



Advancing Equity and Access Through Quality Authorizing

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Components of the Annual Report Toolkit



Annual Report Toolkit

Introduction

September 2024

The Annual Report Toolkit is a product of CA 2.0—Advancing Equity and Access through Quality Authorizing, an initiative led by the California Charter Authorizing Professionals (CCAP). WestEd's support in the initial development of the 2021 Toolkit is appreciated.



Academic Performance Framework

Core Question: Is the charter school's education program a success?

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Financial Health and Sustainability Framework

Core Question: Is the charter school financially viable?

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Operations and Governance Framework

Core Question: Is the charter school operating and governed effectively?

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Public Policy Purpose Framework

Core Question: Is the charter school serving public policy purposes?

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Three Annual Performance Report Options with Annotated Samples

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Toolkit: Purpose and Use



The Toolkit and Frameworks are intended as a foundational resource for authorizers



Authorizers should adjust to their own contexts and practice



Toolkit components incorporate legal requirements and best practices



Toolkit components include a focus on the original intent of charter schools

Annual Performance Report: Introduction



Aligned to the **criteria for renewal** and the renewal review process;



Provides an **indicator** of the likelihood of the school's ability to make a compelling case for renewal; and



Provides schools with **regular feedback** regarding their progress towards renewal affording them an occasion to take early corrective action, thereby increasing the opportunities for a charter school to succeed.

Overview

Core Performance Questions	Specific Toolkit Resource
Is the education program a success?	<i>Academic Framework & Site Visit Protocol</i>
Is the school financially viable?	<i>Financial Health Framework</i>
Is the school operating and governed effectively?	<i>Operations and Governance Framework, Site Visit Protocol, Governance Checklist, Website Review Checklist, LCAP Review Checklist, document collection repository (e.g., Epicenter, DTS Vault)</i>
Is the school advancing equity and access through serving public policy purposes?	<i>Complaints filed with the authorizer, Site Visit Protocol, and additional narrative and demographic data in the Annual Performance Report</i>



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Questions: info@calauthorizers.org

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