



CALIFORNIA
CHARTER
AUTHORIZING
PROFESSIONALS

Conference Schedule

Monday, June 16, 2025

9:00 AM – 5:00 PM: CASI Preconference on Charter Authorizing & Oversight 101 (optional event)

- Stand-alone, optional preconference. An overview of charter authorizing through the charter school life cycle and an orientation to the rest of the conference program for those who are new to authorizing, who could use a refresher, or whose experience so far relates to only part of the range of authorizing responsibilities. The preconference is presented by the Charter Authorizer Support Initiative ([CASI](#)), a collaboration among the California Department of Education (CDE), CCAP, and the Santa Clara County Office of Education's Charter Schools Department. The separate fee for this stand-alone option is just \$50.

5:30 PM – 7:00 PM: Meet-and-Greet

Sponsored by [School Services of California, Inc.](#)

Tuesday, June 17, 2025

7:30 AM – 8:45 AM: Breakfast & Conference Welcome

- **Welcome and Some Introductions**
- **Announcements**

8:45 AM – 9:00 AM: Break

9:00 AM – 10:00 AM: Presentations Block 1

- **The Renewal Petition Process in SY 2024-25: What Have We Learned?**
After the long hiatus from renewals, what trends, legal issues, appeal decisions, etc., have we seen so far as authorizers implement AB 1505? Based on this, what trends do we expect to see in the future? In hindsight, what are the statewide issues that authorizers should be thinking about as more renewal petitions are set to arrive in the coming school years? Come find out and discuss solutions.

- **An Introduction to Financial Oversight**
Gain a solid overview of the fundamentals of financial oversight of charter schools, as well as a review of CCAP’s relatively simple but effective Financial Health and Sustainability Framework, which can be customized by the authorizer — and can be a good resource for charter schools as well.
- **The School Board’s Role in Authorizing**
The high-stakes decisions in charter authorizing, including petitions for new schools, renewals, appeals, material revisions, and sometimes revocations, rest with the district or county board of education. Boards that fail to follow legal requirements and sound authorizing practices expose their budgets to serious risk. Tough policy issues include renewals, community and fiscal impact, equitable access and representative enrollment, fraud prevention, declining enrollment, and polarized politics. This overview session will highlight changes in law, practical board tips and resources, and current policy discussions and legislative proposals about authorizing. The successful board authorizing practices highlighted will include the Alameda County Board of Education’s especially robust approach to its authorizing role. The session is especially designed for board members, but informative for everyone.
- **Oversight of Special Education and Engagement Between Authorizer and SELPA**
Review a resource listing and focusing on the most important areas of authorizer attention in special education and discuss ways in which the work of the authorizer and the Special Education Local Planning Area (SELPA) can be complementary, rather than duplicative.

10:00 AM – 10:15 AM: Break

10:15 AM – 11:15 AM: Presentations Block 2

- **Essentials of Charter School Oversight: Steps, Timelines, and Document Collection and Review**
This workshop will equip charter authorizers with essential strategies for effective documentation collection and management throughout the oversight process, covering both statutory requirements and recommended best practice materials. Participants will explore structured timelines for documentation collection, frameworks for evaluating submission completeness, and practical approaches to address oversight challenges before renewal

or revocation considerations. Through guided discussions and case exercises, participants will leave with actionable strategies to enhance their documentation systems, fulfill core oversight responsibilities, and maintain compliance with all legal obligations.

- **Dependent Charters: Where They Fit into the Authorizer Landscape**

Although the term “Dependent Charter” does not appear in the Education Code, some authorizers Statewide have created and operated dependent charter schools since the inception of the Charter Schools Act. Without a fixed definition, statewide practice varies in terms of what makes a charter “dependent” and what that looks like. Discuss the most common indicators of what constitutes a dependent charter, best practices, and cautionary tales.

- **From Oversight to Insight: Piloting a Data Learning Network for Charter Schools in Riverside County**

Hear about an exciting research project that rigorously evaluates an initiative structured to increase data access, knowledge, and use among charter leaders, part of Riverside County’s responsive framework for collaborating with charter schools. Unpack the mid-study findings and examine their impact on data use, charter school renewal, and oversight. Engage in a dynamic discussion and gain actionable insights to leverage evidence for more effective oversight.

- **Start-up Charter Schools: Monitoring, Case Studies, and Ghost Stories! What Happens with Grant Funds When Things Hit the Skids?**

One of the charter schools in your authorizing portfolio was awarded a California Department of Education (CDE) Public Charter Schools Grant Program (PCSGP) Start-Up subgrant. What are your responsibilities for monitoring? What steps do you need to take to make sure the CDE is aware of any issues? What happens if the school closes? Come find out!

11:15 AM – 11:30 AM: Break

11:30 AM – 1:15 AM: Lunch & First Plenary Session

Sponsored by [Reportwell](#)

- **Presentation of the [2025 California Authorizing in Community Contributor Award and the Authorizing Exemplar Award](#)**
- **Panel Discussion: The California Authorizing Landscape and Outlook**

1:15 PM – 1:30 PM: Break

1:30 PM – 2:30 PM: Presentations Block 3

- **Scaling Success: How Small Authorizers Build Compliant, Trust-Based Charter Oversight**
Learn how small authorizers can meet rising compliance demands while building strong, trust-centered relationships with the charter schools they oversee, from a panel featuring superintendents and charter leaders who have built durable, collaborative relationships across multiple districts. Discuss real-world strategies for maintaining compliance without losing the relationship focus that drives long-term success, as well as CCAP resources for small authorizers.
- **Unlocking Potential: Optimizing Charter Performance with Differentiated Oversight**
Explore how differentiated oversight—tailored to school performance—can drive better outcomes. Examine, through case studies, how adjusting oversight based on performance can lead to measurable improvements. Identify one key issue facing one of your charters and consider how your approach to oversight might evolve. Leave with concrete ideas to implement differentiated oversight that supports school improvement while maintaining accountability.
- **Fraud Prevention: Self-Help for Authorizers and Charter Schools**
Review the recommendations of the broad-based Anti-Fraud Task Force convened by CCAP for how charter schools, authorizers, and all LEAs can help protect themselves against fraud. Learn about the latest state legislation focusing on fraud prevention. And hear about the current collaborative efforts among local authorizer and charter school volunteers to develop models and supports to make implementing the Task Force recommendations easier for everyone.
- **When Oversight Gets Tricky: A Real-World Discussion of Charter Oversight Challenges**
Discuss the various circumstances that trigger oversight-related intervention, from requests for information to notices of violation, as well as best practices for addressing challenging oversight matters. Gain an understanding of authorizer oversight obligations and valuable information on appropriate responsive actions to take when a problem arises.

2:30 PM – 3:00 PM: Break

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3:00 PM – 4:00 PM: Presentations Block 4

- **Visiting with Purpose: Making Annual Site Visits an Important Part of Your Oversight**
Review example processes and resources for ensuring that each charter school's annual visit is productive, informative, and an essential part of the annual review process. Learn how digital tools such as Google Forms and ChatGPT can create structure and processes you can use prior to, during, and after site visits to get the most value from each visit.
- **Hard Calls & New Norms: Lessons from a Year in Charter Authorization**
Charter authorizing often demands a balance between accountability, equity, and innovation—but what happens when difficult decisions test those boundaries? In this session, a county-level charter authorizer shares real-world lessons from the past year, including the facilitation of a charter school closure and transition back to a neighboring district, the controversial denial of a high-performing charter, and other complex scenarios. Through these cases, participants will explore what it means to lead with integrity, center community impact, and evolve authorizing practices in response to shifting political, academic, and operational landscapes. Come ready to reflect, question, and connect.
- **Charter Schools and English Language Development: What's the Deal?**
Authorizer oversight of charter school English Language Development (ELD) programming involves ensuring compliance with legal standards, fostering effective curriculum and instruction, monitoring student progress, and providing targeted supports for all learners, including those with special needs or in secondary education. Learn about what is required of charter schools with regard to ELD, why it is required, and what it looks like in practice.
- **Bring Your Own Financial Documents! One-on-One Consultation**
Bring financial documents that you are reviewing, along with your questions, and consult individually with people who have deep experience in the financial oversight of charter schools!

4:00 PM – 4:15 PM: Break

4:15 PM – 5:15 PM: Role-Alike Meetings

- **Role-alike meeting! County Offices of Education – County Charter Authorizing Representative Collaborative (CCARC) in-person meeting**
Hosted by Dr. Jeffrey Hunt, Office of Fresno County Superintendent of Schools, and Angel Arrington, Office of San Bernardino County Superintendent of Schools
- **Role-alike meeting! Larger/more urban school districts**
- **Role-alike meeting! Smaller/more rural school districts**
- **Role-alike meeting! Non-authorizer partners (charter schools, charter management organizations, back office providers, attorneys, consultants, vendors, associations, *et al.*)**

5:15 PM – 5:30 PM: Break

5:30 PM – 7:00 PM: Reception & Networking

Sponsored by [National Charter Schools Institute](#) | [Epicenter](#)

Wednesday, June 18, 2025

7:30 AM – 8:45 AM: Breakfast & Day's Opening

Sponsored by [Lozano Smith Attorneys at Law](#)

8:45 AM – 9:00 AM: Break

9:00 AM – 10:00 AM: Presentations Block 5

- **Charter Revocation: Case Studies, Best Practices, and Cautionary Tales**
Review the fundamental legal requirements for a successful revocation, and strategies for oversight and documentation of charter school performance, evaluating remedies, and presenting the authorizer's revocation case to its board. Also discuss post-revocation closure procedures, including the oversight of wrapping up charter school operations, transfer of educational and business records, and reconciling financial obligations.
- **Overseeing and Engaging Charter School Governance**
Behind almost every charter school revocation, nonrenewal,

voluntary closure, or fiscal integrity problem is a failure of governance. And behind charter school governance failures often is inadequate attention to charter governing boards by their authorizers. Effective authorizer engagement with governing boards can improve school-authorizer relationships and build trust, help protect the school, and lead to improved school performance—without compromising the school’s autonomy. This session will review the basic legal requirements for the charter school’s governing board and the authorizer’s related oversight responsibilities. Beyond legal requirements, the session will explain other reasonable expectations and suggestions for school governance and for authorizer engagement with the school’s governing board.

- **Financial Oversight “At the Bookends”: Startup (“Year Zero”) and Closure**

Learn about fiscal requirements of pre-opening charter schools and related authorizing responsibilities even before the school begins receiving LCFF funding. Review the authorizer’s financial tasks and practices in a closure — including the closure of a school that has failed even to progress successfully through “Year Zero” to opening.

- **Collecting Student Exit Data for Effective Oversight**

Explore the process of collecting, analyzing, and utilizing student exit data to strengthen oversight. Examine the development of a student exit template, methods used to collect data from schools, and a student exit dashboard tool over time. Take part in an activity of collecting the information needed to begin laying the foundation for their own student exit review process.

10:00 AM – 10:30 AM: Break (extra time for hotel checkout if needed)

10:30 AM – 11:30 AM: Presentations Block 6

- **Renewal Report Exchange: A Workshop for Shared Learning and Development**

Go through a staff renewal report development process, exchanging examples and insights into work to ensure documents are not only a legal tool but also authentic reflections of the community’s values and priorities. Conclude with some collaborative time where participants can work through their own staff report challenges and exchange practical insights about successful strategies and lessons learned from the 2024-25 renewal cycle.

- Maximizing and Navigating the California Statewide System of Support Resources and Understanding CCEE Direct Technical Assistance Eligibility**

Join the California Collaborative for Educational Excellence (CCEE) for an introduction to the comprehensive supports and resources available to LEAs through the Statewide System of Support (SSOS), the pathways to Differentiated Assistance (DA) and Direct Technical Assistance (DTA) for charter schools, and, through a collaborative discussion, what it means to qualify for DTA and how these supports can be leveraged to foster improvement and success across LEAs.
- Tracking Authorizing Expenditures for Calculating Oversight Fees**

As policymakers consider raising the oversight fees authorizers can charge charter schools — but also consider requiring that annual audits of authorizing entities include calculations of authorizing expenditures — come compare notes about how other authorizers track their staff time and other expenses to support the calculation of their current fees.
- Nonclassroom-Based Schools: Authorizing Amid Policy Changes and Debates**

As the moratorium on new nonclassroom-based charters is set to expire, and as changes to the funding and oversight of these schools are being considered by state officials, discuss how authorizing and oversight of them is similar and different from that of other charters, how to address some of the challenges, and what changes may be coming your way.

11:30 AM – 11:45 AM: Break

11:45 AM – 1:30 PM: Lunch & Closing Plenary Session

- Panel Discussion: The National Authorizing Landscape and Outlook**

1:30 PM – 1:45 PM: Break

1:45 PM – 4:00 PM: Optional Deeper Dives & Collaborative Opportunities (included)

- Option 1: The Use of AI in Authorizing**

See real examples of authorizing related functions performed or facilitated by the use of AI. Try some tools and functions out for yourself. Discuss the option to form a continuing CCAP learning cohort on employing AI in authorizing!

- **Option 2: From Data to Dashboard: Excel Tips and Tricks for Fiscal Oversight & Creating Your Own Fiscal Dashboard**
Learn and try out some easy but powerful ways to make Excel much easier for your fiscal oversight, and learn how to create — and start work on creating — your own fiscal dashboard to make your life easier. Bring your computer!
- **Option 3: Creating Your Annual Reports on Your Authorized School(s)**
If you don't yet publish your own annual reports and could use a jump-start and a helping hand, this workshop is for you. Work with CCAP's customizable Annual Reports Toolkit, review options that will work best for you, get the work started, and come away with your plan — and perhaps some continued collaborators to see it through!
- **Option 4: Kick-off Meeting for the New CASI Authorizer Mentoring Program**
The Charter Authorizer Support Initiative (CASI) will be offering a new mentorship program to support those new to authorizing work. Attending this in-person kick-off meeting is not a requirement for participating in the program, but join the conversation to get things rolling! Get information, brainstorm ideas, and volunteer!
- **Option 5 (by invitation): Authorizer Attorneys Meeting**
CCAP continues its conference tradition of convening attorneys who represent authorizers to compare notes, identify current challenges, and — in a potentially momentous year in charter school law, both federal and state — attempt to look beyond the legal horizon. *If you are an authorizer attorney, for more information, please contact info@calauthorizers.org!*

2:30 PM – 3:15 PM: Afternoon Coffee & Dessert Break Available

Sponsored by [The Learning Collective](#)

4:00 PM – 5:00 PM: Reporting-out from Deeper Dives & Social Hour for Die-hards!