

**Appendix 17:
Merger Application**

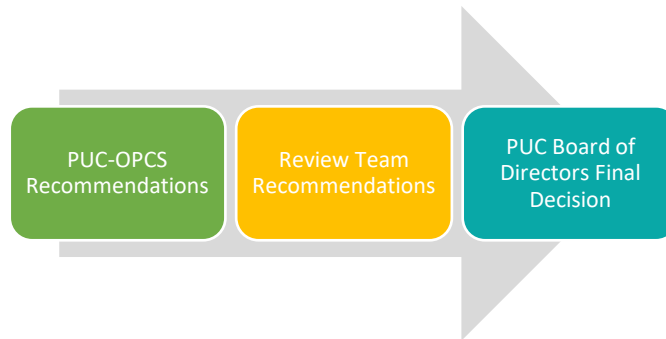
Merger Application

Updated: August 2016

This application is for PUC authorized charter schools that are considering merging with another school.

Consistent with Pillsbury United Communities Office of Public Charter Schools (PUC-OPCS) vision and school portfolio, PUC-OPCS amends charter contract for the purposes of merging charter schools that align with the vision, mission, and values of PUC-OPCS. Additionally, PUC-OPCS holds all of its schools to a standard expectation that all students demonstrate positive growth towards state proficiency. Additionally, a merger must demonstrate fiscal responsibility and responsible governance.

PUC-OPCS will collaborate with both schools in the merger to determine an appropriate timeline for that will not interrupt with school operations and student learning. The decision period is generally a 6-8 week process that will result in an official written communication to the school.



The request will initially be reviewed by PUC-OPCS. A team of reviewers consisting of individuals from the PUC-OPCS and/or Advisory Council will review all information gathered from the school to make a determination regarding school merger. Recommendations from this review committee will be reviewed by PUC-OPCS staff and presented to the PUC Board of Directors for a final decision on whether or not to amend the current charter contract to reflect a merge.

Application Guidelines:

- Submit completed application electronically or mail by assigned date to Office of Public Charter Schools
- Include a table of contents
- Include page numbers, header or footer with school name and page numbers.
- All attachments should be clearly labeled.

Upon review of the application, if PUC-OPCS find that items are missing the school will be contacted and given 3 days to provide the missing content.

A complete merger application includes the following components:

- 1) Mission/ Vision/ Strategy
 - a. Provide the top rationales for merging the two charter schools.
 - i. Which of the above rationales directly impact increasing student outcomes? Expand upon as applicable.
 - ii. Which of the rationales provided in question 1, positively impact the existing charter district (the PUC Authorized LEA)? Expand as applicable.
 - b. How does this merger fit within your existing mission/ vision/ strategic plan?

- 2) Outcomes
 - a. State the modification(s) the school board would like to the current contract. Include edits to the academic and non-academic goals which includes progress monitors of the expansion and/or student achievement in the merged site.
 - b. What are the expected academic outcomes of the proposed merger?
 - c. Provide the added value that the merging school will bring.
 - d. Provide any adaptations necessary for your charter contract academic and non-academic goals.
 - e. What percentage of students currently enrolled (in both schools) do you expect to retain through this merger?
- 3) School Culture
 - a. List the ways you have involved parents/ students in the merging decision.
 - b. How will parents/ students (of both schools) be notified of the merger? If applicable, provide a copy of the notification.
 - c. What is the communication / plan to integrate new staff and students?
 - d. Explain the overall impact on school culture (at the school and district level).
- 4) Operations
 - a. What is the timeline, outline, and details for completing statutory requirements of the merger?
 - b. What decisions still need to be made about the merger (i.e. facility, staff retention, transportation, food services, and curriculum)? How will these decisions be made and who are the decision makers?
 - c. Describe the educational model of the newly merged program.
 - d. How will teachers/ staff be hired and on-boarded? If less than 50% of staff is retained of the merging school, provide rationale.
- 5) Governance
 - a. Describe how the board was involved in this decision. Provide a letter of support from the charter school board chair. Attach board minutes approving the merger.
 - b. How will the board of directors / administrators oversee the merging activities?
 - c. Provide an organizational chart of the merged bodies (including governing board).
 - d. Is the proposed merging school in a closure process? Outline the communication regarding the closure process and decision. How are the concerns of the outgoing authorizer mitigated through merging?
- 6) Finances
 - a. Provide specific details and data as to the use of additional resources (including financial) obtained.
 - b. Describe the transfer of financial responsibilities.
 - c. Provide an updated budget following the merger.
- 7) Application must be signed by the Charter School Leader and the School Board Chair.

Merger Application – Signature Page

Board Chair

Signature _____ Date _____

Printed _____

Charter School Leader

Signature _____ Date _____

Printed _____



Merger Application Evaluation

This portion is filled out by the evaluators reviewing the expansion application. No information is necessary from the charter school applicant.

Directions to Evaluator: Check to see if the following are included in the merger application. If something is missing, indicate so.

- Current student academic data
- Description of student projections and how they will be met
- Description of curriculum and evaluation for additional grades
- Description of organizational structure, including roles, responsibilities, and need of additional staff
- Description of facility capacity to accommodate additional space needs
- Detailed budget addressing financial changes over time as a result of the expansion
- Description of how the expansion will positively affect student achievement
- Application signed by the Charter School Leader and the School Board Chair

Any additional documents/ information needed prior to the final decision: [Click here to enter text.](#)

Directions to Evaluator: Select Satisfactory or Unsatisfactory for each category. Include comments where applicable.

Plan aligns with PUC-OPCS mission, vision, values, and strategic goals? [Choose an item.](#)

Comments: [Click here to enter text.](#)

Plan is founded in realistic enrollment and budget projections? [Choose an item.](#)

Comments: [Click here to enter text.](#)

Plan demonstrates realistic, positive impact on student achievement? [Choose an item.](#)

Comments: [Click here to enter text.](#)

Plan demonstrates overall benefit to community, families, and students? [Choose an item.](#)

Comment: [Click here to enter text.](#)

Application Status: [Choose an item.](#)

Comments: [Click here to enter text.](#)