



THE TRI-STATE ALLIANCE TO  
IMPROVE DISTRICT-LED CHARTER  
AUTHORIZING



Presented by the Colorado Charter School Institute

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## **1. Absolute Priority 1: Strengthening Charter School Authorizing and Oversight**

The Colorado Charter School Institute (CSI) addresses Absolute Priority 1: Strengthening Charter School Authorizing and Oversight by creating the **Tri-State Alliance for Improving District-Led Charter Authorizing (Tri-State Alliance)**. This project is designed to strengthen authorizing by school districts and small and rural authorizers and by doing so improve outcomes and expand quality choices available for all families and students. The Tri-State Alliance will result in the creation and dissemination of replicable best-practice resources to support effective authorizing and charter school oversight by school districts, including small/rural authorizers. These resources will initially be used in Colorado, California, and Florida, with a plan to share them widely on a national scale over time, especially in states where districts are the predominant authorizers, states that have enacted charter laws in the past five years, and states with many small/rural authorizers. The three states partnering in this project represent 40% of the nation's authorizers who oversee 30% of all charter schools in the country.

Through intentional work by leaders and their teams within the Colorado Association of Charter School Authorizers (CACSA), the Florida Association of Charter School Authorizers (FACSA), and the California Charter Authorizing Professionals (CCAP), as well as purposeful collaboration among the three states, this project will improve the quality of the charter school sector by addressing the current gap in best practice resources and professional development for district and small/rural authorizers. This effort emphasizes peer-to-peer efforts to improve professional practice through state-based work that leverages nationally-recognized tools and procedures. Our objectives and performance measures are both ambitious and attainable. Our project design is carefully aligned to our logic model, is supported by strong theory and is predictive of achievement. Our management model is both localized and national, featuring

experienced state-level leaders and an accomplished Project Director who will oversee the work across the three states with a keen eye on the overall vision. The authorizing practices that we will implement and promote in our states are based on the recommended best practices outlined in the Principles and Standards for Quality Charter School Authorizing developed by the National Association for Charter School Authorizers (NACSA). In addition, the work is based on the state-specific versions of standards of professional authorizer practice. A “Brain Trust” of advisers, comprised of seasoned professionals from district authorizers recognized for the quality of their practices, national authorizers, and other thought leaders in the charter school authorizing arena will provide guidance in the development and dissemination of project deliverables. These deliverables will specifically cater to district and small/rural authorizers and will address the absolute priority of strengthening charter school authorizing and oversight in all of the following areas: 1) conducting application reviews, 2) establishing governance standards and practices, 3) promoting and monitoring the compliance of charter schools with Federal, State, or local academic, financial, and operational requirements, 4) evaluating school performance, 5) facilitating the replication and expansion of high-quality charter schools, 6) improving schools’ academic, financial, or operational performance, and 7) closing persistently underperforming schools. As we do this work, we will give full recognition to protecting the autonomy charter schools are provided by law to innovate and better serve their students. Because our alliance brings together the knowledge, experience, and capacities of CACSA, FACSA, and CCAP, this project will contribute more best-practice resources than one state could working on its own. Our tri-state collaboration also facilitates relationship-building and easy transferability of best practices and lessons learned, resulting in an efficient and effective route to stronger district authorizing in our three states and beyond.

## **2. Competitive Preference Priority: Building Capacity in the Authorizing Process for Educational Agencies with the Most Need**

The Tri-State Alliance addresses the Competitive Preference Priority of Building Capacity in the Authorizing Process for Educational Agencies with the Most Need. This project will engage and provide support to a large proportion of district authorizers in Colorado, Florida, and California, including small and rural districts and districts that authorize a significant number of charter schools experiencing significant low performance or non-compliance with academic, financial, governance, or operational requirements, which we are labeling “high-need” districts for the purposes of this proposal. Through targeted outreach, training, and dissemination of resources created to specifically meet their needs, this project will result in a measurable increase in these districts’ use of best practices, thereby building their capacity to effectively serve the charter schools they oversee.

## **3. Competitive Preference Priority: Empowering Families and Individuals to Choose a High-Quality Education that Meets Their Unique Needs.**

The Tri-State Alliance also addresses the Competitive Preference Priority of Empowering Families and Individuals to Choose a High-Quality Education that Meets Their Unique Needs. This project will promote strong authorizing as an effective way to improve options for all students, thereby expanding access and services for disadvantaged students, students with disabilities, and English Learners. By the end of the grant period, districts in our three states will have a measurable increase in the use of best practices that specifically support the needs of these students, as well as progress towards parity in enrollment of these students in charters compared to traditional public schools.

## **4. Significance of the Proposed Project**

### **4.1 Impact of Authorizing on Charter School Quality and Predominance/Significance of District Authorizing Nationally**

This project focuses on the bulk of the country's authorizers. Nationally, 90% of authorizers are districts, and 53% of charter schools are overseen by districts. 91% of districts oversee five or fewer schools. A few districts oversee 100 or more, and about half of the large authorizers of all types are districts (State of Charter Authorizing, NACSA 2015).

The Tri-State Alliance proposal is designed to assist all district authorizers. We recognize that individual districts have a range of views regarding charters. Some district authorizers have been recognized nationally for excellence in authorizing and oversight. We also recognize that there are districts that do not desire to expand the number of charter schools they oversee. Our commitment is to support the improvement of the practices of all authorizers, regardless of their history, positions or orientation towards charter schools. We will accomplish this by outreach to and engagement of all authorizers, especially small and rural authorizers, with a focus on creating relationships and providing Professional Learning opportunities and high-quality tools and best practices.

To improve educational outcomes for students attending charter schools, all charter schools must be high quality. To improve charter school quality, the quality of authorizing must improve. Thus, the core premise of this project is that in order to improve charter school authorizing, the project deliverables must meet the myriad of unmet needs of the predominant authorizers in the sector, namely, school districts.

### **4.2. Context of Charter Authorizing in California, Colorado, and Florida**

#### **4.2.1. California**

In California, where the Charter Schools Act was enacted in 1992, every school district, county board of education, and the State Board of Education is a potential authorizer. Currently, California has 327 authorizers (326 districts/counties and the State Board of Education), which oversee 1,253 charter schools, serving a total of 604,700 students (National Alliance of Public Charter Schools 2018). California's districts vary in size from single-school districts serving fewer than 100 students in rural communities; to the Los Angeles Unified School District, with 277 charter schools and over 154,000 students. There are over 1,000 individual school districts in California, each of which is a potential authorizer. Local school districts are the most common charter authorizing agencies in the state. These authorizers typically authorize a small number of charter schools. Of California's 327 authorizers, 92% have portfolios of fewer than 6 charter schools and 42% have only 1 or 2 schools. At the other end of the spectrum, 8% of authorizers account for 58% of the charter schools in the state.

#### **4.2.2. Colorado**

Colorado's charter authorization statute was adopted in 1993. All of Colorado's 178 districts are potential authorizers. In addition, in 2004 the legislature established the Charter School Institute (CSI), a statewide public charter school authorizer. Charter schools can be authorized either by a district or CSI. Currently, there are 46 authorizers – CSI and 45 school districts. The Colorado State Board of Education can grant exclusive chartering authority (ECA) to a school district to authorize all charter schools within its geographic boundaries. Charter applicants can apply to CSI only if they would be located in a school district that does not retain ECA, or if a school district that retains ECA waives that exclusive authority and allows the applicant to apply to CSI. 169 of the 178 school districts retain exclusive chartering authority. Charter applicants and charter schools may also appeal decisions made by districts or CSI to the



State Board of Education. There are 238 charter schools in Colorado, serving 114,700 students (National Alliance of Public Charter Schools 2018). CSI authorizes 41 charter schools; the remainder are authorized by districts.

#### 4.2.3. Florida

In Florida, only local school districts may authorize charter schools. All 67 Florida school districts are potential authorizers. Currently, there are 654 charter schools in 46 school districts serving 283,755 students in Florida (Florida Department of Education 2016 Authorizer Report). If applicants are initially denied by their district, they may appeal to the State Board of Education; the Appeals Commission is their preliminary step. All non-renewals and terminations go to an Administrative Law Judge. The size of authorizers’ portfolios run the gamut from one charter school in many small and rural districts to 130 charter schools in Miami-Dade County. Other larger authorizers in the state include Broward, Orange, Palm Beach, Hillsborough, and Duval counties.

#### 4.2.4. Charter School Demographics in California, Colorado, and Florida

The following table illustrates charter school student demographics in our three states.

	<b>California</b>	<b>Colorado</b>	<b>Florida</b>
<b># of charter school students</b>	604,700	114,700	295,732
<b>% White</b>	28%	52.9%	31.6%
<b>% Hispanic/Latinx</b>	51%	33.5%	42.3%
<b>% Black/African American</b>	8%	5.8%	20.0%
<b>% Asian</b>	5%	3.9%	2.6%
<b>% Other</b>	8%	5.1%	3.4%
<b>% Free or reduced lunch</b>	59%	37%	54.9%
<b>% English Learners</b>	17%	21.8%	9.9%

<b>% Students with disabilities</b>	10%	7.1%	9.6%
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*Source: National Alliance for Public Charter Schools and California, Colorado and Florida*

*Departments of Education*

**4.3. Need for Change**

**4.3.1. The Challenges of District Authorizing**

The Tri-State Alliance recognizes that the dominant structure is authorization by school districts in the majority of states with charter schools. While the research base has identified advantages of other authorizing structures, the purpose of this project is to focus on this district-dominant structure. The goal of the project is ultimately to improve the authorization capacity of school district authorizers; to establish commonalities of best practice implementation, especially in small and rural authorizers; and to improve the quality of the charter schools they authorize. Our approach will build on the expertise of experienced large and small authorizers, identify best practices, tailor these to meet the needs of small authorizers, and then disseminate and train these small/rural authorizers. This approach will effectively improve charter quality and student outcomes.

Across the U.S., districts have a mixed record of authorizing. A number of districts are nationally recognized and studied for their high quality and innovative practices. However, there are many “reluctant authorizers,” - i.e. school districts that become authorizers when they receive charter applications they did not solicit, including small and rural districts. Many of these districts are unprepared to meet their application review and oversight obligations. Finally, there are school districts that are reluctant to approve charter school applications and thus do not apply charter authorizing and oversight best practices. This project will offer a successful strategy to leverage the best national and local district authorizer practices to improve the practices of all of these types of school districts, especially small/rural authorizers.

Concerns about the engagement of district authorizers with quality authorizing practices are common. But while some districts are inadequately engaged, we must recognize that some of the nation's best authorizers are school districts. For example, Denver Public Schools (DPS) is the authorizer that initiated the approach to performance frameworks that has been embraced by the industry. DPS tools were early examples that influenced subsequent adoption by NACSA and other technical assistance providers. Districts are capable of being among the best authorizers. In the words of NACSA's 2015 "State of Charter Authorizing" report, "there can be great outcomes when district officials work together to manage a portfolio of both quality traditional schools and quality charter schools to meet community needs."

Districts have approved and are overseeing many of the largest charter portfolios in the nation. Of the ten largest charter communities, districts currently oversee or are regaining authority over charters in five of them. (A Growing Movement: America's Largest Charter School Communities, NAPCS 2016). Some of the nation's largest authorizers are involved in this project, including: Los Angeles Unified School District, which has 277 charter schools serving over 154,000 students (more than double the next largest charter school community of New York City, and more students than 40 states with charter laws); and Miami Dade County Public Schools, which has 130 charter schools serving 62,924 students.

While some districts have large charter portfolios, 73% of districts oversee only one or two schools (State of Charter Authorizing Report, NACSA 2015). Authorizers with small charter portfolios are unlikely to have the capacity to implement the recommended practices that require comprehensive staff expertise in multiple substantive areas. In these cases, they are unlikely to have a designated liaison, or if a person is assigned, it is often a fractional responsibility, with districts allocating as little as .1 FTE to the authorizing function. In these districts, there is often

neither institutional knowledge or policy, nor a staff member with the knowledge to handle important authorizing functions. In many districts, when a charter applicant applies for a charter, the district has literally never received an application before, or no one who is currently employed by the district was on board the last time an application was reviewed. Meanwhile, state laws include timelines that require the district to design and implement a charter review and decision process in a relatively short amount of time - 90 days, for example, in Colorado. Without a merit-based, technically sophisticated approach to charter review, too many districts fall back on ad-hoc procedures that do not reflect best practice and can become highly politicized. This can result in the approval of weak applicants or the denial of strong and legally compliant proposals.

District authorizers that are understaffed or new to this work may also be unable to adequately probe the capacity of a charter applicant's governing board or conduct due diligence regarding operators with multiple schools. Governance is a perennial challenge for many charter schools, which can be further complicated by schools with network affiliations. Many charter schools in the participating states are affiliated with for-profit and nonprofit networks or charter management organizations. This project will provide authorizers with tools and procedures to appropriately oversee governance issues, including exercising due diligence when schools propose to expand or replicate, as well as the specific governance challenges that can accompany single-site charter schools. Experienced and sophisticated authorizers implementing best practices have extensive networks of peers that help them learn about potential operators, rigorous review procedures that include due-diligence on networked or managing operators, as well as clear expectations for the responsible governance of independent and networked or managed schools. Tools, procedures, and recommended best practices developed by these types

of authorizing offices with multiple staff members who oversee scores of schools are simply not appropriate or viable for small authorizers. Therefore, strengthening authorizing nationally requires a successful strategy to improve the practices of ALL school districts, regardless of size, and resources must be developed to support both large districts with many charters and small districts with little or no authorizing experience. This project will build on the strong foundation that already exists by adjusting language and specifics in current resources to meet small authorizers' unique contexts. Finally, our focus on building peer-to-peer relationships also will strengthen the capacity of small authorizers.

#### **4.3.2. Improving District Authorizing Practice Requires Sensitivity to District Politics**

CACSA, FACSA, and CCAP are committed to helping authorizers in our states adopt best practices as outlined in each state's version of professional standards. These state-developed standards are heavily influenced by NACSA's Principles and Standards. By emphasizing peer-to-peer networking, we believe that we can better engage our peers from districts that have not yet developed or adopted a range of best practices. It is recognized that there are a myriad of practical and contextual issues faced by districts related to charter schools.

Our experience in our three states has demonstrated that multiple challenges can block the implementation of strong authorizing practices or undermine previously strong practices. These include: the absence of established policies and procedures, rapid turnover in school boards or authorizing staff, inadequate staff resources, infrequent charter applications, and politicized public debates. In this environment, efforts to expand the number of districts implementing best practices require a clear focus on quality, merit-based and technically robust methods, careful design, and attention to district concerns. Peers in other districts are likely to be the best partners to drive this change.

CACSA, FACSA, and CCAP have successfully recruited and engaged with districts that reflect various contextual challenges in decision making. By emphasizing high-quality technical work and educating district leaders about the power of strong authorizing procedures to support more informed decision-making, the ranks of our membership have grown. We also partner with Charter Support Organizations (CSOs) in our states, which regularly help charter applicants in their earliest stages. Through these partnerships, we are aware of viable charter founding groups that are likely to apply to a district with no authorizing experience before the district itself knows about them. By reaching out in advance of the applicant's submission and offering to partner with a district as it faces the time pressures under charter law, we find districts more likely to engage with us. More importantly, they are then more likely to adopt practices that are shared with them by peers in similar situations.

Staff and leadership who are committed to strong charter school authorizing and national best practices are in a sensitive situation. Many district staff working on authorizing feel they are most effective at supporting best practices when the work can be defined as neither pro-charter nor anti-charter, and instead is considered the technically appropriate approach to the tasks that districts are obliged to perform as authorizers. In this environment, technical assistance that comes from groups that are considered pro-charter decreases the willingness of unengaged districts to change their behavior.

Collectively, these approaches to strong authorizing are based on national best practices that CACSA, FACSA, and CCAP endorse. But in each state, district authorizers and other stakeholders have adapted principles and standards to reflect district contexts. The mission of many districts is to serve all their students, charter and non-charter, and to focus on broad challenges unrelated to school type. Within a context that is sensitive to district realities, our

project's approach is much more likely to change district practices than current efforts can do alone.

#### **4.4. Authorizer Associations in States with District-Led Systems**

##### **4.4.1. Story of CCAP in California**

California Charter Authorizing Professionals (CCAP) was founded by a group of committed and experienced charter school authorizing staff members from district and county offices from around the state who first came together in late 2013. CCAP was incorporated in late 2014 and received 501(c)(3) status in 2015. The mission of CCAP is to *“advance quality public education for all students by providing charter school authorizing professionals with the support, resources, and collective voice necessary to foster high-performing, fiscally sound, autonomous, and accountable charter schools.”* The CCAP board's eight members come from agencies with moderate to large portfolios, have varying backgrounds, and bring a rare level of depth and breadth of collective, unique experiences in charter authorization and oversight, charter school operations, general education experience and educational policy. In addition to the board, CCAP is supported by a statewide network of professionals who regularly contribute their ideas and energy. Currently, CCAP has 32 district and county office authorizer members who collectively oversee 425 schools, more than 33% of the state's charter schools. Associate members include prominent education-law firms and consultants in the field.

A majority of the members of the Charter Authorizers Regional Support Network (CARNet) grant's advisory board are members of CCAP. CARNet was funded by a three-year National Activities Grant through the Alameda County Office of Education beginning in March of 2015. The grant ended on June 30, 2018. CCAP members have served as the trainers and presenters at all their activities. CCAP partnered with CARNet to put on three successful

statewide conferences for charter authorizers and to create a guidance document for California authorizing called “Values, Principles & Expectations.” Other accomplishments through this federal grant include:

- Hosting seven in-person Boot Camps (which provided basic training for authorizing professionals across the state) as well as two Master Classes (geared towards more experienced charter authorizers).
- Customizing charter monitoring software to be an effective technology tool for authorizers, which has been fully implemented by eight authorizers, five more are in process, and an additional 40 have been trained.
- Creating a website rich with charter-authorizing tools, including all materials from in-person bootcamps as well as a series of “Charter Authorizer Basics” toolkits and webinar recordings covering the implications of ESSA for charter authorizers. These tools were adapted from high-quality tools used by individual authorizers, as well as tools used in other states.

CCAP was designated in the grant application as the successor organization to continue the authorizing support work, building on the activities funded by the federal grant. CCAP has been diligently working to continue to develop a strong charter authorizer membership-based organization for the long term. CCAP has developed its own website and its policy committee has produced a concept paper for the state legislature with ideas for improving authorizing through regulatory and statutory change.

#### **4.4.2. Story of CACSA in Colorado**

The Colorado Association of Charter School Authorizers (CACSA) was created in early 2016 to empower new and growing authorizers and to continue to develop mature authorizers.



Currently, CACSA members represent 12 district authorizers and CSI. Authorizers engaged in CACSA oversee about 70% of Colorado’s charter schools. CACSA seeks to expand collaboration among authorizers, to encourage mature authorizers to move beyond design and implementation into advanced practice, and to provide all authorizers with access to statewide resources, professional development, and support. CACSA regularly works with partners like the Colorado League of Charter Schools (CLCS) on model materials, as well as the Colorado Department of Education’s Schools of Choice Unit, with which it co-convenes regular meetings. CACSA’s accomplishments include creating:

- Model charter school application (and currently finalizing a model rubric);
- Template to streamline applications for waivers for state rules and regulations;
- An authorizer accountability database that promotes the use of data-driven authorizing decisions based on school performance;
- Strategies to list available facilities that charter schools may access; and
- Trainings on how to improve charter/district relations.

#### **4.4.3. Story of FACSA in Florida**

The Florida Association of Charter Authorizers (FACSA) was created in 2003 and incorporated in 2007. Its mission is to collaboratively equip districts with professional standards and best practices to authorize and support excellence in chartering for all students. To date, it has 73 members representing 31 district authorizers. 69% of active Florida authorizers are members. FACSA regularly partners with the Florida Department of Education, the Florida Consortium of Charter Schools, and the Florida Alliance for Charter Schools as well as national organizations such as NACSA and Charter Board Partners. FACSA members have been instrumental in developing:

- Best practices for authorizing;
- Principles and standards for quality authorizing;
- Improved state model documents, including the charter school/authorizer contract, the charter school application, and the application review template;
- Formal documents for contract renewals;
- Opening school checklist and procedures;
- Closure checklists and procedures; and
- A website with member-only resources for authorizers who are FACSA members.

## **5. Quality of the Project Design**

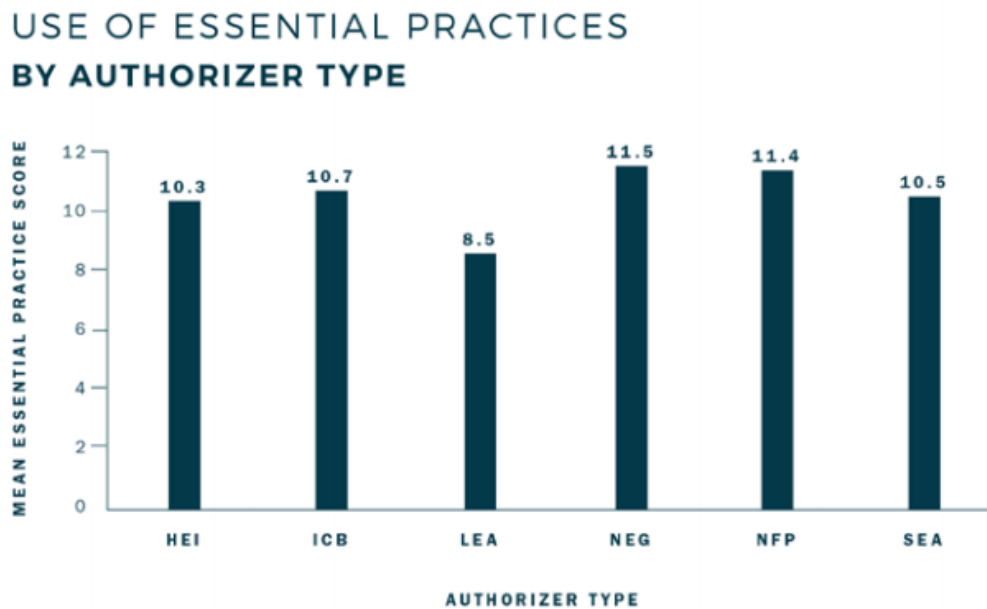
### **5.1. Research and Theory Supporting Project Design**

In their 2017 report “Bridging the District-Charter Divide to Help More Students Succeed,” the Center for Reinventing Public Education writes that “cooperative action between districts and charter schools is a necessity, not a nicety....But when we look across the formalized efforts to date, a concerning disconnect emerges between the stark need for cross-sector cooperation and what has actually been accomplished. Lack of commitment, strategy, resources, and legal frameworks to support cooperation all contribute to the limited success. Worse, they contribute to the many cities that are backsliding on progress. It is past time for leaders to accelerate this work.” This project will support district-charter cooperative action by giving districts best-practice resources to improve their authorizing and oversight of charter schools.

The first major finding of NACSA’s 2015 State of Authorizing Report was that “more local school districts may be embracing charter schools as part of district transformation efforts: data reveals significant growth in the number of authorizers, largely driven by new school-

district authorizers. In fact, the net growth in the number of authorizers during the last five years—nearly 100 authorizers—is due almost exclusively to an increase in school district authorizers (a net increase of 93 school district authorizers during this time frame). Contrary to popular perception, local school districts are by far the largest group of authorizers. Local districts now make up 90 percent of the 1,050 authorizers in the nation. District authorizers are not only the largest group of authorizers numerically, they also constitute nearly 50 percent of the nation’s largest authorizers.”

The report continues, “NACSA notes both negative and positive outcomes in this data. Many districts have not developed the capacity to effectively oversee charter schools in addition to their other duties. School district authorizers—by far—use fewer nationally recognized authorizing best practices (what NACSA calls “Essential Practices”) compared to any other type of charter school authorizer.” The chart below, from NACSA’s report, illustrates this.



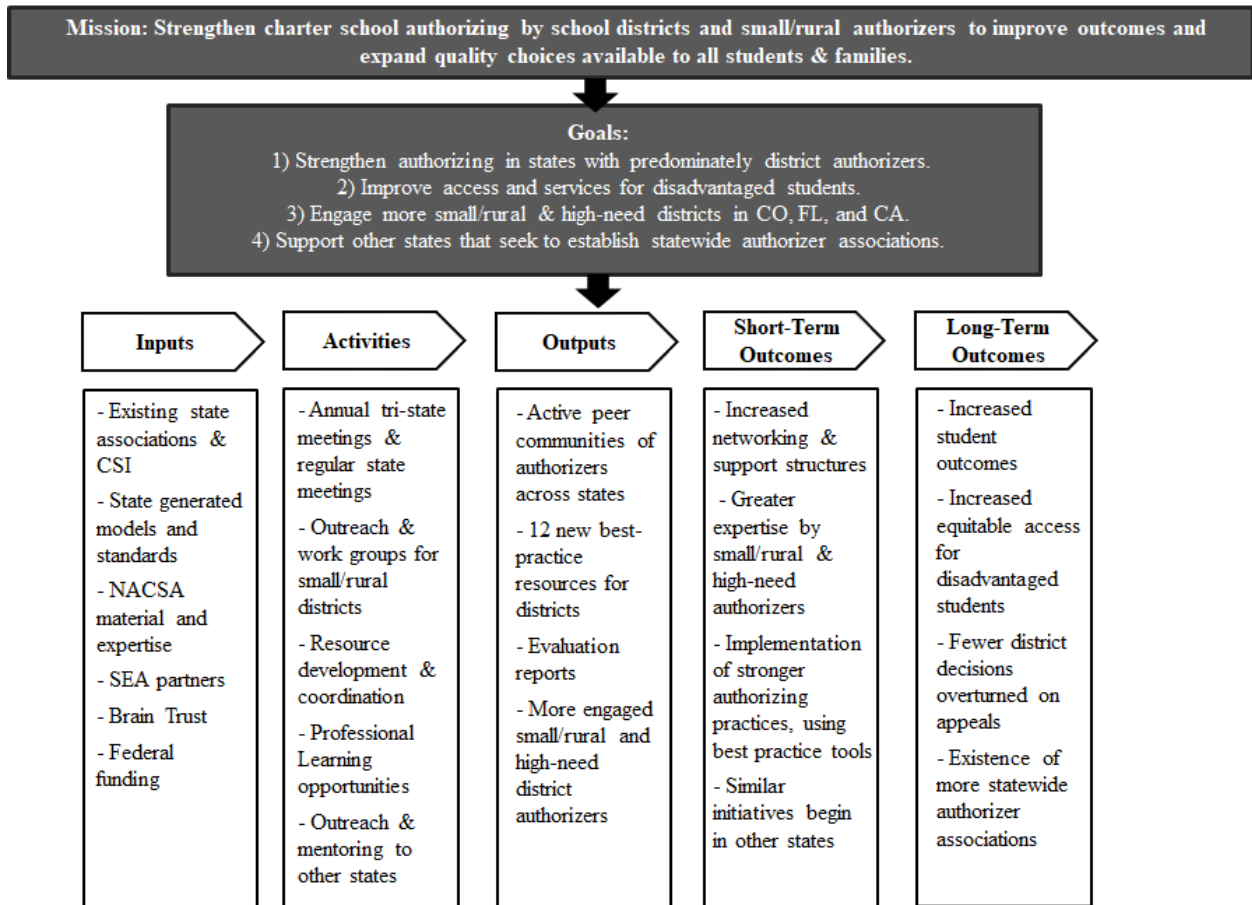
As shown, districts (LEAs) across the U.S. use only an average of 8.5 out of 12 of NACSA’s Essential Practices. In our three states, Colorado district authorizers have an overall rating of 9.6,

Florida district authorizers have an overall rating of 9.2, and California district authorizers have an overall rating of 8.0 - all well below the average use of essential practices by other types of authorizers. (Index of Essential Practices, NACSA 2016). Members of the three state associations are more likely to implement these practices currently, and the Tri-State Alliance will help to improve these numbers in their states through this project.

## **5.2. Overall Structure of the Project**

This project has the advantage of not starting from scratch. CACSA, FACSA, and CCAP's membership already include district staff committed to strengthening authorizing in their respective states and nationally. This project is a natural continuation of what each state group has already accomplished. The vast majority of work by these groups (with the exception of the work completed through the federal grant in California) has been done on a volunteer basis, demonstrating the capacity and commitment of the members leading these state-based associations. This grant award will expand our resource development, increase our outreach to district authorizers, and ultimately improve the long-term impact of our work.

## Tri-State Alliance Logic Model



### 5.2.1. Core Project Team of State Leads and Fiscal Agent

As the fiscal agent, CSI will oversee the project. Executive Director Terry Croy Lewis, who has 20 years of experience in the charter school sector, sees strengthening district authorizing as an important and necessary step to increase the number of high-quality charter schools available to our nation’s students. In addition, CSI’s Governing Board fully supports this project. CSI is governed by a nine-member Board of Directors; seven members are appointed by the Governor and two by the Commissioner of Education. The CSI board is statutorily required to be mission-driven and politically balanced, which ensures steady leadership and stable oversight.

When CSI was created in 2004, the legislature’s intent was to “**provide an alternative model of authorizing charter schools as a means to assist school districts in utilizing best practices for chartering schools** and to approve and oversee charter schools in school districts not desiring to do so themselves.” Helping districts to adopt best practices is a core part of the CSI mission. For example, CSI created partnership authorization initiatives, in which they partner with districts to support high-quality authorizing practices. This makes CSI an ideal fiscal agent and overall leader for this project.

To ensure that the project is given the attention it needs and deserves, CSI will hire a part-time Project Director to oversee the overall scope of the work. This person will closely monitor progress within each state and facilitate inter-state collaboration by coordinating regular meetings among the three states. He/she will lead with a keen eye on our overall vision and goals and will make sure that the project produces measurable outcomes each year.

In addition, CACSA, FACSA, and CCAP will each hire or contract with a State Director to lead the work in their respective states. The State Directors will be seasoned charter school authorizer leaders with proven track records of success - expert leaders who have been invested in this work for years and who are committed and ready to take it to the next level. Together, the Project Director and the three State Directors will comprise the core project team. Each state will determine its own staffing. In most cases, the State Directors also will be supported by a part-time project assistant. The project assistants will be adept at administrative and organizational tasks and will make sure no detail falls through the cracks. When state associations partner with local non-profits or government agencies, the personnel resources may be used exclusively for the State Director.

### **5.2.2. “Brain Trust” of Advisers**

The core project team will not work in isolation. Although the shared wealth of knowledge they will bring to the table will be significant, they will also benefit from the expertise of a “Brain Trust” of advisers from many corners of the charter school sector. The Brain Trust will include experts like Lauren Morando-Rhim and Paul O’Neill of the National Center for Special Education in Charter Schools and Renita Thukral of Civil Rights Solutions, as well as exemplary district authorizers and other top thought-leaders and experts in the charter school sector. The advice and support of the Brain Trust will provide us with a broad range of expertise to ensure that the resources we create for districts are truly rooted in proven best practices. Letters of support from initial members of the Brain Trust are included in the appendix.

### **5.2.3. Partnerships with State Education Agencies or State Entities**

Currently, more than 20 State Educational Agencies (SEA) and State Entities (SE) are implementing CSP grants and are required to dedicate resources to strengthening authorizing, including our three states of Colorado, Florida, and California. As such, each state association will work to actively partner with its corresponding SEA to support a state-wide initiative to strengthen authorizing. These partnerships will be mutually beneficial, but will allow all parties to maintain their autonomy and authority. CACSA, FACSA, and CCAP have all worked previously with their SEAs, including work to: create and disseminate model materials (applications, rubrics, performance frameworks); establish standards or expectations of authorizer practice; address concerns with low-performing schools; and ensure/expand access and services for students with disabilities, English Learners and other disadvantaged students.

Under this project, our intent is for joint meetings and conference calls to be convened regularly in each state under the auspices of both the SEA and the state authorizer association.

These efforts will expand our capacity to disseminate information more broadly within each state, reaching more districts and other authorizers that are not yet engaged in the state associations. Developing and strengthening these SEA partnerships will also facilitate work to improve oversight of charter schools and appropriate public administration by charter schools of state and federal funding and related programs. SEAs will be able to help disseminate the models, strategies, and other lessons to other SEAs nationally, including through the networks of SEA and SE administrators supported by ED using their own resources rather than funding from this project. For example, SEA partners can share lessons with other Project Directors at annual meetings or through online resources. This project will also convene webinars in which the SEAs and authorizer associations can work with their counterparts in states with new charter laws and states with many small and rural authorizers to share material and lessons learned, increasing the capacity of this project to disseminate to more states, more authorizers, and more types of authorizers. Project participants will also participate in conferences and forums convened in other states to share the lessons and materials of this project.

#### **5.2.4. NACSA knowledge and materials**

Our state associations are very familiar with NACSA's body of research. CACSA members Janet Dinnen and Ryan Marks from CSI and Angie McPhaul and Maya Lagana from Denver Public Schools are NACSA Leaders. FACSA Secretary Nicki Brisson has also been a NACSA leader, and CCAP board member Corey Loomis is currently completing the Leaders program. Jose Cole-Gutierrez, another CCAP board member, serves on NACSA's board. As such, NACSA's essential practices for charter school authorizing and their findings and literature will serve as a bedrock for our project. The following NACSA materials have been informing our work and will continue to do so: "Quality Practice Project," "Index of Essential Practices,"



“Principles and Standards for Quality Charter School Authorizing, 2015 Edition,” and “Authorizer Practices: What’s Working and What’s Not.”

### **5.2.5. State policy commitments to strengthen authorizing**

All three of our state Boards of Education have demonstrated a strong commitment to strengthen charter school authorizing. In Colorado, the SBE approved Standards for Charter Schools and Charter Authorizers (1 CCR 301-88) in 2012. The standards for authorizers in this policy serve as guiding principles for the SBE when developing charter contracts and considering appeals. Several of the rules are based on NACSA-recommended principles and standards. In Florida, the SBE is currently working with FACSFA to develop a statewide charter school performance framework, a statewide system of authorizer accountability, a Florida Leaders in Authorizing fellowship program, and targeted training and support for authorizers. They have also partnered with NACSA to create Florida Principles and Standards and to train districts on best practices for interview techniques so that districts can better assess an applicant’s capacity to open and operate a high-quality charter school. In California, the State Board of Education has commissioned a study of their authorizer practice with Stanford University. State Board and CDE staff also participated in the development of California’s Values, Principles and Expectation document.

### **5.2.6. Recommendations of the National Center for Special Education in Charter Schools, Civil Rights Solutions, and Charter Board Partners**

Our work to strengthen the expertise and capacity of charter school authorizers will help charter schools improve their services for disadvantaged students. As we create best-practice tools, we will draw from “Building Capacity to Provide Special Education Services and Supports: A Toolkit for Emerging Best Practices and Opportunities for Charter Support

Organizations,” created by the National Center for Special Education in Charter Schools. We also will rely on the expertise of NCSECS’ Executive Director, Dr. Lauren Morando-Rhim, who is part of our Brain Trust. In addition, we will draw from the expertise of attorney Renita Thukral, who is a partner with Civil Rights Solutions and another member of our Brain Trust. Civil Rights Solutions helps schools, districts, and other stakeholders to take a proactive approach to better serving English Learners and to learning about and training staff on civil rights issues, resulting in better outcomes for students. Finally, we are also partnering with Charter Board Partners (CBP). CBP has partnered with FACSA and CSI in previous efforts and will build on this record to help project participants develop and disseminate materials and trainings that will focus on clarifying expectations for independent governance of charter schools affiliated with networks or managers, as well as providing general assistance in improving charter school governance. Letters of support from our partners are included in the appendix.

### **5.3. Goals and Objectives**

Our project has four goals that collectively will make a substantial contribution to better district authorizing nationwide. Our **first goal** is to strengthen authorizing in states with predominately district authorizers. Our **second goal** is to educate districts and other key stakeholders about districts’ ongoing authorizing and oversight responsibilities under state law as an effective way to expand options for all students, thereby improving access and services for disadvantaged students, students with disabilities, and English Learners. Our **third goal** is to engage and provide support to a larger proportion of district authorizers in Colorado, Florida, and California, including small and rural districts and districts that authorize a significant number of charter schools experiencing significant low performance or non-compliance with academic,

financial, governance, or operational requirements. Our **fourth goal** is to support states outside the Tri-State Alliance that seek to establish statewide associations for charter authorizers.

We will accomplish these goals through multiple strategies, including identifying the barriers facing authorizers, with a focus on small and rural authorizers and authorizers whose portfolios of charter schools include a significant number of low-performing or non-compliant schools. We will create and distribute high-quality model materials and support state and national communities of practice through regular meetings, working groups, conference calls, webinars and other strategies that facilitate peer-to-peer networking and development to collaborate and create. The core project team, comprised of the Project Director, State Directors, and state teams, will meet in person once a year and virtually on a quarterly basis. Within each state, the State Directors will convene regular monthly meetings and/or calls, meeting in person at least quarterly. Working groups and subcommittees dedicated to specific tasks will also meet on a regular basis. In addition, communication and sharing of resources will happen on the web. Each state will create and/or improve their online web community that includes websites, threaded discussions, document archives, and more. A national version of this will exist as well. The work groups will develop and share targeted materials that address common challenges. Collectively, the members will help to define and articulate high expectations in authorizer practices for all their peers.

As we work towards our goals, the evaluation team will continually assess our progress and effectiveness using quantitative and qualitative methods: documentation of project activity, surveys and interviews of CACSA, FACSA, and CCAP members, surveys and interviews of school board members, superintendents, and SBE members, attendance at national meetings and some state-based events, observation of conference calls and webinars, follow-up data gathering

after meetings and events, use of NACSA data on essential practices, and use of state data on charter school openings, closings, and performance.

**5.3.1. Goal #1: Strengthen authorizing in states with predominately district authorizers.**

During year 1, each state organization will evaluate what prior work it has already completed or is in process related to the following areas outlined in Absolute Priority 1: conducting charter school application reviews; establishing governance standards and practices for charter schools; promoting and monitoring the compliance of charter schools and authorized public chartering agencies with Federal, State, or local, academic, financial, operational, or other applicable requirements; evaluating the performance of charter schools or authorized public chartering agencies; facilitating the replication and expansion of high-quality charter schools; improving the academic, financial, or operational performance of charter schools; and closing persistently underperforming charter schools.

Specifically, the core project team will evaluate which of the following tools already exist or are in the process of being created in the three states: RFP/call for proposals, including budget and governance templates; application package; rubric for reviewers; training material for reviewers; list of milestones for charter schools to open; model charter contract; renewal procedure (including tools for replication and expansion); renewal application and rubric to score it; model policies for revocation and closure; school board resolution endorsing state authorizing standards; performance framework/annual report from authorizer to charter schools; model performance agreement between EMO/CMO and charter schools; and a district handbook that clarifies charter school access to programs and services from the district, including students with disabilities, English Learners, and other disadvantaged students.

Together, we will catalogue and evaluate existing resources for oversight throughout the full life cycle of charter schools in our three states, and by the end of year 1 we will develop a plan for which tools each state organization will create by the end of the grant period. The plan will be based on logical next steps for the highest needs for each state and for the Tri-State Alliance as a whole. As a Tri-State collaborative we are able to benefit from the expertise in each state. We will also avoid unnecessary duplication of work so that the resources each state develops complement each other and are created in a manner to allow effective use in multiple states with minimal customization, resulting in a robust total set of tools and resources that will have value in many states.

We will freely share the materials, tools, and model policies that each state has already created so that the other states can use them as a strong foundational document and/or adopt them as is when laws and context allow. We will also coordinate across states and sequence our work, based on previous work, state need, and the overall tri-state context, to determine each state's annual and project work plan. Then, during years 2 and 3, we will work the plan. Each state will create at least two new resources during year 2 and at least two additional new resources during year 3. By the end of the grant period, the combined efforts of the three states will have resulted in a total of 12 or more new best-practice charter authorizing resources for district and small/rural authorizers.

Our purpose in creating these resources is that districts and small/rural authorizers will *use them* - sooner rather than later - to improve their charter authorizing practices. Therefore, we will be vocal and intentional about informing authorizers that these new resources exist. By the end of year 2, each state organization will have developed and sponsored Professional Learning opportunities so that districts and small/rural authorizers will learn about the new resources. By

the end of year 3, each state will have offered the training four or more times. To make the trainings as accessible as possible, we will offer both in-person and virtual ways to attend. A high emphasis will be placed on implementing the use of the tools. Because there is some overlap in our goals, the measurable objectives for the implementation of the best-practice tools are listed under Goals 2 and 3. Objectives 1.1 and 1.2 represent a considerable body of work that will add great value, making them ambitious; and they are within our control, making them attainable. Objective 1.3 represents an ambitious goal in scale, but recent progress in reaching new authorizers and the resources of this project make it attainable.

### Measurable Objectives for Goal 1

Objective 1.1a: By end of year 1, we will have completed a comprehensive analysis of the challenges faced by authorizers in each state and the existing and in-process charter school authorizing resources within our three states.

Objective 1.1b: By the end of year 1, we will have identified the highest needs and priorities in each state. Based on the analysis and the review of resources available in each state, we will identify the tools each state will need to create/adapt and implement by the end of the grant period to strengthen authorizing practices in their state.

Objective 1.1c: By the end of year 2, each state will have created 2 or more new highest-need resources.

Objective 1.1d: By the end of year 3, each state will have created a total of 4 or more new highest-need resources.

Objective 1.2a: By the end of year 2, each state will have developed Professional Learning opportunities to share resources with districts and small/rural authorizers.

Objective 1.2b: By the end of year 3, each state will have offered the Professional Learning

opportunities 4 or more times to the target audience of districts and small/rural authorizers.

Objective 1.3: By the end of the grant period, there will be a 5% increase in the number of districts in each of our states that either comply with 10 or more of NACSA’s 12 essential practices or, if a state-specific measuring tool is more appropriate, that comply by a similar proportion according to the state-specific metric.

**5.3.2. Goal #2: Educate districts and other key stakeholders about districts’ ongoing authorizing and oversight responsibilities under state law as an effective way to expand options for all students, thereby improving access and services for disadvantaged students, students with disabilities, and English Learners.**

Our second goal addresses Competitive Preference Priority: Empowering Families and Individuals to Choose a High-Quality Education That Meets Their Unique Needs. The numbers in each of the three states tell a different story about how well charter schools are serving disadvantaged students compared to traditional public schools.

	Colorado TPS	Colorado Charters	Florida TPS	Florida Charters	California TPS	California Charters
<b>% English Learners</b>	16.9%	21.8%	9.2%	9.9%	22%	17%
<b>% Students with disabilities</b>	11.7%	7.1%	12.6%	9.6%	11%	10%

*Sources: Colorado, Florida, and California Departments of Education*

In Colorado, charters serve 4.9% more English Learners than traditional public schools, but serve 4.6% fewer students with disabilities compared to TPS. In Florida, charters serve .7% more English Learners than TPS, but 3% fewer students with disabilities. In California, charters serve 1% fewer students with disabilities compared to TPS, but 5% fewer English Learners.

To better understand the factors that drive these numbers, during year 1 each state will conduct a needs assessment to identify whether barriers exist that prevent district and small/rural authorizers from ensuring that their charter school portfolio adequately serves educationally disadvantaged students. The exact focus of each state's needs assessments will vary. In Colorado and Florida, CACSA and FACSA members will seek to understand why their charter schools serve fewer students with disabilities than traditional public schools. Meanwhile, CCAP's focus will be on why California charters serve 5% fewer English Learners than traditional public schools.

Once each state has more data and an analysis of the factors affecting these numbers, they will develop a plan outlining steps the state associations can take directly, as well as strategies to work with other stakeholders to address their findings, and will share the information with appropriate stakeholders. By the end of year 1, each state will develop and implement an appropriate plan to support authorizers, while also respecting the autonomy of individual charter schools. At the end of years 2 and 3, the states will work together to conduct a cross-state summative report that identifies similarities and differences in findings generalized across the states. This report will provide useful information for authorizers nationwide. However, the true measure of success will be the implementation of best practices to serve disadvantaged students and an increase in enrollment of disadvantaged students by the end of the grant period. The specific focus area and goal percentages vary by state according to individual context. These goals are ambitious, particularly given the time frame and the indirect influence over enrollment decisions. Plans developed in Objective 2.1 will be strategic and designed to provide supports that help target districts work with us to achieve Objectives and 2.2 and 2.3. The proportional



increases in Objective 2.3 reflect changes in relatively small gaps, and recent trends by districts have been positive, making them ambitious but attainable.

<b>Measurable Objective for Goal 2</b>
<p><u>Objective 2.1a:</u> By end of year 1, each state will: 1) conduct a needs assessment (to identify whether barriers exist that prevent district and small/rural authorizers from ensuring that their charter school portfolio adequately serves educationally disadvantaged students), 2) develop a plan to address the findings from the needs assessment, and 3) share this information with appropriate stakeholders. (To be incorporated/done in conjunction with the analysis completed as part of Goal 1).</p> <p><u>Objective 2.1b:</u> By the end of year 1, each state will have put its plan into action. At the end of years 2 &amp; 3, the states will provide a cross-state summative report on their plans' effectiveness.</p>
<p><u>Objective 2.2:</u> By the end of the grant period, district and small/rural authorizers in Colorado, Florida, and California will report a 15% increase in the implementation of best-practice tools that specifically support the needs of students with disabilities, English Learners, and other disadvantaged students by, as evidenced by the project evaluation.</p>
<p><u>Objective 2.3:</u> By the end of the grant period, charter schools in Colorado and Florida will close the gap in enrollment of students with disabilities between charters and traditional public schools by 43% and 66%, respectively.</p>
<p><u>Objective 2.4:</u> By the end of the grant period, California charter schools will close the gap in enrollment of English Learners between charters and traditional public schools by 50%.</p>

**5.3.3. Goal #3: Engage and provide support to a larger proportion of district authorizers in Colorado, Florida, and California, including small and rural districts and districts that**

**authorize a significant number of charter schools experiencing significant low performance or non-compliance with academic, financial, governance, or operational requirements (“high-need districts”).**

Our third goal addresses Competitive Preference Priority: Building Capacity in the Authorizing Process for Educational Agencies with the Most Need. Each state organization will begin its work on this goal by conducting a needs assessment to identify which districts authorize a significant number of charter schools experiencing significant low performance or non-compliance with academic, financial, governance, or operational requirements. Since there are unique circumstances in each state, the three states will create their own indicators to define what “significant number of charter schools” and “significant low performance or non-compliance” mean. After defining these indicators and conducting the needs assessment, the state organizations will measure how engaged these “high-need” districts are with CACSA, FACSA, or CCAP. Finally, before the end of year 1, the state organizations will make a focused, high-touch effort to contact the non-engaged “high-need” districts, communicate how CACSA, FACSA, or CCAP can support them, and invite their involvement. Because we anticipate that many of the “high-need” districts fall into this category due to inadequate staffing and resources, state teams will be diligent and persistent when necessary in repeatedly making contact, communicating how they can help, and inviting districts to take advantage of what they have to offer. We will take this same approach with other non-engaged districts in our states, including small/rural districts. Over time, we expect these efforts to result in increased engagement with our state organizations and increased implementation of best practices.

We will also create and support a dedicated working group of small and rural district authorizer leaders in each state. Each state group currently has members that oversee one or two

charter schools and serve rural communities, as well as members who have not yet chartered schools. These leaders will help each state group encourage participation by the target districts. The groups will also be joined by experienced authorizers with larger portfolios, but they will be led and coordinated by the smaller authorizers themselves. This personal outreach will be based in part on existing professional relationships and is designed to build trust and mutual understanding of the unique challenges that authorizers with very small portfolios or those in rural communities face when trying to implement strong authorizing practices. No other organizations have effectively engaged small and rural authorizers, making these goals highly ambitious, but recent trends are positive, and small and rural district authorizers that have joined will help us engage their peers, making these goals attainable. Support from SEAs will also help engage districts that oversee poor-performing schools.

Measurable Objectives for Goal 3
<p><u>Objective 3.1:</u> By the end of year 1, each state will 1) conduct a needs assessment to identify which districts authorize a significant number of charter schools experiencing significant low performance or non-compliance with academic, financial, governance, or operational requirements, (To be incorporated/done in conjunction with the analysis completed as part of Goals 1 and 2), 2) measure how engaged these districts are with the state association, and 3) invite the unengaged districts to get involved with CACSA, FACSA or CCAP.</p>
<p><u>Objective 3.2:</u> By the end of years 2 and 3, there will be a 10% (year 2) and 15% (year 3) increase in district authorizers that are engaged with CACSA, FACSA, and CCAP, including small/rural and high-need districts. (Engagement is defined as attendance/participation in at least 2 meetings or events per year).</p>
<p><u>Objective 3.3:</u> By the end of the grant period, district authorizers in Colorado, Florida, and</p>

California, including high-need and small/rural districts, will report a 15% increase in the implementation of best-practice tools that strengthen charter school authorizing and oversight, as evidenced by the project evaluation.

**5.3.4. Goal #4: Support states outside the Tri-State Alliance that seek to establish statewide associations for charter authorizers.**

CACSA, FACSA, and CCAP have made a positive impact on charter school authorizing in our respective states. We often receive questions from authorizers in other states, asking how we work and how they might be able to set up something similar in their state. In fact, we currently have a running list of states that have expressed interest in creating their own state associations. We are delighted to support these efforts, and will play an active part in doing so by extending an open invitation to interested states to attend CACSA, FACSA, or CCAP meetings and/or our annual national core project team meeting. By the end of year 1, we will invite five authorizers from states outside the Tri-State Alliance to attend a meeting or join webinars and conference calls. We will continue to extend this open invitation on an ongoing basis, and will also provide free mentoring support to interested states. The focus of this support will be professional networking on a peer-to-peer basis, in which authorizers and supporters in other states develop relationships and connections to peers in CACSA, FACSA, and CCAP. As they are created, all resources and material will also be shared and available for other states to use on the state associations' websites, and we will regularly direct interested authorizers from other states towards these resources. We also will increase dissemination by encouraging project partners (SEAs, SEs, and members of the Brain Trust) to direct interested authorizers towards these resources.

These goals are attainable, because they reflect activities the groups are already engaged in, and the combined efforts of the groups will make the benefits to other states more tangible. They are ambitious because they reflect an increase in scale and will dramatically leverage the work of this project.

Measurable Objectives for Goal 4
<p><u>Objective 4.1:</u> By the end of year 1, each state will have identified and invited 5 authorizers from states outside the Tri-State Alliance to attend a CACSA, FACSA, or CCAP meeting or a core project team meeting.</p>
<p><u>Objective 4.2:</u> By the end of the grant period, members of CACSA, FACSA, or CCAP will have provided a combined total of 75 hours of mentoring support (including participation in meetings) for states outside the Tri-State Alliance that seek to establish their own statewide charter authorizer associations.</p>
<p><u>Objective 4.3:</u> As they are available, the best-practice resources created by the Tri-State Alliance will be accessible on each state association’s website, and by the end of the grant period, all 12+ best-practice resources will be available on each state association’s website.</p>

**5.4. Dissemination of Results**

The best-practice resources we create will have application across the nation. Dissemination will take place in six primary ways: 1) through our three-state collaboration, as each state will share the resources we create with each other as soon as they are available, 2) through partnerships with SEAs, who are naturally in a position to share the resources through their interactions with authorizers in their state as well as their networks of SEA and SE administrators nationwide, 3) through CACSA, FACSA, and CCAP’s websites, where all of the resources will be freely available to authorizers across the nation, 4) through the Professional

Learning opportunities each state will offer, which will be available to interested authorizers across the nation, 5) through our support of other states that seek to create their own state authorizer associations, and 6) by submitting proposals to present this project and its findings at state and national conferences. As a result of these dissemination strategies, this project will directly impact most authorizers in Colorado, Florida, and California, which together represent 40% of the nation's authorizers who oversee 30% of all charter schools in the country. This result will be measurable through the project evaluation. However, since the resources and Professional Learning opportunities will be freely available online, regularly shared by our partners, and often talked about in our networking, mentoring, and conference activities, the ultimate impact will travel well beyond our three states.

## **6. Quality of the Management Plan and Adequacy of Resources**

### **6.1. Fiscal Agent: Colorado Charter School Institute**

The Charter School Institute has a strong track record as a model authorizer in the state of Colorado. Part of our mission is to assist school districts in using best practices for charter schools, and we have lived up to this commitment. As the fiscal agent, CSI accepts responsibility for leadership, compliance, and fiscal management. We have a long and consistent track record for successfully accomplishing project objectives on time and within budget, as well as the capacity and board-supported desire to extend our reach on a national scale. Local charter school leaders have provided letters of support to testify to CSI's effectiveness, which are included in the appendix.

CSI's Executive Director, Dr. Terry Croy Lewis, and Chief of Staff, Janet Dinnen, will jointly oversee the Tri-State Alliance. Dr. Croy Lewis has led CSI for the past two years. She was previously the Vice President of School Quality and Support at the Colorado League of

Charter Schools. She also founded High Point Academy (HPA), a charter school that opened in 2006, and served as HPA's Executive Director/Principal for eight years. In total, she has 20 years of varied experience in the charter school sector, working with urban, suburban, and rural schools and serving in roles ranging from founder to school leader to governing board member to consultant.

Ms. Dinnen has worked in the charter sector for over a decade and has been with CSI since 2013, serving in different capacities that include a focus on assessments, data analysis, state reporting, compliance monitoring, and school development. She currently oversees state and federal reporting and data quality initiatives, communications, and the new and conversion school applications cycle.

## **6.2. Commitment from CACSA, FACSA and CCAP**

State leaders from CACSA, FACSA, and CCAP have been working together to develop this project since early 2018. All three state organizations, as well as their leaders, have a strong history of working to strengthen charter school authorizing and oversight. CACSA, FACSA, and CCAP individually and jointly accept responsibility for achieving project goals on time and within budget.

## **6.3. Partners**

Our primary partners for this project are the State Education Agencies in Colorado and Florida. Since these SEAs are currently overseeing CSP grants that require them to strengthen authorizing, this collaboration supports the goals on both sides. The appendix includes letters confirming this partnership from the Colorado and Florida Departments of Education. Additional partners are the National Center for Special Education in Charter Schools, Civil Rights Solutions, Charter Board Partners, and the School of Public Affairs at the University of Colorado

- Denver. Experts from these organizations and others are also part of the Brain Trust, while CU-Denver is conducting the evaluation. Letters of support are included in the appendix.

**6.4. Timeline and Milestones**

After the initial activities to launch the project, the following activities will be ongoing throughout the grant period: quarterly core project team calls, monthly state association meetings, monthly working group/subcommittee meetings, frequent invitations to unengaged authorizers to engage with state associations, frequent invitations to states outside the Tri-State Alliance to attend state association and core project team meetings, mentoring support for authorizers seeking to establish their own state associations, consultations with Brain Trust Advisors as needed, joint meetings and conference calls with SEAs, and regular evaluation activities. The table below details our planned activities throughout the grant period, not including the ongoing activities listed above. The exact dates are subject to change depending on when the grant award is received.

**Year 1 Timeline and Milestones**

Timeline	Activities	Goal	Responsible
Oct–Dec 2018	Hire Project Director (PD)	All	CSI
	Hire State Directors (SD) and state project assistants.	All	PD
	Notify partners (SEAs, Brain Trust).	All	PD
	Conduct first core project team quarterly call.	All	PD



	Plan first annual gathering of core project team.	All	PD
<b>Jan-Mar 2019</b>	Convene monthly state meetings.	All	SD
	Create working groups/subcommittees.	All	SD
	Create state-specific and national online web community	All	PD, SD
	Conduct first annual gathering of core project team.	All	PD
	Analyze challenges faced by authorizers and existing and in-process resources in each state.	1	State teams
	Begin needs assessment to identify barriers in serving disadvantaged students.	2	State teams
	Create indicators to define “significant # of charter schools” and “significant low performance or non-compliance”	3	State teams
	Begin needs assessment to identify high-need districts.	3	State teams
<b>Apr-Jun 2019</b>	Identify tools each state will create/adapt.	1	State teams

	Complete needs assessment to identify barriers in serving disadvantaged students.	2	State teams
	Complete needs assessment to identify high-need districts.	3	State teams
	Measure how engaged high-need districts are with state associations.	3	State teams
	Convene working group of small/rural districts in each state.	3	SD
	Identify & invite authorizers from states outside the Alliance to attend state association or core project team meetings.	4	PD, SD
<b>July-Sep 2019</b>	Develop plan re: serving disadvantaged students to address findings from needs assessment.	2	State teams
	Share plan re: serving disadvantaged students with appropriate stakeholders.	2	State teams
	Invite unengaged districts to get involved with state associations.	3	State teams

## Year 2 Timeline and Milestones

Timeline	Activities	Goal	Responsible
<b>Oct–Dec 2019</b>	Begin creating 2 state-specific best practice resources.	1	State teams
<b>Jan–Mar 2020</b>	Continue creating 2 state-specific best practice resources.	1	State teams
	Begin developing Professional Learning Opportunities.	1	State teams
	Conduct second annual gathering of core project team.	All	PD
<b>April–June 2020</b>	Complete 2 state-specific best practice resources	1	State teams
	Finish developing Professional Learning opportunities.	1	State teams
<b>July–Sep 2020</b>	Share 2 completed state-specific best practice resources with other states in the Alliance.	1	SD
	Set date for 1 <sup>st</sup> offering of Professional Learning opportunities; advertise and invite enrollment.	1	SD

	Conduct cross-state summative report to determine efficacy of plan to serve disadvantaged students	2	PD
	Upload 2 completed state-specific best practice resources to state association websites.	4	SD

**Year 3 Timeline and Milestones**

<b>Timeline</b>	<b>Activities</b>	<b>Goal</b>	<b>Responsible</b>
<b>Oct–Dec 2020</b>	Begin creating 2 additional state-specific best practice resources.	1	State teams
	Conduct first Professional Learning opportunity.	1	State teams
	Determine dates for 3 additional Professional Learning opportunities; advertise and invite enrollment.	1	State teams
<b>Jan–Mar 2021</b>	Continue creating 2 additional state-specific best practice resources.	1	State teams
	Conduct 2nd Professional Learning opportunity.	1	State teams

	Conduct third annual gathering of core project team.	All	PD
<b>April-June 2021</b>	Complete 2 additional state-specific best practice resources	1	State teams
	Conduct 3 <sup>rd</sup> Professional Learning opportunity.	1	State teams
<b>July-Sep 2021</b>	Share 2 additional completed state-specific best practice resources with other states in the Alliance.	1	SD
	Conduct 4 <sup>th</sup> Professional Learning opportunity.	1	State teams
	Conduct cross-state summative report to determine efficacy of plan to serve disadvantaged students.	2	PD
	Upload 2 additional completed state-specific best practice resources to state association websites.	4	SD
	Link to all 12 completed best-practice resources (from the 3 states combined) to all 3 state association websites.	4	PD

## **7. Quality of Project Personnel**

### **7.1. Project Director**

CSI is already identifying highly-qualified individuals that can serve in the role of Project Director. The combined network of CSI, CACSA, FACSA, and CCAP is extensive and includes many seasoned professionals in the charter school sector nationwide. The first task upon receiving notification of funding will be to hire a highly-qualified person from the pool of identified applicants. The right candidate will have a strong track record of success. He/she will have a deep knowledge of the charter school sector and will be fully committed to helping districts and small/rural authorizers strengthen authorizing and oversight as a way to improve outcomes and expand quality choices available to all families and students.

### **7.2. Key Personnel from CACSA, FACSA and CCAP**

All three of our state organizations include highly-qualified leaders in the charter school sector with strong track records of achievement. Key personnel for this project include:

#### **Colorado**

**Dr. Terry Croy Lewis and Janet Dinnen** from CSI have been members of CACSA since its creation. Their expertise and experience is detailed above.

**Alex Medler** is Senior Director of the National Charter School Resource Center (NCSRC) with Safal Partners. Medler is a national expert on charter school policy who has worked in education reform since the earliest days of the charter movement. Through Safal Partners, Medler staffs CACSA and also advises foundations, state education agencies, charter authorizers and other clients in the U.S. and overseas. Prior to joining Safal Partners, he directed policy and advocacy for NACSA, and served on the board of NACSA while he chaired the board of CSI, directed research and policy development for the Colorado Children's Campaign, led national activities

for the U.S. Department of Education's Charter Schools Program, and directed charter school and school choice work for the Education Commission of the States.

**Tom McMillen** was a founding board member of Jefferson Academy, one of the oldest and most successful charter schools in Colorado. He continues to work with the Colorado Department of Education and the Colorado League of Charter Schools as a consultant and charter school board trainer. McMillen is currently transitioning to a new position as Community Superintendent for Charter Schools at Jefferson County Public Schools.

**Tim Matlick** is an Achievement Director at Jefferson County Public Schools, a former school principal, and the co-chair of CACSA. He has led efforts to develop resources, including tools to streamline charter school access to waivers.

**Tom Weston** is an experienced school administrator who currently serves as the authorizing director for multiple districts, including Pueblo 60, Academy 20, and the Boulder Valley School District. He is active in the CACSA leadership team and led CACSA efforts to create a model charter application and related rubric.

### **Florida**

**Jenna Hodgens** is the President of FACSA and the General Director of Charter Schools for Hillsborough County Public Schools. She has been an active member of the FACSA since its founding, and has served on the FACSA Board of Directors as a Board Member, Vice President and now President. She also served on the Charter School Review Panel and currently serves on the Florida Charter Schools Appeals Commission.

**Dr. Kia Sweeney-Scott** is the Vice-President of FACSA and the Director of School Choice Services at Orange County Public Schools. She also oversees the Opportunity Scholarship

identification process as well as Home Education and is a grant evaluator for the Florida Department of Education's office of Independent Education and Parental Choice.

**Nicki Brisson** is FACSA's secretary and District Director for Charter School Compliance and Support at Miami-Dade County Public Schools. She spearheads the authorizing cycle for MDCPS and a portfolio of 130 charter schools serving approximately 68,000 students. Brisson is currently completing her doctoral dissertation in Educational Leadership.

**Amy Fordyce** is FACSA's treasurer and a District Resource Teacher in the Charter Schools Office for Hillsborough County Public Schools. Her responsibilities include the application review and approval process, compliance monitoring, renewal of charter schools, and administrator support.

### **California**

**David Patterson** is a founding board member and treasurer of CCAP and was the Director of CARNet. Dr. Patterson has over 30 years of experience and leadership in improving public schools, including authorizing and oversight of charter schools and creating and managing high-performing schools. His extensive experience in the legislative, regulatory, and administrative arenas have given him a deep expertise in California education and charter school law and policy.

**Violet Gutierrez** is an active founding member of CCAP and the Director of Human Resources for the San Bernardino County Superintendent of Schools. She also serves as chair for the Equal Opportunity Commission for the County of San Bernardino. She previously was the Charter School Coordinator for the Riverside County Office of Education and has completed her Charter School Business Officer Training.



**Dina Wilson** is the Director of the Division of Accountability, Support and Monitoring at the Los Angeles County Office of Education. Wilson has served in LACOE's Charter School Office since 2013, first as Coordinator and then as Director, leading the work of reviewing charter petitions and overseeing charter schools authorized by the County Board of Education.

**Guadalupe Solis**, Ed.D., is Charter Administrator for Tulare County Office of Education. He has worked with the educational communities in the counties of Kings, Tulare, Fresno and throughout the state.

**José Cole-Gutiérrez** is Director of the Charter Schools Division for Los Angeles Unified School District, which currently oversees about 280 charter schools serving approximately 140,000 students. He is a member of the CCAP Board and the NACSA Board.

**Dr. Corey Loomis** is the Director of the Charter Schools Unit for Riverside County Office of Education. He has 23 years of education experience, currently serves on the Board of Directors for CCAP and is completing the Leaders Program through NACSA.

**Brianna Garcia** is the Director of Management Consulting Services for School Services of California. She has worked with school districts to strengthen their organizations by conducting organizational reviews, comparative analyses of school district resources and staffing, facilities reviews, and charter petition reviews. She has extensive experience related to planning and development of public school facilities, including charter schools and Proposition 39.

#### **CACSA, FACSA, and CCAP Board Members**

All three of our state organizations have active and committed boards. Board members' names are listed below. District/organizational affiliation is included for informational purposes only.

CACSA	FACSA	CCAP
Terry Croy Lewis, CSI	Jenna Hodgens, Hillsborough County Public Schools	Violet Gutierrez, Office of the San Bernardino Superintendent of Schools
Tim Matlick, Jefferson County School District	Kia Sweeny, Orange County Public Schools	Dina Wilson, Los Angeles County Office of Education
Alex Medler, Safal Partners	Nicki Brisson, Miami-Dade County Public Schools	Guadalupe Solis, Tulare County Office of Education
Tom Weston, Academy School District 20 & Pueblo School District 60	Amy Fordyce, Hillsborough County Public Schools.	David Patterson, Placer County Board of Education
Andy Franco, Falcon District 49	Christopher Taylor, School District of Indian River County	Jose Cole-Gutierrez, Los Angeles Unified School District
	Rhonda Stephanik, Broward County Public Schools	John Bohannon, Chico Unified School District
	Sonia Esposito, School District of Osceola County	Corey Loomis, Riverside County Office of Education
	Anita Smith-Henry, Duval County Public Schools	Brianna Garcia, School Services of California

### **7.3. Evaluator**

Our evaluator, Parker Baxter, is Director of the Center for Education Policy Analysis (CEPA) at the University of Colorado Denver School of Public Affairs. Previously, Baxter was Director of Knowledge at NACSA where he was responsible for identifying and disseminating effective practices for charter school authorization and oversight and assisting authorizers in developing their expertise. Baxter is also a Senior Research Affiliate at the Center on Reinventing Public Education where he previously served as Senior Legal Analyst working on the District-Charter Collaboration Compact Project and the Portfolio District Project. Prior to his work at NACSA, Baxter served as Assistant Superintendent and the Executive Director of the Office of Parental Options at the Louisiana Department of Education and as Director of Charter Schools for Denver Public Schools. Baxter was also an aide to Senator Edward M. Kennedy on the Health, Education, Labor and Pensions Committee, where he worked on issues related to the No Child Left Behind Act and Head Start, and assisted in the formation and passage of the Higher Education Access Act.

### **7.4. Diversity Commitment**

CSI's commitment to diversity starts at the top with its board. This is reflected in CO Rev Stat § 22-30.5-505 (2016), which states: "the governor and the commissioner shall ensure the institute board reflects the geographic diversity of the state." CSI also has a nondiscrimination policy, in which one of the key objectives is to "encourage positive experiences in human values for children and adults who have differing personal and family characteristics or who come from various socioeconomic, racial, ethnic or gender groups." CSI continues to seek additional ways to expand its outreach to ensure that all have access to job opportunities.

## **8. Quality of the Project Evaluation**

A rigorous evaluation of the Tri-State Alliance project will be conducted by Parker Baxter and his team of the Center for Education Policy Analysis (CEPA) at the University of Colorado Denver School of Public Affairs (SPA). CEPA conducts research on local and national education innovations, convenes state and local practitioners and policy makers, and provides customized consulting, facilitation, and training services. CEPA's work focuses on education systems leadership, policy and finance, school and school district operations and governance, new school development, school choice, charter school oversight, parent and community engagement, performance management, and district-charter coordination.

CEPA's current projects include a multi-year quantitative and qualitative evaluation of a statewide collective impact initiative, research and analysis to support the Colorado Governor's Education Leadership Council in developing a statewide vision for education in Colorado from birth through adulthood, research on charter school finance, operations and governance, and the development of a new graduate-level training program in education systems leadership and policy designed for current and aspiring systems-level leaders and entrepreneurs.

Relevant past projects include strategic planning support for Colorado P-20 Council, support to Denver Public Schools on parent engagement and decision-making, school choice, school and student performance, transportation, central office redesign, teacher evaluation and compensation, and analysis of state, district and charter school finance data. The CEPA team and the School of Public Affairs also has extensive experience in directing and supporting federally funded K-12 evaluation projects, including projects focused on charter school policy. CEPA's director and team members have deep expertise in school choice, charter schools, and charter school authorizing and oversight. CEPA will approach this project through the lens of education

systems leadership and policy and as an opportunity for shared learning and continuous improvement for the Tri-State Alliance and for the charter sector more broadly.

CEPA's director, Parker Baxter, will serve as lead research consultant and will partner directly with leadership to design and conduct each stage of the evaluation. Baxter's expertise is detailed above. The CEPA Team, including Dean of the School of Public Affairs and Distinguished Professor, Paul Teske, Associate Dean Kelly Hupfeld, and Associate Professor Todd Ely will provide ongoing guidance on the project, and its cohort of education policy Masters and PHD candidates will assist with evaluation design, quantitative and qualitative data collection and analysis, and survey data and document collection and analysis.

The evaluation will use both quantitative and qualitative methods and will study the conduct and impact of the project, including all project objectives, tasks, outputs, and outcomes included in the logic model. In addition to documenting project activity by each state partner and CSI, the team at CEPA will also gather information through surveys and evaluations of materials, meetings, training sessions, and webinars conducted by each of the project partners. CEPA will survey and interview members of the state-partner organizations to gather information on: 1) their own practices, 1) their views of services, and 3) their views of the impact of the CACSA, FACSA, and CCAP and the Tri-State Alliance project.

To assess the impact of the Tri-State Alliance, CEPA will conduct an annual survey of school board members and superintendents in participating states and will provide data on the degree to which district leaders understand their role and obligations in implementing strong authorizing practices. These stakeholders will be treated as the recipient of authorizing services and surveyed to gather information on their perceptions regarding the quality of analysis, services, tools, procedures and policies adopted by their districts to oversee charter schools and

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make high-stakes decisions regarding charter schools. CEPA will also gather qualitative data on project effectiveness by interviewing board members and superintendents in participating states as well as reviewing a sample of charter contracts.

Because the State Boards of Education in the three states play roles in appeals and in evaluating charter quality, the evaluation will also survey or interview members of State Boards of Education to gather their perceptions on the rigor and quality of authorizers' coming before them in appeals processes or challenges of exclusive chartering authority.

To the extent that authorizers participating in this project are evaluated by NACSA and any other third-party evaluators, CEPA will seek evaluations reports and other material to study the quality of implementation of authorizer practices. Baxter and/or his team will attend the national meetings and some state-based events and observe conference calls and webinars. Project meetings, events, and webinars will include follow-up surveys or other data gathering, which will inform the evaluation as well as give us immediate feedback. In addition, the evaluation will incorporate quantitative data from NACSA survey of authorizers, using data on the adoption and use of NACSA's essential practices from all three states. State data on the performance of charter schools, openings, and closures will also be incorporated.

**8.1. Objective Performance Measures**

<b>Goal 1: Strengthen authorizing in states with predominantly district authorizers.</b>		
<b>Objectives</b>	<b>Measurement Tool or Method</b>	<b>Data Collection</b>

<p><u>Objective 1.1a:</u> By end of year 1, the Alliance will have completed a comprehensive analysis of the challenges faced by authorizers in each state and the existing and in-process charter school authorizing resources within the three states.</p>	<p>Document Review of meeting minutes from Core Project Team meetings &amp; CACSA, FACSA and CCAP meeting / analysis document.</p>	<p>Quarterly during year 1</p>
<p><u>Objective 1.1b:</u> By the end of year 1, we will have identified the highest needs and priorities in each state. Based on the analysis and the review of resources available in each state, we will identify the tools each state will need to create/adapt and implement by the end of the grant period to strengthen authorizing practices in their state.</p>	<p>Document Review of meeting minutes from Core Project Team &amp; CACSA, FACSA and CCAP meetings, highest needs and priorities document, &amp; plan for tools each state will create</p>	<p>Quarterly during year 1</p>
<p><u>Objective 1.1c:</u> By the end of year 2, each state will have created 2 or more new highest-need resources.</p>	<p>Document Review of resources created by each state</p>	<p>Twice a year during year 2</p>

<p><u>Objective 1.1d</u>: By the end of year 3, each state will have created a total of 4 or more new highest-need resources.</p>	<p>Document Review of resources created by each state</p>	<p>Twice a year during year 3</p>
<p><u>Objective 1.2a</u>: By the end of year 2, each state will have developed Professional Learning opportunities to share resources with districts and small/rural authorizers.</p>	<p>Document Review of Professional Learning curriculum</p>	<p>End of year 2</p>
<p><u>Objective 1.2b</u>: By the end of year 3, each state will have offered the Professional Learning opportunities 4 or more times to the target audience of districts and small/rural authorizers.</p>	<p>Document review of attendee lists &amp; pre/post surveys from each state</p>	<p>End of year 3</p>
<p><u>Objective 1.3</u>: By the end of the grant period, there will be a 5% increase in the number of districts in each of our states that either comply with 10 or more of NACSA’s 12 essential practices or, if a state-specific measuring tool is more appropriate, that comply by a similar proportion according to the state-specific metric.</p>	<p>NACSA State of Charter Authorizing Report or state-specific measuring tool</p>	<p>End of year 3</p>



**Goal 2: Educate districts and other key stakeholders about districts’ ongoing authorizing and oversight responsibilities under state law as an effective way to expand options for all students, thereby improving access and services for disadvantaged students, students with disabilities, and English Learners.**

Objectives	Measurement Tool or Method	Data Collection
<p><u>Objective 2.1a:</u> By end of year 1, each state will: 1) conduct a needs assessment to identify whether barriers exist that prevent district and small/rural authorizers from ensuring that their charter school portfolio adequately serves educationally disadvantaged students, 2) develop a plan to address the findings from the needs assessment, and 3) share this information with appropriate stakeholders.</p>	<p>Document Review of meeting minutes from CACSA, FACSA and CCAP meetings / needs assessment document / plan document.</p>	<p>Quarterly during year 1</p>
<p><u>Objective 2.1b:</u> By the end of year 1, each state will have put its plan into action. At the end of years 2 and 3, the states will provide a cross-state summative report to determine the efficacy of this plan.</p>	<p>Document Review of meeting minutes from CACSA, FACSA and CCAP meetings / summative report</p>	<p>End of years 2 &amp; 3</p>

<p><u>Objective 2.2:</u> By the end of the grant period, district and small/rural authorizers in Colorado, Florida, and California will report a 15% increase in the implementation of best-practice tools that specifically support the needs of students with disabilities, English Learners, and other disadvantaged students.</p>	<p>Surveys of superintendents and school boards, document review of charter contracts</p>	<p>Annual progress check</p>
<p><u>Objective 2.3:</u> By the end of the grant period, charter schools in Colorado and Florida will close the gap in enrollment of students with disabilities between charters and traditional public schools by 43% and 66%, respectively.</p>	<p>Colorado and Florida Department of Education data</p>	<p>End of year 3</p>
<p><u>Objective 2.4:</u> By the end of the grant period, California charter schools will close the gap in enrollment of English Learners between charters and traditional public schools by 50%.</p>	<p>California Department of Education Data</p>	<p>End of year 3</p>

**Goal 3: Engage and provide support to a larger proportion of district authorizers in Colorado, Florida, and California, including small and rural districts and districts that authorize a significant number of charter schools experiencing significant low performance or non-compliance with academic, financial, governance, or operational requirements (“high-need” districts).**

Objectives	Measurement Tool or Method	Data Collection
<p><u>Objective 3.1:</u> By the end of year 1, each state will 1) conduct a needs assessment to identify which districts authorize a significant number of charter schools experiencing significant low performance or non-compliance with academic, financial, governance, or operational requirements, 2) measure how engaged these districts are with the state association, and 3) invite the unengaged districts to get involved with CACSA, FACSAs or CCAP.</p>	<p>Document Review of meeting minutes from CACSA, FACSAs and CCAP meetings / needs assessment document.</p>	<p>Quarterly during year 1</p>
<p><u>Objective 3.2:</u> By the end of years 2 and 3, there will be a 10% (year 2) and 15% (year 3) increase in district authorizers that are engaged with CACSA, FACSAs, and CCAP, including small/rural and high-need districts.</p>	<p>Document Review of meeting attendance at CACSA, FACSAs and CCAP meetings.</p>	<p>Annually years 2 &amp; 3</p>

<p><u>Objective 3.3</u>: By the end of the grant period, district authorizers in Colorado, Florida, and California, including high-need and small/rural districts, will report a 15% increase in the implementation of best-practice tools that strengthen charter school authorizing and oversight.</p>	<p>Surveys of superintendents and school boards / document review of charter contracts</p>	<p>Progress check annually</p>
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<p><b>Goal 4: Support states outside the Tri-State Alliance that seek to establish statewide associations for charter authorizers.</b></p>		
<p><b>Objectives</b></p>	<p><b>Measurement Tool or Method</b></p>	<p><b>Data Collection</b></p>
<p><u>Objective 4.1</u>: By the end of year 1, each state will have identified and invited 5 authorizers from states outside the Tri-State Alliance to attend a CACSA, FACSA, or CCAP meeting or a core project team meeting.</p>	<p>Document review of CACSA, FACSA and CCAP meeting minutes.</p>	<p>Quarterly during year 1</p>

<p><u>Objective 4.2:</u> By the end of the grant period, members of CACSA, FACSA, or CCAP will have provided a combined total of 75 hours of mentoring support (including participation in meetings) for states outside the Tri-State Alliance that seek to establish their own statewide charter authorizer associations.</p>	<p>Document review of: meeting attendance and time tracking sheets</p>	<p>Annual progress check</p>
<p><u>Objective 4.3:</u> As they are available, the best-practice resources created by the Tri-State Alliance will be accessible on each state association’s website, and by the end of the grant period, all 12+ best-practice resources will be available on each state association’s website.</p>	<p>Document review of CACSA, FACSA, and CCAP websites</p>	<p>Annual progress check</p>

**8.2. Quantitative and Qualitative Data**

Substantial effort will be made to insure data accuracy and integrity. The evaluation plan and methodology will provide valid and reliable performance data on relevant outcomes. All data will be analyzed to determine the impact of the Tri-State Alliance on district and small/rural authorizers and their authorizing practices. The quantitative data analysis process will utilize both t-tests and analysis of variance (ANOVA) as appropriate to determine the significance of differences between pre and post assessment data. Both descriptive and content analysis will be used with qualitative data. The surveys and interviews will be examined for themes and patterns determining issue relevant meanings. Triangulation across different methods will be used to confirm findings.

The analysis and interpretation of all collected data will be used to answer the extent to which goals and objectives have been attained. Frequent written and oral reports will be provided for the Core Project Team and members of CACSA, FACSA, and CCAP to assist with debriefing and ongoing program decisions. Comprehensive annual evaluation reports will be provided for all stakeholders and include recommendations for future development and project course corrections.

## **9. Works Cited**

Center for Reinventing Public Education. (2017). *Bridging the District-Charter Divide to Help More Students Succeed.*

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