

Creating Model Tools and Templates to Help District Authorizers

Tri-State Alliance
to Improve District-Led Charter Authorizing

Tuesday, October 20, 2020
2:45 pm to 4:00 pm, CST



Tri- State Alliance

Who We Are

3 state-based
associations
of charter
school
authorizers

Where We Are

In states
where
districts do
the bulk of
the
authorizing

What We Do

Working to
support
improved
authorizing
practices in
our states

Reaching Out

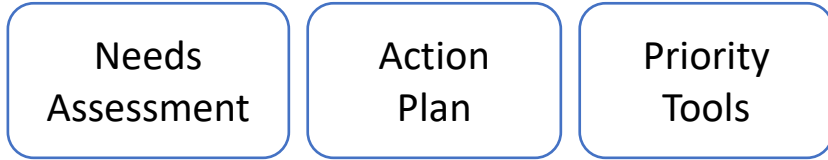
May support
other states'
authorizers
and those
interested in
strengthening
practice

Speakers/Facilitators

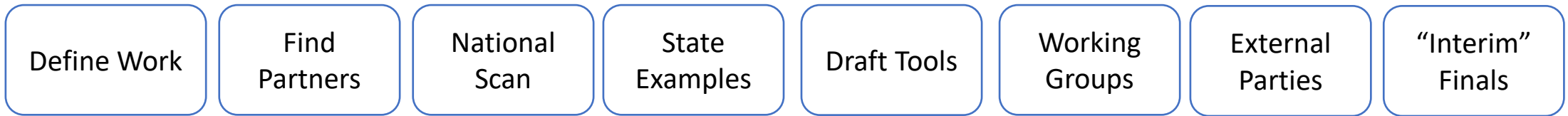
- Melissa Brady, Florida Association of Charter School Authorizers
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- Tom McMillen, Jefferson County School District, Colorado
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- David Patterson, California Charter Authorizing Professionals
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Process of Creating State-Specific Tools

Year 1

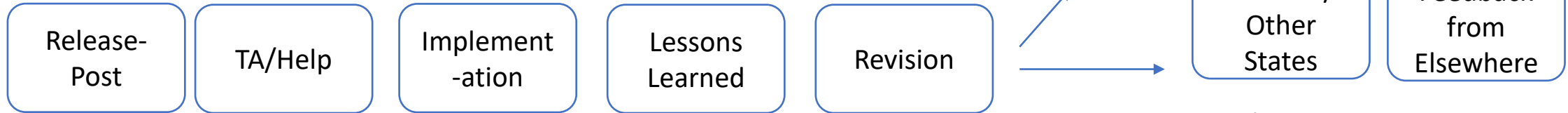


Year 2



Design/Procurement → Research → Feedback →

Year 3



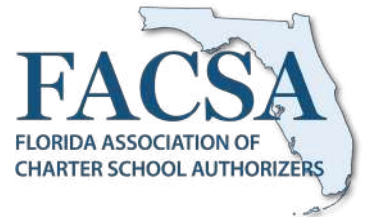
Dissemination →

Dialogue w/ other states →

State-Specific Priority Tools

Year	CCAP	CACSA	FACSA
Last Year	<ol style="list-style-type: none"> 1. Petition (Application) Review Toolkit 2. EL Component of Toolkit 3. Annual School Report Toolkit 	<ol style="list-style-type: none"> 1. Annual Report to Charter School and Supporting Performance Framework 2. Site Visit Rubric 3. Model Charter Contract 4. Revised Standard Application Package and Rubric 	<ol style="list-style-type: none"> 1. Annual Evaluation Rubric 2. Annual Report to Charter School 3. Annual Opening Operation Checklist
This Year	<ol style="list-style-type: none"> 1. Standard Charter MOU (like a charter contract) 2. Toolkit for Supporting Authorizers with Underperforming Portfolios 	<ol style="list-style-type: none"> 1. Renewal Package 2. Year Zero Guide 3. Special Education MOU 	<ol style="list-style-type: none"> 1. Renewal Package 2. Year Zero Guide
Later	<ol style="list-style-type: none"> 1. Evaluation of Alternative Education Schools 		

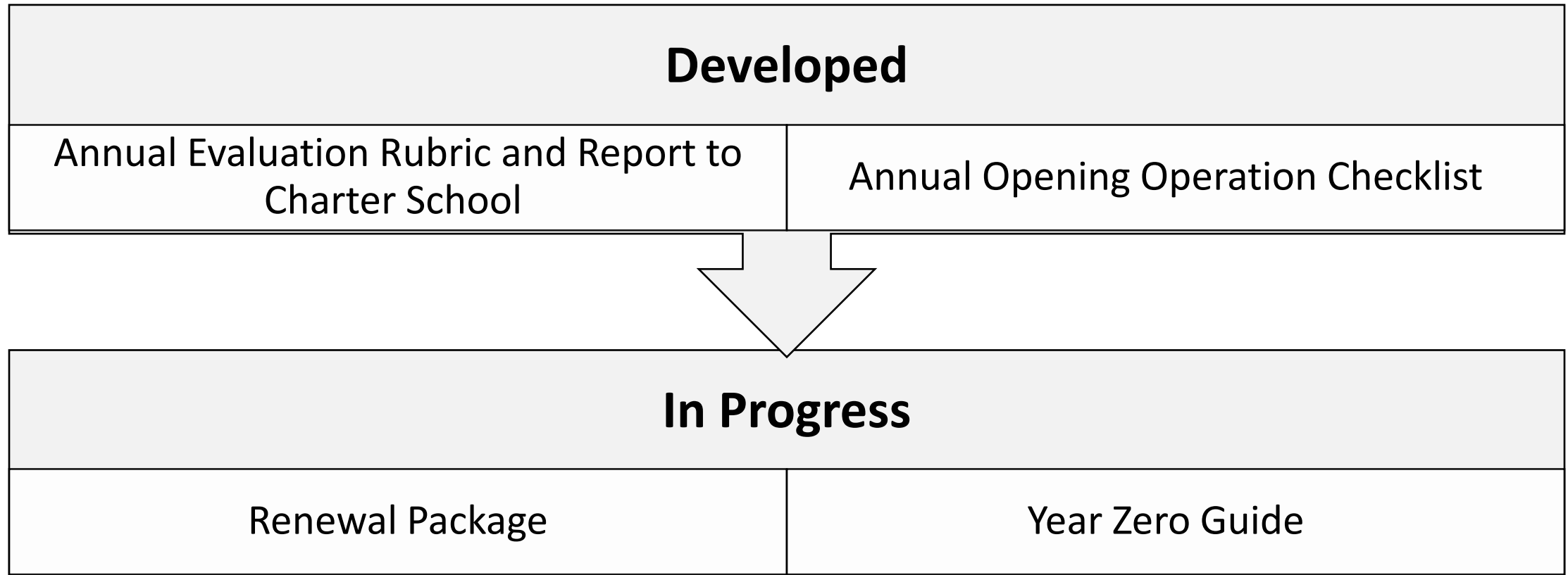
Zoom Poll



Zoom Poll

- **In your authorizing and oversight work are you currently using forms/templates created by other authorizers or organizations?** (1 – not at all, 2 – a few, 3 – several, 4 – many, 5 – all or almost all)
- **As you review templates/forms from other organizations for your possible use, how helpful have you found templates/forms that are not specific to your state?** (1 – not helpful at all, 2 – helpful in a limited way, 3 – sometimes helpful, sometimes not, 4 – constantly helpful, 5 – always helpful)
- **Do you have an organization or structure in your state to create or customize tools for your use and use by other authorizers in your state?** 1 – no, not at all, 2 – some occasional coordination, 3 – ongoing organization and/or cooperation, 4 - consistent organization and/or cooperation, 5 – strong organization and/or cooperation.

FACSA Model Materials



Annual Evaluation Rubric & Report to Charter School

Consolidated suite
of materials
communicating
charter school's
performance:
Academic, Financial,
and Operational

Purpose

To evaluate the charter school's compliance and performance standards linked to the Florida Statutes and/or Model Contract

Purpose

May provide feedback and inform high stakes decisions, like renewal; trigger tiered interventions; support school improvement

Purpose

Disseminate information and deepen public understanding.

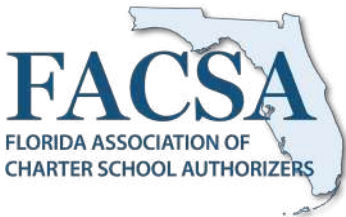
Rubric

1. Intended to be a resource for authorizers across Florida
2. Standardizes practice across counties
3. Elevates authorizing practice

Rating Rubric

This section of the rubric summarizes the ratings that FACSA recommends are publicly reported and how they will be calculated. The indicators that will inform these are outlined in the next section of the rubric. Individual authorizers have the flexibility to publicly report at whatever level is most appropriate for their particular context.

	Exceeds Expectations	Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	N/A
Definition	School achieves strong outcomes for students and is well-managed and sustainable for the foreseeable future.	School generally achieves strong outcomes for students and is generally well-managed and sustainable for the foreseeable future.	School meets student needs and meets basic operational requirements and measures of organizational health.	The school does not achieve strong academic outcomes and/or does not have these organizational systems in place to ensure continued operation.	The school does not have sufficient data.



Rubric Ratings

Summarizes the ratings that FACSA recommends are publicly reported and how they will be calculated.

- **Overall**
- **Academic Performance**
- **Financial Performance**
- **Operational Performance**
- **Compliance**

Indicators

Indicators within each category used to calculate the ratings summarized in the prior section.

- **Financial Performance Framework**
- **Operational Performance Framework**
- **Compliance Framework**

About the School



Grades Served	6th - 8th
Opening Year	2002
Current Contract	2016-2020
School Leader	Maya Lagana
Board Chair	John Smith
Mgmt Company	N/A

School Enrollment History			
Population Group	2019-20	2018-19	2017-18
Total Enrollment	400	397	357
% Economically Disadvantaged	54%	52%	49%
% English Language Learners	12%	11%	10%
% Minority	44%	43%	46%
% Students with Disabilities	12%	11%	9%

Key Performance Indicators				
Category	Indicator	2019-20	2018-19	2017-18
Academic	Percent Proficient-ELA	42%	40%	44%
	Percent Proficient-Math	62%	54%	60%
	Graduation Rate	N/A	N/A	N/A
	Dropout Rate	N/A	N/A	N/A
Financial	Current Ratio	1.03	1.02	0.98
	Total FEFP Received	\$2,598,848	\$2,848,674	\$2,583,44
	Year End Fund Balance	\$62,329	\$53,432	\$12,/

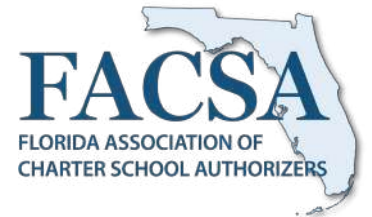


Annual Report

One-page report with at-a-glance information

Annual School Performance Evaluation: For more information on this process please visit our website. More details on school performance relative to this measure can be found here.

Category	2019-20	2018-19	2017-18
Overall Performance	Meets Expectations	Meets Expectations	Meets Ex
Academic Performance	Partially Meets Expectations	Meets Expectations	Partially Meets
Operational Performance	Meets Expectations	Meets Expectations	Meets Ex
Financial Performance	Does Not Meet Expectations	Partially Meets Expectations	Meets Ex
Compliance	Meets Expectations	Meets Expectation	Meets Ex
Contract Performance Goals	Does Not Meet	Meets Expec	Meets Ex



Annual Opening Operation Checklist

Opening checklist for authorizers to use at the beginning of school year

Areas reviewed:

- Governance
- Finance
- Staff
- Safety
- Academics
- Special Populations
- Operations
- Enrollment
- Facility

School Leader Guidance: This checklist is intended to demonstrate to your authorizer that your schools are prepared to open for the upcoming school year across all domains, including safety, compliance, operations, facility, and finances. Please complete each section and sign at the end, attesting that you have truthfully completed this form.

Category	Item	Checklist	Any Notes (Optional)
Governance	All board members have up to date fingerprinting and background checks.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
	Board members have participated in a training in compliance with the requirements of Section 1002.33(9)(j)(5), including government in the sunshine, conflicts of interest, ethics, and financial responsibility.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
	A schedule of all board meeting dates is established, including date, time, and location.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
	A full list of board members is updated and on file with the authorizer.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
	Board meeting minutes are posted on the website regularly.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
	The board has updated bylaws in compliance with all applicable laws and regulations.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	



Materials in Development

Renewal Package

The annual report should inform high stakes decision making and charter renewal.

Will consider differentiated approach to evaluating the high-performing charter versus non-high-performing.

Current best practices will inform the work

Year Zero Guide

Roadmap to assist authorizers navigate essential activities after a charter application is approved

Statutory requirements and district processes drive the development of this tool

Includes implementation timeline, district resources, and professional development opportunities

CACSA Tools:

Updated	Newly Developed	In Process
Application Package Application Rubric	Annual Report Template (with performance framework)	Model Contract
	Site Visit Rubric	Special Education MOU



CACSA: Annual Report Template

- Excel version shows how it works
- Power Point Version readily manipulated by users
- Rubric tracks NACSA Performance Frameworks (mostly)
- Authorizers must make judgement decisions in design how sections “roll up”
- Final form also allows difference in emphasis

Category	Sub-Category	Standard	Rubric			Rating (2018-19)	Rating (2019-20)	Rating (2020-21)
			Does Not Meet	Approaching	Meets			
Academic	State Measures [COLLECT RATINGS FROM SINGLE YEAR SPPs ON CDE WEBSITE]	CDE-Determined Accreditation Status						
		CDE-Determined Academic Achievement for All Students						
		CDE-Determined Academic Achievement for Minority Students						
		CDE-Determined Academic Achievement for Economically Disadvantaged Students						
		CDE-Determined Academic Achievement for Students with IEPs						
		CDE-Determined Academic Achievement for Students who are English Learners						
		CDE-Determined Academic Growth for All Students						
		CDE-Determined Academic Growth for Economically Disadvantaged Students						
		CDE-Determined Academic Growth for Students with IEPs						
		CDE-Determined Academic Growth for Students who are English Learners						
		CDE-Determined Postsecondary & Workforce Readiness for All Students						
		CDE-Determined Postsecondary & Workforce Readiness for Minority Students						
		CDE-Determined Postsecondary & Workforce Readiness for Economically Disadvantaged Students						
		CDE-Determined Postsecondary & Workforce Readiness for Students with IEPs						
		CDE-Determined Postsecondary & Workforce Readiness for Students who are English Learners						
Academic	District Measures	Authorized-Determined School Specific Measure #1	District must develop as appropriate	District must develop as appropriate	District must develop as appropriate	District must develop as appropriate		
		Authorized-Determined School Specific Measure #2	District must develop as appropriate	District must develop as appropriate	District must develop as appropriate	District must develop as appropriate		
		Authorized-Determined School Specific Measure #3	District must develop as appropriate	District must develop as appropriate	District must develop as appropriate	District must develop as appropriate		
		Authorized-Determined School Specific Measure #4	District must develop as appropriate	District must develop as appropriate	District must develop as appropriate	District must develop as appropriate		
		Domain Rating for Academic Performance	Each authorizer needs to determine how to roll-up the individual standard ratings to a comprehensive domain rating. We recommend the use of a four-point rubric for this domain.					
Governance	Governance	Board has no evidence of violations of CO ethics laws	Evidence of egregious, repeated, and/or unresolved non-compliance with CO ethics laws	N/A	Board is in compliance with Colorado ethics laws based on all available evidence.	N/A		
		Board has no evidence of violations of legal and contractual obligations	Evidence of egregious, repeated, and/or unresolved non-compliance with legal and contractual obligations	N/A	School is not currently in breach of any legal or policy expectations and within the current charter term has not been found to have committed an egregious or repeated violations of relevant law and policy expectations	N/A		



Main Street Academy

123 Main Street, Local City, CO 12345 // (210) 555-1212
Grades 1-5 // Enrollment 300



Authorizer Name					
School Name					
Management Company					
Board President	Grades Served	Enrollment	% FRL/ED	% IEP	% EL

Overall Performance			
Overall Assessment of Performance and Compliance	2018-19	2019-20	2020-21
Domain Rating for Academic Performance	Partially Meets	Partially Meets	Meets
Domain Rating for Board Governance	Meets	Meets	Does Not Meet
Domain Rating For Legal and Contractual Compliance	Meets	Does Not Meet	Meets
Domain Rating for Financial Performance	Does Not Meet	Meets	Meets
Is the school in good standing based on a review of all domains?	No	No	Yes

Board Governance			
Expectations for Board Governance	2018-19	2018-20	2018-21
Board has no evidence of violations of CO ethics laws.	Meets	Meets	Meets
Board has no evidence of violations of legal and contractual obligations.	Meets	Meets	Meets
Board complies with all open meetings laws/CO Sunshine Laws.	Meets	Meets	Meets
Board satisfies all relevant training obligations including those for new members.	Meets	Meets	Does Not Meet
Domain Rating for Board Governance	Meets	Meets	Does Not Meet

Legal and Contractual Compliance			
Expectations for Legal and Contractual Compliance	2018-19	2019-20	2020-21
Reporting Compliance: The school is complying with laws, rules, regulations, and provisions of the charter contract relating to relevant reporting requirements to the authorizer.	Meets	Does Not Meet	Meets
Required Programming: School implements mandated programming, including Colorado History, Alcohol & Controlled Substances, Constitution Day, and Comprehensive Human Sexuality Education.	Meets	Meets	Meets
School Environment and Discipline: School uses discipline practices that comply with policy and legal expectations and provide students and families with due process	Meets	Meets	Meets
Special Student Populations: School materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the treatment of students with identified disabilities and those suspected of having a disability.	Meets	Meets	Meets
Student Enrollment: School materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to admissions, lottery, waiting lists, recruitment, and enrollment.	Meets	Meets	Meets
Domain Rating For Legal and Contractual Compliance	Meets	Does Not Meet	Meets

Financial Performance			
Expectations for Financial Performance	2018-19	2019-20	2020-21
Liquidity: Current Assets Ratio	Meets	Meets	Exceeds
Liquidity: Unrestricted Days Cash	Meets	Meets	Partially Meets
Sustainability: Loan/Debt Service Payments	Meets	Meets	Meets
Sustainability: TABOR Requirements	Does Not Meet	Meets	Meets
Annual Independent Audit	Meets	Meets	Meets
Domain Rating For Financial Performance	Does Not Meet	Meets	Meets

Main Street Academy

123 Main Street, Local City, CO 12345 // (210) 555-1212
Grades 1-5 // Enrollment 300



Academic Performance			
Measures of Academic Performance	2018-19	2019-20	2020-21
CDE-Determined: Accreditation Status	Does Not Meet	Partially Meets	Partially Meets
CDE-Determined: Academic Achievement for All Students	Partially Meets	Partially Meets	Partially Meets
CDE-Determined: Academic Achievement for Minority Students	Meets	Meets	Meets
CDE-Determined: Academic Achievement for Economically Disadvantaged Students	Meets	Meets	Meets
CDE-Determined: Academic Achievement for Students with IEPs	Meets	Meets	Meets
CDE-Determined: Academic Achievement for Students who are English Learners	Meets	Meets	Meets
CDE-Determined: Academic Growth for All Students	Partially Meets	Partially Meets	Partially Meets
CDE-Determined: Academic Growth for Minority Students	Meets	Meets	Meets
CDE-Determined: Academic Growth for Economically Disadvantaged Students	Meets	Meets	Meets
CDE-Determined: Academic Growth for Students with IEPs	Meets	Meets	Meets
CDE-Determined: Academic Growth for Students who are English Learners	Meets	Meets	Meets
CDE-Determined: Postsecondary & Workforce Readiness for All Students	Meets	Meets	Meets
CDE-Determined: Postsecondary & Workforce Readiness for Minority Students	Meets	Meets	Meets
CDE-Determined: Postsecondary & Workforce Readiness for Economically Disadvantaged Students	Meets	Meets	Meets
CDE-Determined: Postsecondary & Workforce Readiness for Students with IEPs	Meets	Meets	Meets
CDE-Determined: Postsecondary & Workforce Readiness for Students who are English Learners	Meets	Meets	Meets
Authorized-Determined: School Specific Measure #1	Exceeds	Partially Meets	Exceeds
Authorized-Determined: School Specific Measure #2	Meets	Meets	Meets
Authorized-Determined: School Specific Measure #3	Partially Meets	Partially Meets	Does Not Meet
Authorized-Determined: School Specific Measure #4	Partially Meets	Does Not Meet	Meets
Domain Rating for Academic Performance	Partially Meets	Partially Meets	Meets

PLACEHOLDER FOR INFO ABOUT SCHOOL –
MAYBE LEADERSHIP, MEMBERS OF BOARD OF DIRECTORS, MAYBE MISSION AND EDUCATIONAL MODEL?



CACSA: Site Visit Rubric



- Comprehensive
- Multiple strategies to gather data
- Designed to complement Annual Report

REVIEW PROTOCOL: Below are the steps required to collect all information needed to evaluate the school on each review topic.

Review Topic	School Walk-Through	Classroom Observation	Document Review	Board Interview	SL Interview
Instruction	✗	✓	✗	✗	✗
Educational Program: Curriculum/Materials	✗	✓	✓	✗	✓
School Culture & Discipline	✓	✓	✓	✗	✗
Board Governance	✗	✗	✓	✓	✗
Board Legal Obligations	✗	✗	✓	✓	✗
Safety	✓	✗	✓	✗	✗
Special Education Files	✗	✗	✓	✗	✓



CACSA: Updated Application & Rubric

- Updated 2018 version
- Based on new experience
- NACSA/Boulder questions on Education Management Partners
- Attention to students with disabilities based on NACSA/National Center for Special Education in Charter Schools Toolkit
- Contains call outs for CSP grant eligibility, and Colorado League of Charter Schools



Model Contract & SPED MOU

- Based on analysis and side-by-sides of 2014, 2019 state models, and DPS and CSI current contracts
- Modeling on special education MOU implemented by CSI
- Still underway



Great Tools are Half the Job: Professional Development is Critical

- Tri-State Alliance is creating excellent tools
- Authorizer Professionals Need Professional Development
 - Inform them of the new tools
 - Demonstrate how the tools will improve educational quality
 - Provide training needed to develop proficiency in their use
 - Embed them into the authorizer's practice

CCAP's Focus on Professional Development

- Series of Six Training Events at Five Locations Throughout State for Authorizing Professionals
- Workshops specifically designed for School Board (and Superintendents)
- Informational Workshops for Charter School Leaders
- Development of a Certificate Program for Authorizing Staff
- Funded by the Charles and Helen Schwab Foundation

Moderated Discussion using the Chat Function



Tri-State Goal:

- To support other states that want to implement a similar strategy or borrow tools
- Available to share materials
- Partner as mentors in designing similar approach in other states

To find examples, visit our resource libraries



CALauthorizers.org



COauthorizers.org



FLAuthorizers.org