**Authorizer Portfolio Annual** **Performance Progress Report**

**[Academic Year]**

**[Authorizer Logo]**

**Board Of Education**

[Name, Position]

[Name, Position]

[Name, Position]

[Name, Position]

**District Administration**

[Name, Position]

[Name, Position]

**Prepared By**

[Name, Position]

Table of Contents

[AUTHORIZING OVERVIEW 3](#_Toc173493483)

[EXECUTIVE SUMMARY 3](#_Toc173493484)

[PERFORMANCE SNAPSHOT 6](#_Toc173493485)

[RATINGS 6](#_Toc173493486)

[CLOSING COMMENTS 10](#_Toc173493487)

[SCHOOL OVERVIEW 10](#_Toc173493488)

© 2024 by California Charter Authorizing Professionals is licensed under CC BY 4.0.

To view a copy of this license, [click here](https://creativecommons.org/licenses/by/4.0/?ref=chooser-v1).

# AUTHORIZING OVERVIEW

The administrative procedures used for charter authorizing and oversight align with the Board of Education’s Charter Policy and California Education Code. These procedures guide the work of the authorizing agency and oversight staff to provide charter school governing boards, administrators, and the public with a clear understanding of its authorizing and oversight practices. Authorizer oversight supports and promotes charter schools as integral partners in meeting the diverse educational needs and priorities of the students and families in the community.

The three phases of authorization—petition, oversight, and renewal—form a unified process. They coherently connect the petition for a new school, the review of the school’s performance during the life of its charter, and the renewal decision.

Determining whether a school is progressing toward renewal is a robust and collaborative process that begins with an annual review of legal updates. The oversight process does not include a yearly review of every legal requirement but a comprehensive check of many items, specifically focusing on continuous improvement in identified areas of concern. Regularly scheduled meetings with charter school officials provide a venue for discussing the oversight process, existing and new compliance requests, and expectations of evidence request submissions.

Charter school leaders and governing boards bear responsibility for ensuring full legal compliance of their Local Educational Agency, including but not limited to those items reviewed by the authorizer. The evidence-collection process aligns with annual school self-reflections on critical topics such as local assessment administration procedures, educational partner engagement, continuous improvement efforts, equity, access, and services provided to special populations.

The annual site visit focuses on information gathered throughout the oversight process. Further discussion and program observation can be used to validate claims made throughout the year. All supporting documentation is archived as part of a permanent record documenting progress toward renewal.

Annual charter oversight includes several key components:

* Attendance at charter school public meetings
* Desk audits, including a review of requested documents, a compliance review of the school’s website, and a compliance review of the Local Control and Accountability Plan (LCAP).
* Progress monitoring the school’s ability to fulfill the terms of its charter each year of the term
* Formal and informal site visits, including onsite review of documents containing sensitive and personally identifiable information (e.g., IEPs, safety plans).
* Assurances made by charter school officials that legal requirements have been met.

# EXECUTIVE SUMMARY

**Identified Strengths and Areas for Improvement by School**

This section of the *Annual Performance Report* provides an authorizing agency summary of identified strengths and areas for improvement based on indicators and metrics aligned with four guiding questions:

* Is the charter school’s education program a success?
* Is the charter school financially viable?
* Is the charter school operating and governed effectively?
* Is the charter school serving public policy purposes?

|  |
| --- |
| **Areas of Identified Strength** |
| **Education Program****Fiscal** **Governance****Operations****Public Policy** |
| **Areas Identified for Improvement** |
| **Education Program****Fiscal** **Governance****Operations****Public Policy** |
| **Authoring Agency Required Actions** |
| **Education Program****Fiscal** **Governance****Operations****Public Policy** |

# PERFORMANCE SNAPSHOT

Annual performance is based on, but not limited to, the following metrics aligned with the four guiding questions. Each school's *Annual Staff Oversight Report* explains the metrics further with detailed data and narrative explanations*.*

Snapshot data is provided for the current year and the school’s progression throughout the current term of the charter (e.g., a school may ‘be on track for renewal’ in the current year, but throughout the years in the current term of the charter leading up to the current year, the school may have been ‘progressing toward renewal.’

All aspects of the *Annual Performance Progress Report,* including the *Appendix: Staff Report,* align with four guiding questions:

* Is the charter school’s education program a success?
* Is the charter school financially viable?
* Is the charter school operating and governed effectively?
* Is the charter school serving public policy purposes?

# RATINGS

|  |  |  |
| --- | --- | --- |
| **On Track for Renewal** | **Substantially Progressing Toward Renewal****Action May Be Required** | **Not on Track for Renewal****Action Is Required** |

|  |  |  |
| --- | --- | --- |
|  | **GENERAL INFORMATION** | **ACADEMIC PROGRAM** |
| Charter Schools | Renewal Tier | On Track for Renewal  | Notice to Cure and Alleged Violation | Eligible for Tech Assist | CASSPP ELA Participation | CASSPP ELA Perform | CASSPP Math Participation | CASSPP Math Perform | College-Career Indicator | English Learner Progress |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |

|  |  |  |
| --- | --- | --- |
|  | **NON-ACADEMIC PROGRAM**  | **FINANCIAL HEALTH**  |
| Charter Schools | Chronic Absence | Graduation Rate | Suspension Rate | Post Secondary Metrics | Charter Goals/Metrics | Equitable Access | Student Protections | Short-Term  | SustainableFactors | Fiscal Controls |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |

|  |  |  |  |
| --- | --- | --- | --- |
|  | **OPERATIONS AND GOVERNANCE** | **ADVANCING EQUITY** | **DASS** |
| Charter Schools | Reporting/ Compliance | Governance | Health/ Safety | Personnel | Transparency  | Implements Approved Program | RecruitsDemographic Balance | Public Service | Alt Metrics or NA |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |
| [INSERT NAME] | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |

# CLOSING COMMENTS

|  |
| --- |
| **Authorizing Agency Closing Comments**  |
|  |

# SCHOOL OVERVIEW

|  |
| --- |
| **General Information** |
| **Grades Served** |  |
| **Total Enrollment/As of…** |  |
| **School Website** |  |
| **Leadership Team & Positions** |
|  |
| **Administrative Office Address & Phone** |
|  |
| **Additional Site Addresses & Phone Numbers, As Applicable** |
|  |
| **Board Members, Offices & Terms** |
|  |
| **School Mission** |
|  |
| **Brief School Description** |
|  |