-based learning and CTE pathways

HAIS Attachment 8 Staff Recruitment and Hiring Plan (continued)

Selection and Hiring Process

- Candidates undergo a rigorous, multi-step selection process that includes:
- Resume and credential review
- Content-specific interviews
- Demonstration lessons or performance tasks
- Panel interviews with campus leadership and teachers

Final hiring decisions prioritize **instructional quality, cultural fit, and mission alignment**.

Mission-Aligned Incentives and Stipends

To recruit and retain high-quality staff, HAIS offers **stipends and leadership opportunities** for work that directly advances the school's mission, including:

- Dual-credit coordination and student support
- Project-based research and CTE pathway leadership
- Advisory and mentorship roles
- Experiential learning, travel coordination, and community partnerships
- Curriculum development and instructional coaching

These incentives recognize teacher leadership, encourage professional growth, and reinforce shared ownership of the school's success.

Onboarding and Retention

New hires participate in a structured onboarding process that includes:

- Training on the HAIS instructional framework and College Board alignment
- Early college expectations and HCC partnership orientation
- Ongoing coaching and PLC support

Through intentional recruitment, competitive incentives, and a strong professional culture, HAIS ensures it maintains a stable, mission-driven faculty capable of sustaining high academic outcomes during and beyond the transition to 1882 status.

HAIS Attachment 9: Staff Development Plan

Professional Development Plan

Summer (June–July)

- **Pre-AP Summer Institute / College Board Training**
Teachers participate in College Board–facilitated or district-led training focused on Pre-AP course frameworks, instructional strategies, unit design, and assessment alignment.
- **Dual Credit Alignment Sessions (HCC)**
Dual-credit instructors engage in HCC-led orientation and alignment sessions addressing course syllabi, grading policies, instructional expectations, and student supports.
- **Curriculum Mapping & Lesson Internalization**
Teachers collaborate to finalize TEKS-aligned scope and sequence, unit plans, and common assessments using College Board and HCC materials.

August (Pre-Service Week)

- **HQIM Implementation Training**
Campus-led professional learning on effective use of College Board and HCC instructional materials, lesson planning protocols, and instructional routines.
- **Data & Assessment Calibration**
Training on using formative and summative assessments embedded in College Board and HCC materials to monitor student progress.
- **Equity & Access Training**
Strategies for scaffolding rigorous instruction for emergent bilingual students, students with disabilities, and first-generation college students.

Weekly (School Year)

- **Professional Learning Communities (PLCs)**
Content-area PLCs meet weekly to:
 - Plan lessons using College Board and HCC materials
 - Analyze student work and assessment data
 - Adjust instruction and interventions based on student needs
- **Instructional Coaching Cycles**
Coaches provide classroom observations, feedback, and modeling focused on HQIM fidelity and effective instructional practices.

Quarterly

- **Data Review & Instructional Adjustment Days**
Teachers engage in structured data analysis to evaluate student progress and refine instructional approaches.
- **Vertical Alignment Meetings**
Grade-level and cross-content teams review pacing, alignment, and readiness for advanced coursework and dual credit.

HAIS Attachment 9: Staff Development Plan (continued)

Mid-Year (January)

- **Curriculum Reflection & Refinement Session**

Teachers reflect on implementation data, student outcomes, and instructional challenges to refine pacing and supports for the second semester.

Spring (March–April)

- **Advanced Instructional Strategies Workshops**

Focus on higher-order questioning, writing across content areas, and college-level academic skills aligned to College Board and HCC expectations.

- **Dual Credit Transition & Readiness Planning**

Support for students transitioning into upper-level coursework and postsecondary pathways.

Ongoing

- **Embedded Support & Feedback Loops**

Continuous walkthroughs, coaching feedback, and leadership check-ins ensure sustained improvement and consistent implementation.

This comprehensive professional development plan ensures that all instructional staff are well-prepared to implement high-quality instructional materials with fidelity, resulting in rigorous, coherent, and equitable learning experiences for all HAIS students.

HAIS Attachment 9: Staff Development Plan (continued)

HAIS Teacher Induction, Evaluation, and Professional Development Framework

Component (Cycle 9 Focus)	HAIS Design & Implementation	Evidence of Quality & Alignment
Teacher Induction Program <i>(Preparation for unique/challenging program elements)</i>	<ul style="list-style-type: none"> • Summer Induction Institute for all new hires • Orientation to HAIS Early College & International Studies model • Training on TEKS + College Board (Pre-AP/AP) + HCC dual-credit alignment • Project-Based Research, experiential learning, and advisory structures • Mentoring by experienced HAIS teachers 	<ul style="list-style-type: none"> • Teachers prepared to deliver early college coursework and college-level rigor • Consistent instructional expectations across content areas • Faster onboarding and higher first-year teacher effectiveness
Evaluation Tools & Processes <i>(Tracking trends and growth over time)</i>	<ul style="list-style-type: none"> • HISD TTESS framework for observations and feedback • Formal and informal walkthroughs each semester • Student performance data (STAAR, MAP, AP, SAT, TSI, dual credit outcomes) • Teacher self-reflection and annual goal-setting 	<ul style="list-style-type: none"> • Longitudinal tracking of teacher growth across TTESS domains • Data-informed coaching cycles • Identification of instructional trends at individual and campus levels
Targeted & Personalized Staff Support	<ul style="list-style-type: none"> • Weekly grade-level and content PLCs • Individual coaching plans aligned to evaluation data • Mentor support for new teachers • Intervention support for teachers needing targeted growth 	<ul style="list-style-type: none"> • Differentiated professional learning based on need • Continuous improvement culture • Increased instructional consistency and effectiveness

Allocation of Resources for PD	<ul style="list-style-type: none"> • Dedicated PLC time embedded in the master schedule • Release time for coaching, peer observation, and curriculum work • Mission-aligned stipends (dual credit support, research projects, experiential learning coordination) 	<ul style="list-style-type: none"> • Job-embedded professional learning prioritized over one-time workshops • Incentives aligned to HAIS mission and student outcomes
Qualifications of PD Providers	<ul style="list-style-type: none"> • Principal and Assistant Principals trained in instructional leadership and evaluation • Teacher Specialist with expertise in College Board and curriculum alignment • External partners: College Board trainers, HCC faculty, Region IV specialists 	<ul style="list-style-type: none"> • PD facilitated by experienced instructional leaders and adult-learning experts • Access to national and postsecondary expertise
Professional Development Methods	<ul style="list-style-type: none"> • Coaching and co-planning • PLC inquiry cycles and data analysis • Modeling and peer observation • Workshops focused on high-leverage strategies • Reflective practice and feedback loops 	<ul style="list-style-type: none"> • Research-based adult learning practices • Direct application to classroom instruction
Professional Development Calendar	<ul style="list-style-type: none"> • Summer Institute (induction, curriculum alignment) • Weekly PLCs (year-round) • Monthly campus PD sessions • Mid-year data review and recalibration • Spring vertical alignment and planning 	<ul style="list-style-type: none"> • Sustained, coherent PD throughout the year • Continuous alignment to student data and campus goals

HAIS Attachment 10: Financial Plan

Proposed HAIS Budget

<i>Enrollment</i>	481				
	ISD	1882	PPOR-1882	1882 vs PPOR	PPOR-PUA
<i>Tier One Allotments</i>					
Regular Program Allotment	\$1,686,340	\$1,686,340	\$2,923,605	\$1,237,265	\$2,438,645
Small and Mid-Sized Allotment	\$0	\$315,019	\$0	(\$315,019)	\$0
Special Education Allotment	\$138,380	\$138,380	\$10,014	(\$128,366)	\$10,014
Dyslexia Allotment	\$9,944	\$9,944	\$0	(\$9,944)	\$0
Career and Technical Allotment	\$1,393,955	\$1,654,354	\$412,629	(\$1,241,725)	\$412,629
State Compensatory Ed Allotment	\$501,551	\$501,551	\$111,130	(\$390,421)	\$111,130
Bilingual/ESL Allotment	\$33,033	\$33,033	\$15,238	(\$17,795)	\$15,238
Early Education Allotment	\$0	\$0	\$0	\$0	\$0
Gifted/Talented Allotment	\$9,528	\$9,528	\$14,330	\$4,802	\$14,330
Total Tier One Entitlement	\$3,772,731	\$4,348,148	\$3,486,946	(\$861,202)	\$3,001,986
<i>Tier One Allotments</i>					
WADA	607.036	699.622	\$0	(699.62)	\$0
Guaranteed Yield Level 1	\$129.5206	\$129.5206	\$0	(\$130)	\$0
District Tax Rate Level 1 (DTR1)	\$0.0702	\$0.0665	\$0	(\$0.07)	\$0
Level 1 Entitlement	\$551,938	\$602,676	\$0	(\$602,676)	\$0
Guaranteed Yield Level 2	\$49.720	\$49.720	\$0	(\$50)	\$0
District Tax Rate Level 2 (DTR2)	\$0.0000	\$0.0301	\$0	(\$0)	\$0
Level 2 Entitlement	\$0	\$104,749	\$0	(\$104,749)	\$0
Total Tier Two Entitlement	\$551,938	\$707,425	\$0	(\$707,425)	\$0
<i>Total M&O Funding (As an ISD Campus)</i>					

Total Charter Facility Allotment	\$0	\$163,345	\$0	(\$163,345)	
Total	\$4,324,669	\$5,218,918	\$3,486,946	(\$1,731,972)	\$3,001,986
Increase as 1882 vs ISD Campus		\$894,249			
20% of Additional 1882 Funds					
Allocation less 20%		\$5,218,918			
Admin Fee		\$260,946	\$174,347		
0.05					
Adjusted Allocation less 5% Admin. Fee		\$4,957,972	\$3,312,599		
Menu of Services - Required		\$ 678,206			
Menu of Services - Optional		317,956			
Total Menu of Services Cost		\$ 996,162			
Allocation less Admin Fee and Required Menu of Services		\$3,961,810	\$3,312,599	(\$967,167)	
FY25-26 Allocation			\$2,989,803	\$322,796	
FY26-27 Allocation as PUA					\$3,001,986

Instructions for using the TEA Model Local Campus Partner Application Scoring Rubric

Districts may use this model scoring rubric or create their own. Districts that create their own rubric to vet potential operating partners must have the locally created rubric approved as part of the benefits application process.

- If this rubric is altered, the locally developed rubric **MUST** be submitted to TEA by the following due dates (emailed to TXP@tea.texas.gov) as part of the benefits approval process:
 - Friday, December 5, 2025, at 5 p.m. (Central Time), OR
 - No later than 5 days prior to the release of the district's local campus application (whichever date is sooner).

Last updated May 1, 2023.

TEA will not amend model documents (other than for formatting or typos) between the time that the To the Administrator Addressed letter is released and the current year due date.

Revision history:

Date of Update	Revision Summary
May 1, 2023	<ul style="list-style-type: none">• Updated model instructions (this page)• Minor formatting changes/typo corrections• Included criteria to align to updates to the model application:<ul style="list-style-type: none">○ High Quality Instructional Materials (Section 2, p. 5)○ Enrollment Policy that includes lottery description (Section 2, p. 11)○ Staff capacity for financial management (Section 4, p. 24)○ CMO/ESP information (Section 5, p. 29)• Updated success criteria numbering
April 7, 2021	<ul style="list-style-type: none">• Included success criteria related to existing organizations' years of operation (p. 28)• Added numbering to rubric criteria• Updated model instructions (this page)• Minor formatting changes/typo corrections
August 28, 2020	<ul style="list-style-type: none">• Original

Commented [DL1]: To do: renumber SC and updated SC appendix to match

Local Campus Application Rubric

Instructions for Evaluators:

1. In the [Evaluation Information](#) section, fill in your name, the name of the applicant group, and the name of the proposed school.
2. For each section of the application (sections 2-4 and 5, if applicable), you should do the following during your initial individual analysis of the proposal:
 - a. Highlight the elements of the success criteria that are met in the application and select a score under “Initial Review” for the success criteria (Meets, Partially Meets, or Does not Meet). *Note: a bulleted list of all success criteria can be found in the [appendix](#).*
 - b. Identify any missing or unclear evidence from the application in the “Areas for follow up in capacity interview” column under “Initial Review.” Be sure to include page references where applicable.
 - c. Select a subsection rating (Meets, Partially Meets, Does Not Meet):
 - i. The subsection ratings are included in the rows in gray above the success criteria for that subsection.
 - ii. The subsection rating should align to your success criteria ratings. For example, if there are four success criteria in a subsection, and an applicant only met two of those success criteria, you might select “Partially Meets” for your subsection rating.
3. Complete the [Application Summary Ratings](#) last.
 - a. Select the appropriate Section Summary Rating based on the ratings in each subsection.
 - b. Type a summary of your analysis of each section into the box provided. This should be a paragraph outlining the overall strengths or weaknesses of the application section as a whole. It should summarize your findings and should not be cut and pasted from your subsection analysis. Use this section to identify areas that should be explored during the capacity interview (if the applicant qualifies). Again, reference relevant page numbers.
4. If the applicant receives a score that qualifies them for a capacity interview:
 - a. Use the “After Capacity Interview” columns to provide your final evaluation of that success criteria based on the additional information you learn in the capacity interview.
 - b. Revise your subsection ratings and your [Application Summary Ratings](#) as needed.

Please note that your comments and evidence are as significant as your rating, and there should be clear alignment between the comments you provide and the rating you selected.

Evaluation Information

- Evaluators will use the following criteria to rate applicant responses.
- Ratings should be given based on tangible evidence provided in the application and/or capacity interview.
- Within each section, specific criteria define the expectations for a strong response that “Meets the Standard.” Evaluators will rate responses by applying the following guidance:

Meets the Standard: The response meets all of the criteria described in that section of the rubric. It reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information and evidence that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant’s capacity to carry out the plan effectively.

Partially Meets the Standard: The response meets some of the criteria or lacks detail and/or requires additional information in one or more areas.

Does Not Meet the Standard: The response meets little to none of the criteria described in that section of the rubric, or it is wholly undeveloped or significantly incomplete; demonstrates lack of preparation and/or evidence; is unsuited to the mission of the authorizer or otherwise raises substantial concerns about the viability of the plan or the applicant's ability to carry it out.		
Evaluator Names: Orlando Riddick-HISD/Chief of Strategic Initiatives Office, Jacob Johnson – HISD/Chief of Schools Office-Central Division, Lizzette Cooper-HISD/Chief of Schools Office, Caitlin Butler-HISD/Chief of Staff Office, Lupita Hinojosa- ESC-4	Applicant Organization Name: Houston ISD – Kinder High School for the Visual and Performing Arts Friends	Name of Campus(es): Kinder High School for the Performing and Visual Arts HS Campus Capacity Interview Team: Priscilla Rivas-HSPVA Principal, Alene Coggin-HSPVA Friends Executive Director, Janis Jarosz – HSPVA Friends Board Member, and Frank Angelle – HSPVA Friends Board Member
Application Summary Ratings		
COMPLETE THIS SECTION LAST		
Score Required for Capacity Interview (this will be the same for all applicants): Click or tap here to enter text. Does this applicant qualify for a capacity interview? Yes, the applicant will return for a Capacity Interview for follow-up and review		
Section 2- Academic Plan The academic plan is complete, viable, and appropriate for the campus(es)	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Summary Comments/ Capacity Interview Topics:
Section 3- Governance, Operating Plan, and Capacity The applicant organization has the governance structure, operating plan, and capacity necessary to successfully manage the campus(es)	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Summary Comments/Capacity Interview Topics:
Section 4- Financial Plan The applicant organization has a financial plan that	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Summary Comments/Capacity Interview Topics:

ensures sound financial management of the campus(es)		
Section 5- Existing Partner/Experienced Partner Supplement The applicant organization has a successful track record and, if applicable, a sound ESP management plan	☐ Meets ☐ Partially Meets ☐ Does Not Meet N/A	Summary Comments/Capacity Interview Topics: N/A
Section 2: Academic Plan		
A. The response in this section is complete and cohesive	Meets ☒	Partially Meets ☐ Does Not Meet ☐
Success Criteria	<div>Initial Review</div> <div>After Capacity Interview</div>	
	<div>Score</div> <div>Areas for follow up in capacity interview</div>	<div>Score</div> <div>Comments/Evidence for Final Recommendation</div>
1. Applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet	☒ Meets ☐ Partially Meets ☐ Does Not Meet
2. Applicant included attachments 1 (if applicable), 2, and 3	☐ Meets ☐ Partially Meets ☐ Does Not Meet	☒ Meets ☐ Partially Meets ☐ Does Not Meet
3. The overall academic plan is coherent and aligned with the stated mission and vision	☒ Meets ☐ Partially Meets ☐ Does Not Meet	☒ Meets ☐ Partially Meets ☐ Does Not Meet
4. The overall academic plan is aligned to and likely to meet the needs identified by the district for this campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet	☒ Meets ☐ Partially Meets ☐ Does Not Meet
B. The applicant presented a clear plan to implement high-quality curriculum and effective instruction, and there is compelling justification and rationale for the curriculum and instruction plan	Meets ☒	Partially Meets ☐ Does Not Meet ☐
Success Criteria	Initial Review	After Capacity Interview

	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
5. The applicant has selected a curriculum that is aligned to Texas standards	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
6. The applicant has developed or has a viable plan to develop a scope and sequence for each grade level and/or content area to be used at the school(s)	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
7. There is a plan for selecting and implementing High Quality Instructional Materials, and the applicant included what instructional materials will be used at the campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
8. There is a plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
9. The applicant's framework for instructional design and strategies: <ul style="list-style-type: none"> reflects the needs of the school's target population ensures all students meet or exceed the expectations of Texas state standards 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> promotes critical-thinking skills 				
10. There is a plan to identify and serve students with learning gaps	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
11. There is an appropriate plan to maximize instructional time	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
12. The applicant provided peer-reviewed research that backs up the program OR evidence of their experience with this program that includes metrics that demonstrate it has been successful	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
13. There is an explanation of how this curriculum and instruction framework create a rigorous, engaging, and high-quality educational experience for students that could be reasonably replicated for the student population at the proposed campus(es)	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
14. There is a valid description of why this model is likely to be effective for the anticipated student population at the proposed campus(es) that is compelling and aligned to the needs that the district has identified	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

C. (High Schools Only) The applicant presented an appropriate plan that ensures students meet graduation standards		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
15. The applicant included an attachment with exit standards for graduating students. This attachment: <ul style="list-style-type: none"> Is aligned to state high school graduation standards Includes what students in the last grade served will know and be able to do Includes how the applicant will ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce) 	☒ Meets ☐ Partially Meets ☐ Does Not Meet	Shared an exemplar	☒ Meets ☐ Partially Meets ☐ Does Not Meet	You shared adding the course graduation sequence for an HSPVA student would take and adding that to this section.
16. The applicant described systems and procedures that the school will implement for students at risk of dropping out or not meeting exit standards that are likely to meet the needs of students at the proposed campus(es)	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
D. The applicant provided a plan and demonstrated capacity to serve students in special populations		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	

	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
17. The applicant provided an explanation of evidence from which the projection of anticipated special populations was derived that is reasonable given the district's student population	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
18. The organization or applicant team has experience in fulfilling state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
19. The applicant provided rationale for their understanding of and ongoing capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, emergent bilingual students, and students identified as intellectually gifted	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
20. The applicant included a plan for providing services to students in special education. The plan demonstrates that the applicant will successfully: <ul style="list-style-type: none"> appropriately identify students for special education services 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • serve students in the least-restrictive environment possible • provide appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities • provide the required and appropriate support services as outlined in students' Individualized Education Plans and 504 plans • ensure that students receiving special education services participate in standardized testing 				
<p>21. The applicant included a plan for providing services to emergent bilingual students. The plan demonstrates that the applicant will successfully:</p> <ul style="list-style-type: none"> • employ specific instructional programs, practices, and strategies to ensure academic success and equitable access to the general education curriculum and core academic program for emergent bilingual students 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> monitor and evaluate student progress and success of emergent bilingual students and exit them from services as appropriate include emergent bilingual students in standardized testing include emergent bilingual students in school wide educational, extra-curricular, and culture-building activities 				
22. The applicant included a plan for providing services to students identified as intellectually gifted. The plan demonstrates that the applicant will successfully: <ul style="list-style-type: none"> identify students provide specific instructional programs, practices, and strategies aligned to the needs of these students 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
E. The applicant provided a sound plan for student recruitment and enrollment		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
23. The applicant provided a student recruitment and marketing plan that includes safeguards for equal inclusion of all interested	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

students and families, including:				
<ul style="list-style-type: none"> those in poverty students who have struggled academically students with disabilities, and other youth at risk of academic failure 				
24. The applicant attached an Enrollment Policy that complies with state law and includes a lottery policy if more students choose to enroll at the campus than can accommodate	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
25. The applicant's Enrollment Policy includes safeguards or policies that ensure that the school will be open to all eligible students	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
F. The applicant provided a compelling plan for creating a positive school culture		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
26. The applicant described a vision for the culture of the school(s) that is aligned to the needs the district identified in its Call for Quality Schools	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
27. The applicant's vision for the school: <ul style="list-style-type: none"> promotes high expectations 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • will reasonably establish a positive and safe academic environment • will reasonably create shared ownership of intellectual and social development for all students, including those with special needs, ELs, and students at risk of academic failure 				
<p>28. The applicant included a plan for establishing the intended culture. This plan includes processes and procedures to:</p> <ul style="list-style-type: none"> • develop a common understanding of the intended school culture among staff and students • identify how the intended culture is put in practice and made evident in the daily life of the school • regularly assess and measure progress on student and staff experiences and course-correct when expected progress is not being made 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>29. The applicant included a plan for family engagement. This plan:</p> <ul style="list-style-type: none"> • includes methods the applicant will use to 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>create an inclusive and welcoming environment</p> <ul style="list-style-type: none"> is likely to engage families in positive, constructive, and personalized ways 				
<p>30. The applicant included a plan for providing student support services (e.g., counseling, mentoring, external service referrals) that includes:</p> <ul style="list-style-type: none"> a program to proactively teach mental health and wellness skills to all students a process for staff to meet frequently to identify and monitor individual student needs a process to identify support service providers and to connect students with the support services (e.g., counseling, mentoring, external service referrals) that address their needs 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>31. The applicant included the systems and processes the school will use for tracking discipline referrals and interventions, including how they will identify trends and adapt activities accordingly</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>32. The applicant attached the student discipline policy/code of conduct for the proposed campus(es). This policy or code includes:</p> <ul style="list-style-type: none"> • appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture • legally sound policies for student discipline, suspension, and expulsion • protection of students' rights to due process 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
G. The applicant provided an assessment and evaluation plan that demonstrates their ability to track student progress		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
<p>33. The applicant included annual student performance goals that:</p> <ul style="list-style-type: none"> • include targets aligned with the state accountability system • meet the needs/desired outcomes the district wants to achieve with this partnership 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>34. The applicant included a plan (including the meeting structures and frequency) to</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

implement and interpret interim assessments that measure academic progress toward these annual goals throughout the school year				
<p>35. The applicant included a plan and system for collecting and analyzing student academic achievement data that includes:</p> <ul style="list-style-type: none"> • methods to report data to the school community that ensure that stakeholders have equal access to the information • processes and procedures to use the data to refine and improve instruction that include: <ul style="list-style-type: none"> ○ dedicated, scheduled time to provide training and support to school leadership and teachers in the use of data to improve instruction ○ qualified personnel to provide this training and support for school leaders and teachers 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
36. The applicant included corrective actions that they will take if they fall short of the academic goals stated in this section.	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

There is a plan to take corrective action for both annual and interim goals that includes:				
<ul style="list-style-type: none"> a clear explanation of what would trigger such actions who would implement the corrective actions 				
Section 3: Governance, Operating Plan, and Capacity				
H. The response in this section is complete and cohesive		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
37. The applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
38. The applicant included attachments 4-9	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
39. The overall governance structure and operations plan is:	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<ul style="list-style-type: none"> coherent aligned with the stated mission and vision aligned with the academic plan (section 2) aligned with the finance plan (section 4) 				
40. The overall governance plan is aligned to and likely to meet the needs identified by the district for this campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

I. The applicant organization is an eligible entity and includes sufficient staff to manage the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
41. The attached organizational chart indicates that the organization has already employed staff that will be engaged in daily, on-site school management routines	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
42. The daily responsibilities described in the chart include daily on-site school management routines that match the needs of the campus	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
43. The organization is one of the following eligible entities: <ul style="list-style-type: none"> • open-enrollment charter school • an institution of higher education as defined under Section 61.003 of the Texas Education Code (TEC),] • a private or independent institution of higher education as defined under TEC Section 61.003, or • an organization that is exempt from taxation under Section 501(c)(3) of the Internal Revenue Code 	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	

J. The applicant organization's board is independent of the district, meets legal requirements, and includes qualified members		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
44. The partner organization board is made up of at least three members	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
45. The partner organization board does not include any members of the district's board, the district superintendent, OR any members that are district employees involved in the selection or oversight of the district charter partnership	☒ Meets ☐ Does Not Meet		☒ Meets ☐ Does Not Meet	
46. The bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances provided by the potential partner assure the current and ongoing independence of the partner board from the district board	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
47. The board member information sheets and resumes for each proposed board member demonstrate that, collectively, the board members have demonstrated experience and success in:	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> the implementation and oversight of education programs financial oversight of schools and/or non-profit organizations implementing legal requirements for schools and/or non-profit organizations community engagement 				
<p>48. The applicant included a plan to grow and/or sustain board membership, including:</p> <ul style="list-style-type: none"> a description of the education, finance, law, and community engagement and other qualifications that current or future board members must possess a plan to recruit board members with the necessary experiences in education, finance, law, and community engagement described in the preceding bullet point proposed training requirements and an orientation plan for new board members proposed ongoing training requirements for board members that will ensure their continued 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

ability to govern charter campuses within the district				
49. The applicant described how the board will evaluate the success of the school(s) and school leader(s), including: <ul style="list-style-type: none"> the criteria by which the board will evaluate the school(s) and leader(s) meetings that occur frequently enough for the board to have an understanding of the school and leader's performance the roles and responsibilities of any standing committees 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
K. The applicant team has the necessary experience and capacity to manage the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
50. The applicant team is comprised of members with experience and measurable success in school leadership, administration, and governance	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
51. The applicant team is comprised of members with experience and measurable success in implementing systems for curriculum, instruction, and assessment	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

52. The applicant team is comprised of members with experience and measurable success in performance management	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
53. The applicant team is composed of members with experience and measurable success in parent and community engagement	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
54. The proposed school leader has experience in and demonstrated ability to design, launch, and lead a school and implement the specific educational program being proposed OR the board has a plan (with appropriate timeline) to recruit and retain a leader with the ability to implement the specific educational program being proposed	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
55. The applicant provided measurable performance expectations for the school leader that are: <ul style="list-style-type: none"> aligned to the mission of the school aligned to a trajectory of improved student outcomes for the specific campus or campuses to be operated by the organization appropriate for both the school launch in the first year of operation to 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

sustainability of improved outcomes in future years				
L. The applicant has a clear plan to recruit and retain quality staff at the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
56. The applicant's recruitment and hiring strategy includes: <ul style="list-style-type: none"> • criteria and protocols for hiring for all campus roles • predetermined selection criteria that demonstrate high standards • selection criteria aligned to the mission and academic program the school will offer • a hiring protocol and timeline that ensure that the school is fully staffed by July 1 of each year 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
57. The applicant's staff development and retention plan includes: <ul style="list-style-type: none"> • an induction program that is tailored to any unique or particularly challenging aspects of the educational program described in Section 2 • the method the applicant will use to evaluate teacher performance and 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>growth, including the evaluation tools and processes to be used</p> <ul style="list-style-type: none"> the method, resources, and timeline that the applicant will use to support school staff personnel with demonstrated experience and qualifications to provide professional development and facilitate adult learning how the applicant will identify and retain high-performing staff 				
<p>58. The applicant described a process for remedying unsatisfactory leadership and/or teacher performance that includes:</p> <ul style="list-style-type: none"> how underperforming staff are identified the steps and documentation that the applicant will take and collect to remedy the performance if the school staff will remain district employees, how the applicant will work with the district to change the assignment of the staff 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
M. The applicant has a valid facilities plan	Meets ☒		Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	

	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
59. The application identifies an appropriate and viable proposed school facility, or the application includes a facilities plan. If the application includes a facilities plan, the plan includes: <ul style="list-style-type: none"> the timeline for identifying the facility how the facility will be financed how the applicant will renovate and/or ensure code compliance for a facility how the facilities plan will meet the requirements of the educational program and anticipated student population 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
Section 4: Financial Plan				
N. The response in this section is complete and cohesive		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
60. The applicant responded to all questions in this section	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
61. The applicant included attachment 10	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

62. The overall financial plan is: <ul style="list-style-type: none"> coherent aligned with the stated mission and vision aligned with the academic plan (section 2) aligned with the governance and operations plan (section 3) 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
O. The applicant demonstrated that the organization has the capacity, processes, and personnel necessary to meet the financial needs of managing the campus(es)		Meets ☒	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
63. The applicant's description of the organization's systems, policies, and processes for financial planning, accounting, purchasing, and payroll that are aligned with and will allow the school to meet financial accountability requirements	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
64. The applicant organization has (or has plans to hire) staff the with necessary qualifications to manage the organization's financial systems, policies, and processes	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
65. The application describes: <ul style="list-style-type: none"> the organization's internal controls that 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>meet the standard outlined in the Financial Accountability System Resource Guide (Module 2: Special Supplement – Charter Schools)</p> <ul style="list-style-type: none"> the applicant's knowledge of and ability to meet financial reporting requirements how the applicant will conduct independent annual financial and administrative audits that meet district requirements 				
<p>66. The financial plan describes roles and responsibilities among the administration and governing board regarding school finance that align with the internal controls described in the preceding criteria</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>67. The financial plan includes the methods the applicant will employ to publicly adopt the school's budget and disseminate its annual audit and an annual report</p>	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
<p>68. The operating budget and narrative include reasonable:</p> <ul style="list-style-type: none"> grant/fundraising assumptions, amount and sources of all anticipated funds, property, or other 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	

resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable), and				
<ul style="list-style-type: none"> projected cost to implement the academic model described in this application 				
69. The organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated includes: <ul style="list-style-type: none"> how the organization will identify the specific areas of financial weakness what corrective actions the organization will take to remedy specific areas of financial weakness and/or how a corrective action plan will be developed how the organization will ensure a contingency or corrective action plan is successfully implemented 	☒ Meets ☐ Partially Meets ☐ Does Not Meet		☒ Meets ☐ Partially Meets ☐ Does Not Meet	
Section 5: Existing Partner/Experienced Partner Supplement N/A				
P. The response in this section is complete and cohesive		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation

70. The applicant responded to all questions in this section	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
71. The applicant included supplemental attachments 1 and 2, and supplemental attachment 3 (if applicable)	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
72. The supplemental information demonstrates the organization has experience and success in implementing the model described in the rest of the application	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
Q. The applicant has demonstrated a successful academic and financial track record		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
73. The applicant provided evidence of measurable success in: <ul style="list-style-type: none"> • academic success • serving populations similar to the population the applicant intends to serve • successful management of non-academic school functions (e.g., back-office services, school operations, extracurricular programs) 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
74. The applicant's independent financial audit report and its most recent annual report of the	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

<p>experienced partner applicant or ESP/CMO:</p> <ul style="list-style-type: none"> • demonstrates the financial health of the organization • provides reasonable assurance that the organization will maintain this financial health when operating the proposed campus(es) in this district 				
<p>75. The applicant does not have a history of charter revocations, non-renewals, withdrawals, or failures to open</p>	☐ Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Does Not Meet	
<p>76. If the applicant is partnering with an F rated campus, the applicant has:</p> <ul style="list-style-type: none"> • Been in existence for at least three years prior to undertaking the management of the district campus • Managed multiple campuses for multiple years • Has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses 		N/A		

R. If applicable, the applicant provided a clear Education Service Provider (ESP) or Charter Management Organization (CMO) plan		Meets ☐	Partially Meets ☐	Does Not Meet ☐
Success Criteria	Initial Review		After Capacity Interview	
	Score	Areas for follow up in capacity interview	Score	Comments/Evidence for Final Recommendation
77. The management agreement between the ESP or CMO and the applicant organization includes: <ul style="list-style-type: none"> • a detailed description of the roles and responsibilities of the ESP or CMO • a detailed explanation of the scope of services and costs of all resources to be provided by the ESP or CMO • a detailed description of the oversight and evaluation methods that the board will use to oversee the ESP or CMO, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP's or CMO's progress toward achieving agreed-upon goals 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

<ul style="list-style-type: none"> • a detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory • a detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP or CMO and the schedule on which the ESP or CMO will receive compensation • a detailed explanation of the financial responsibilities of the ESP or CMO, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP or CMO can make without obtaining board approval, and what reports the ESP or CMO will submit to the board on financial performance and on what schedule 				
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<ul style="list-style-type: none"> • a detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP or CMO and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed • a detailed description of the grounds for which the ESP/CMO or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause • an explanation and justification of any indemnification provisions in the event of default or breach by either party 				
78. The applicant included a plan for the operation of the	☐ Meets	N/A	☐ Meets	

school in the case that the management agreement is terminated that includes how this plan would be enforced and carried out	☐ Partially Meets ☐ Does Not Meet		☐ Partially Meets ☐ Does Not Meet	
79. The applicant included: <ul style="list-style-type: none"> assurance that the board is independent from the ESP or CMO and self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed ESP or any affiliated business entities evidence of the board's independence 	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
80. The applicant included a clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP/CMO supervisory responsibilities	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	
81. The applicant included a detailed explanation and	☐ Meets	N/A	☐ Meets	

compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement	☐ Partially Meets ☐ Does Not Meet		☐ Partially Meets ☐ Does Not Meet	
82. The applicant included a detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused by the school	☐ Meets ☐ Partially Meets ☐ Does Not Meet	N/A	☐ Meets ☐ Partially Meets ☐ Does Not Meet	

Section 2: Academic Plan

A. The response in this section is complete and cohesive

1. Applicant responded to all questions in this section
2. Applicant included attachments 1 (if applicable), 2, and 3
3. The overall academic plan is coherent and aligned with the stated mission and vision
4. The overall academic plan is aligned to and likely to meet the needs identified by the district for this campus

B. The applicant presented a clear plan to implement high-quality curriculum and effective instruction, and there is compelling justification and rationale for the curriculum and instruction plan

5. The applicant has selected a curriculum that is aligned to Texas standards
6. The applicant has developed or has a viable plan to develop a scope and sequence for each grade level and/or content area to be used at the school(s)
7. There is a plan for selecting and implementing High Quality Instructional Materials, and the applicant included what instructional materials will be used at the campus
8. There is a plan and calendar for providing ongoing professional development to all instructional staff at the campus related to implementation of curriculum and instructional materials
9. The applicant's framework for instructional design and strategies:
 - reflects the needs of the school's target population
 - ensures all students meet or exceed the expectations of Texas state standards
 - promotes critical-thinking skills
10. There is a plan to identify and serve students with learning gaps
11. There is an appropriate plan to maximize instructional time
12. The applicant provided peer-reviewed research that backs up the program OR evidence of their experience with this program that includes metrics that demonstrate it has been successful
13. There is an explanation of how this curriculum and instruction framework create a rigorous, engaging, and high-quality educational experience for students that could be reasonably replicated for the student population at the proposed campus(es)
14. There is a valid description of why this model is likely to be effective for the anticipated student population at the proposed campus(es) that is compelling and aligned to the needs that the district has identified

C. (High Schools Only) The applicant presented an appropriate plan that ensures students meet graduation standards

15. The applicant included an attachment with exit standards for graduating students. This attachment:
 - Is aligned to [state high school graduation standards](#)
 - Includes what students in the last grade served will know and be able to do
 - Includes how the applicant will ensure student readiness for college or other post-secondary opportunities (e.g., trade school, military service, or entering the workforce)

16. The applicant described systems and procedures that the school will implement for students at risk of dropping out or not meeting exit standards that are likely to meet the needs of students at the proposed campus(es)

D. The applicant provided a plan and demonstrated capacity to serve students in special populations

17. The applicant provided an explanation of evidence from which the projection of anticipated special populations was derived that is reasonable given the district's student population
18. The organization or applicant team has experience in fulfilling state and federal obligations and requirements pertaining to students with disabilities, ELs, and students identified as intellectually gifted
19. The applicant provided rationale for their understanding of and ongoing capacity to fulfill state and federal obligations and requirements pertaining to students with disabilities, ELs, and students identified as intellectually gifted
20. The applicant included a plan for providing services to students in special education. The plan demonstrates that the applicant will successfully:
- appropriately identify students for special education services
 - serve students in the least-restrictive environment possible
 - provide appropriate access to the general education curriculum and schoolwide educational, extra-curricular, and culture-building activities
 - provide the required and appropriate support services as outlined in students' Individualized Education Plans and 504 plans
 - ensure that students receiving special education services participate in standardized testing
21. The applicant included a plan for providing services to English Learners (ELs). The plan demonstrates that the applicant will successfully:
- employ specific instructional programs, practices, and strategies to ensure academic success and equitable access to the general education curriculum and core academic program for ELs
 - monitor and evaluate student progress and success of ELs and exit them from services as appropriate
 - include ELs in standardized testing
 - include ELs in school wide educational, extra-curricular, and culture-building activities
22. The applicant included a plan for providing services to students identified as intellectually gifted. The plan demonstrates that the applicant will successfully:
- identify students
 - provide specific instructional programs, practices, and strategies aligned to the needs of these students

E. The applicant provided a sound plan for student recruitment and enrollment

23. The applicant provided a student recruitment and marketing plan that includes safeguards for equal inclusion of all interested students and families, including:
- those in poverty
 - students who have struggled academically
 - students with disabilities, and
 - other youth at risk of academic failure
24. The applicant attached an Enrollment Policy that complies with [state law](#) and includes a lottery policy if more students choose to enroll at the campus than can accommodated
25. The applicant's Enrollment Policy includes safeguards or policies that ensure that the school will be open to all eligible students

F. The applicant provided a compelling plan for creating a positive school culture

26. The applicant described a vision for the culture of the school(s) that is aligned to the needs the district identified in its Call for Quality Schools
27. The applicant's vision for the school:
- promotes high expectations
 - will reasonably establish a positive and safe academic environment
 - will reasonably create shared ownership of intellectual and social development for all students, including those with special needs, ELs, and students at risk of academic failure
28. The applicant included a plan for establishing the intended culture. This plan includes processes and procedures to:
- develop a common understanding of the intended school culture among staff and students
 - identify how the intended culture is put in practice and made evident in the daily life of the school
 - regularly assess and measure progress on student and staff experiences and course-correct when expected progress is not being made
29. The applicant included a plan for family engagement. This plan:
- includes methods the applicant will use to create an inclusive and welcoming environment
 - is likely to engage families in positive, constructive, and personalized ways
30. The applicant included a plan for providing student support services (e.g., counseling, mentoring, external service referrals) that includes:
- a program to proactively teach mental health and wellness skills to all students
 - a process for staff to meet frequently to identify and monitor individual student needs
 - a process to identify support service providers and to connect students with the support services (e.g., counseling, mentoring, external service referrals) that address their needs
31. The applicant included the systems and processes the school will use for tracking discipline referrals and interventions, including how they will identify trends and adapt activities accordingly
32. The applicant attached the student discipline policy/code of conduct for the proposed campus(es). This policy or code includes:
- appropriate and effective strategies to support a safe, orderly school climate and fulfillment of educational goals, promoting a strong school culture
 - legally sound policies for student discipline, suspension, and expulsion
 - protection of students' rights to due process

G. The applicant provided an assessment and evaluation plan that demonstrates their ability to track student progress

33. The applicant included annual student performance goals that:
- include targets aligned with the state accountability system
 - meet the needs/desired outcomes the district wants to achieve with this partnership
34. The applicant included a plan (including the meeting structures and frequency) to implement and interpret interim assessments that measure academic progress toward these annual goals throughout the school year
35. The applicant included a plan and system for collecting and analyzing student academic achievement data that includes:
- methods to report data to the school community that ensure that stakeholders have equal access to the information

- processes and procedures to use the data to refine and improve instruction that include:
 - dedicated, scheduled time to provide training and support to school leadership and teachers in the use of data to improve instruction
 - qualified personnel to provide this training and support for school leaders and teachers
36. The applicant included corrective actions that they will take if they fall short of the academic goals stated in this section.
- There is a plan to take corrective action for both annual and interim goals that includes:
- a clear explanation of what would trigger such actions
 - who would implement the corrective actions

Section 3: Governance, Operating Plan, and Capacity

H. The response in this section is complete and cohesive

37. The applicant responded to all questions in this section
38. The applicant included attachments 4-9
39. The overall governance structure and operations plan is:
- coherent
 - aligned with the stated mission and vision
 - aligned with the academic plan (section 2)
 - aligned with the finance plan (section 4)
40. The overall governance plan is aligned to and likely to meet the needs identified by the district for this campus

I. The applicant organization is an eligible entity and includes sufficient staff to manage the campus(es)

41. The attached organizational chart indicates that the organization has already employed staff that will be engaged in daily, on-site school management routines
42. The daily responsibilities described in the chart include daily, on-site school management routines that match the needs of the campus
43. The organization is one of the following:
- open-enrollment charter school
 - an institution of higher education as defined under Section 61.003 of the Texas Education Code (TEC),]
 - a private or independent institution of higher education as defined under TEC Section 61.003, or
 - an organization that is exempt from taxation under Section 501(c)(3) of the Internal Revenue Code

J. The applicant organization's board is independent of the district, meets legal requirements, and includes qualified members

44. The partner organization board is made up of at least three members
45. The partner organization board does not include any members of the district's board, the district superintendent, OR any members that are district employees involved in the selection or oversight of the district charter partnership
46. The bylaws, proposed Code of Ethics and Conflict of Interest policy/procedures, and completed and signed statements of assurances provided by the potential partner assure the current and ongoing independence of the partner board from the district board

47. The board member information sheets and resumes for each proposed board member demonstrate that, collectively, the board members have demonstrated experience and success in:
- the implementation and oversight of education programs
 - financial oversight of schools and/or non-profit organizations
 - implementing legal requirements for schools and/or non-profit organizations
 - community engagement
48. The applicant included a plan to grow and/or sustain board membership, including:
- a description of the education, finance, law, and community engagement and other qualifications that current or future board members must possess
 - a plan to recruit board members with the necessary experiences in education, finance, law, and community engagement described in the preceding bullet point
 - proposed training requirements and an orientation plan for new board members
 - proposed ongoing training requirements for board members that will ensure their continued ability to govern charter campuses within the district
49. The applicant described how the board will evaluate the success of the school(s) and school leader(s), including:
- the criteria by which the board will evaluate the school(s) and leader(s)
 - meetings that occur frequently enough for the board to have an understanding of the school and leader's performance
 - the roles and responsibilities of any standing committees

K. The applicant team has the necessary experience and capacity to manage the campus(es)

50. The applicant team is comprised of members with experience and measurable success in school leadership, administration, and governance
51. The applicant team is comprised of members with experience and measurable success in implementing systems for curriculum, instruction, and assessment
52. The applicant team is comprised of members with experience and measurable success in performance management
53. The applicant team is composed of members with experience and measurable success in parent and community engagement
54. The proposed school leader has experience in and demonstrated ability to design, launch, and lead a school and implement the specific educational program being proposed OR the board has a plan (with appropriate timeline) to recruit and retain a leader with the ability to implement the specific educational program being proposed
55. The applicant provided measurable performance expectations for the school leader that are:
- aligned to the mission of the school
 - aligned to a trajectory of improved student outcomes for the specific campus or campuses to be operated by the organization
 - appropriate for both the school launch in the first year of operation to sustainability of improved outcomes in future years

L. The applicant has a clear plan to recruit and retain quality staff at the campus(es)

56. The applicant's recruitment and hiring strategy includes:
- criteria and protocols for hiring for all campus roles
 - predetermined selection criteria that demonstrate high standards

- selection criteria aligned to the mission and academic program the school will offer
 - a hiring protocol and timeline that ensure that the school is fully staffed by July 1 of each year
57. The applicant's staff development and retention plan includes:
- an induction program that is tailored to any unique or particularly challenging aspects of the educational program described in Section 2
 - the method the applicant will use to evaluate teacher performance and growth, including the evaluation tools and processes to be used
 - the method, resources, and timeline that the applicant will use to support school staff
 - personnel with demonstrated experience and qualifications to provide professional development and facilitate adult learning
 - how the applicant will identify and retain high-performing staff
58. The applicant described a process for remedying unsatisfactory leadership and/or teacher performance that includes:
- how underperforming staff are identified
 - the steps and documentation that the applicant will take and collect to remedy the performance
 - if the school staff will remain district employees, how the applicant will work with the district to change the assignment of the staff

M. The applicant has a valid facilities plan

59. The application identifies an appropriate and viable proposed school facility, or the application includes a facilities plan. If the application includes a facilities plan, the plan includes:
- the timeline for identifying the facility
 - how the facility will be financed
 - how the applicant will renovate and/or ensure code compliance for a facility
 - how the facilities plan will meet the requirements of the educational program and anticipated student population

Section 4: Financial Plan

N. The response in this section is complete and cohesive

60. The applicant responded to all questions in this section
61. The applicant included attachment 10
62. The overall financial plan is:
- coherent
 - aligned with the stated mission and vision
 - aligned with the academic plan (section 2)
 - aligned with the governance and operations plan (section 3)

O. The applicant demonstrated that the organization has the capacity, processes, and personnel necessary to meet the financial needs of managing the campus(es)

63. The applicant's description of the organization's systems, policies, and processes for financial planning, accounting, purchasing, and payroll that are aligned with and will allow the school to meet [financial accountability](#) requirements

64. The applicant organization has (or has plans to hire) staff the with necessary qualifications to manage the organization's financial systems, policies, and processes
65. The application describes:
- the organization's internal controls that meet the standard outlined in the Financial Accountability System Resource Guide ([Module 2: Special Supplement – Charter Schools](#))
 - the applicant's knowledge of and ability to meet financial reporting requirements
 - how the applicant will conduct independent annual financial and administrative audits that meet district requirements
66. The financial plan describes roles and responsibilities among the administration and governing board regarding school finance that align with the internal controls described in the preceding criteria
67. The financial plan includes the methods that the applicant will employ to publicly adopt the school's budget and disseminate its annual audit and an annual report
68. The operating budget and narrative include reasonable:
- grant/fundraising assumptions,
 - amount and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable), and
 - projected cost to implement the academic model described in this application
69. The organization's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated includes:
- how the organization will identify the specific areas of financial weakness
 - what corrective actions the organization will take to remedy specific areas of financial weakness and/or how a corrective action plan will be developed
 - how the organization will ensure that a contingency or corrective action plan is successfully implemented

Section 5: Existing Partner/Experienced Partner Supplement

P. The response in this section is complete and cohesive

70. The applicant responded to all questions in this section
71. The applicant included supplemental attachments 1 and 2, and supplemental attachment 3 (if applicable)
72. The supplemental information demonstrates that the organization has experience and success in implementing the model described in the rest of the application

Q. The applicant has demonstrated a successful academic and financial track record

73. The applicant provided evidence of measurable success in:
- academic success
 - serving populations similar to the population that the applicant intends to serve
 - successful management of non-academic school functions (e.g., back- office services, school operations, extracurricular programs)
74. The applicant's independent financial audit report and its most recent annual report of the experienced partner applicant or ESP:

- demonstrates the financial health of the organization
 - provides reasonable assurance that the organization will maintain this financial health when operating the proposed campus(es) in this district
75. The applicant does not have a history of charter revocations, non-renewals, withdrawals, or failures to open
76. If the applicant is partnering with an F rated campus, the applicant has:
- Been in existence for at least three years prior to undertaking the management of the district campus
 - Managed multiple campuses for multiple years
 - Has a track record of managing campuses to academic success or has significantly improved the academic performance of the campuses
- R. If applicable, the applicant provided a clear Education Service Provider (ESP) or Charter Management Organization (CMO) plan**
77. The management agreement between the ESP/CMO and the applicant organization includes:
- a detailed description of the roles and responsibilities of the ESP/CMO
 - a detailed explanation of the scope of services and costs of all resources to be provided by the ESP/CMO
 - a detailed description of the oversight and evaluation methods that the board will use to oversee the ESP/CMO, including schoolwide and student achievement results which the management organization is responsible for achieving, and a description of how often, and in what ways, the board will review and evaluate the ESP/CMO's progress toward achieving agreed-upon goals
 - a detailed explanation of the conditions, standards, and procedures for board intervention if the management organization's performance is deemed unsatisfactory
 - a detailed explanation of the compensation structure, including clear identification of all fees to be paid to the ESP/CMO and the schedule on which the ESP/CMO will receive compensation
 - a detailed explanation of the financial responsibilities of the ESP/CMO, including the ownership of items purchased with public funds, including which operating and capital expenditures each party will be responsible for assuming, what types of spending decisions the ESP/CMO can make without obtaining board approval, and what reports the ESP/CMO will submit to the board on financial performance and on what schedule
 - a detailed description of the duration, renewal, and termination of the management agreement, including how often the management agreement may be renewed, the conditions that both the ESP/CMO and the school must satisfy for the management agreement to be renewed, and the procedures for determining whether the management agreement will be renewed
 - a detailed description of the grounds for which the ESP/CMO or the school can terminate the management agreement for cause, including provisions for notice to the other party and any conditions under which either party may terminate the management agreement without cause
 - an explanation and justification of any indemnification provisions in the event of default or breach by either party
78. The applicant included a plan for the operation of the school in the case that the management agreement is terminated that includes how this plan would be enforced and carried out
79. The applicant included:
- assurance that the board is independent from the ESP/CMO and self-governing, including separate legal representation of each and arm's-length negotiating and no existing or potential conflicts of interest between the school's governing board and proposed ESP/CMO or any affiliated business entities
 - evidence of the board's independence
80. The applicant included a clear and detailed explanation of the supervisory responsibilities of the ESP/CMO (if any), including which school employees the ESP/CMO will supervise, how the ESP/CMO will supervise these employees, and how the charter school board will oversee the ESP/CMO supervisory responsibilities

81. The applicant included a detailed explanation and compelling justification of any lease, promissory notes, or other negotiable instruments, any lease-purchase agreements or other financing relationships with the ESP/CMO, including evidence that such agreements are separately documented and not part of or incorporated in the ESP/CMO agreement
82. The applicant included a detailed explanation and compelling justification of any loans, grants, or investments made between the ESP/CMO and the school, including an explanation and justification of how any such loans, grants, or investments may be initiated, repaid, and refused by the school