

# Charter Proposal Review Process

## Fact Sheet

### What is the charter proposal review process?

The Charter Proposal Review Process is a structured framework designed to evaluate the feasibility and strategic alignment of charter school proposals. It requires charter schools to submit detailed plans that address all project aspects; however, site details are not a mandatory inclusion. This ensures that project readiness is established, and proposals are well-positioned to proceed when an appropriate site becomes available.

### Purpose of the charter proposal review process

The objectives of this process include:

- Streamlining process to establish a consistent methodology for evaluating charter school proposals;
- Enhancing agility to enable Alberta Education to respond quickly when a viable site becomes available, without delays caused by incomplete project details;
- Improving budget forecasting to allow for accurate budget planning by projecting costs based on comprehensive proposals, independent of site-specific variations; and
- Promoting financial responsibility to mitigate ad hoc requests for site purchases by requiring robust, forward-thinking project proposals.

### Overview of the charter school planning cycle

- Proposals are evaluated upon receipt through a standardized process, scored based on a Minister-approved evaluation matrix, and identified for Preliminary Endorsement.
- The site selection process will be a collaborative effort between the charter school, Alberta Education, and Alberta Infrastructure to ensure alignment with strategic priorities and efficient use of resources.
- Once paired, the proposal is refined to include site specific information and is approved ad hoc by Treasury Board and Finance.

### Charter proposal evaluation process

#### 1. Submission of proposal

Charter schools are required to submit applications that describe how their capital needs relate to the charter's educational programming, demographic needs, and operational plans. These applications must outline:

- Projected enrolment and general geographic area;
- Educational and curriculum goals, and how those goals can be supported through investments into the facility;
- Space and facility requirements, particularly if specialized space is required to meet the charter mandate; and
- Preliminary budgets.

#### 2. Data gathering and review

Education evaluates submissions for completeness and alignment with requirements. Proposals that lack critical information will be returned with feedback for revision.

Capital Planning may also request feedback on proposals from technical experts in Alberta Education's Field Services, Fiscal Oversight, and Program Supports and Services, as well as input from Alberta Infrastructure.

### 3. Scoring

Proposals are scored on metrics such as health and safety concerns, alignment with provincial goals, and ability to address current or projected enrolment pressures. Scoring provides a basis for prioritizing projects in alignment with anticipated site opportunities.

### 4. Preliminary endorsement

Approved proposals are assigned “ready status,” indicating there is a desire to move forward with the proposal. These projects will be revisited as potential sites become available.

### 5. Responsive site selection

Education and Infrastructure work directly with the charter school to identify suitable sites, prioritizing:

- Government-owned surplus sites; and
- Strategically valuable locations identified in partnership with municipal and provincial planning bodies.

Charter schools are permitted to propose private market sites, which will be rigorously assessed by Infrastructure and Education for:

- Compliance with zoning and educational facility standards;
- Cost effectiveness compared to government-owned options; and
- Long-term viability and suitability for educational purposes.

### 6. Final approval

Proposals are revised to include site details such as site feasibility and readiness, cost implications of the identified site compared to hypothetical or alternative site, and the urgency of acquiring the site to avoid losing a strategically valuable opportunity.

Selected projects are approved by Minister and approved individually by Treasury Board and Finance. Once approved, Education and Infrastructure will work with the charter on construction implementation.

## Preliminary endorsements

- Enable Education and Infrastructure to anticipate and plan for future charter school needs without committing resources prematurely to specific sites.
- Allow charter schools to move through key planning and pre-implementation phases, aligning with available resources and market conditions.
- Reduce delays caused by waiting for site-specific details while ensuring priority proposals progress in the approval process.
- Benefits for charter schools:
  - Schools can focus on refining their proposals and planning without the burden of securing a site upfront.
  - Preliminary Endorsement signals a strong likelihood of moving forward, encouraging schools to prepare for operationalization.
- Benefits for government:
  - Avoids premature financial commitments while maintaining the ability to respond quickly when opportunities arise.
  - Ensures only proposals aligned with provincial goals are in the pipeline, preventing resource allocation to low-priority projects.
  - Allows the government to act swiftly when a site becomes available, reducing lead time for school openings.

## Key aspects

### 1. Preliminary endorsement

Approval is granted based on the merit of the proposal and its alignment with strategic and operational criteria. The approval is conditional, subject to the availability and acquisition of a suitable site.

## 2. Validity period

Preliminary Endorsements are time-limited to one year. If a site is not secured within this timeframe, the approval expires, and charters may include the proposed project as part of their annual Capital Plan submission.

## 3. Budget placeholder

Financial provisions are earmarked for conditionally approved proposals but not committed until a site is secured. This ensures responsiveness without overextending budgetary resources.

## 4. Site appropriateness

Charters that have identified a potential private market site will submit an overview that includes:

- A description of the site's location, size, and condition;
- Evidence of the site's suitability for educational purposes, including zoning and compliance with municipal regulations;
- Assessment of potential risks; and
- Site readiness checklist.

The proposal should also demonstrate how acquiring the site aligns with the government's broader educational and financial objectives.

Education and Infrastructure will evaluate the proposed site against key criteria, such as suitability for use as a school site, accessibility for transportation, compliance with safety standards, potential for long-term use and adaptability for future growth, and cost effectiveness compared to other alternatives.