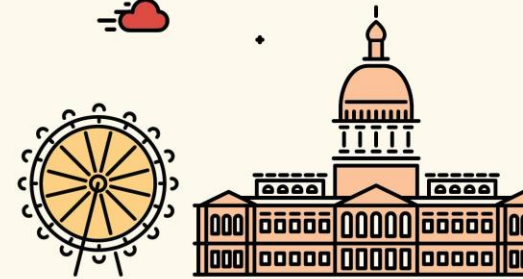


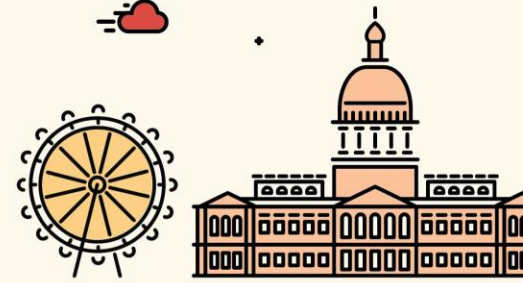


STAND TOGETHER TO FACE THE FUTURE



2016 NACSA LEADERSHIP CONFERENCE | ATLANTA, GA

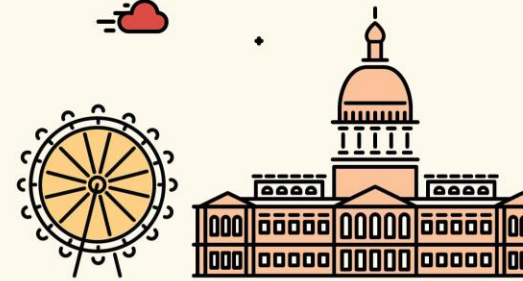
STANDING UP TO
SCRUTINY:
DESIGNING A
STRONG CHARTER
RENEWAL PROCESS



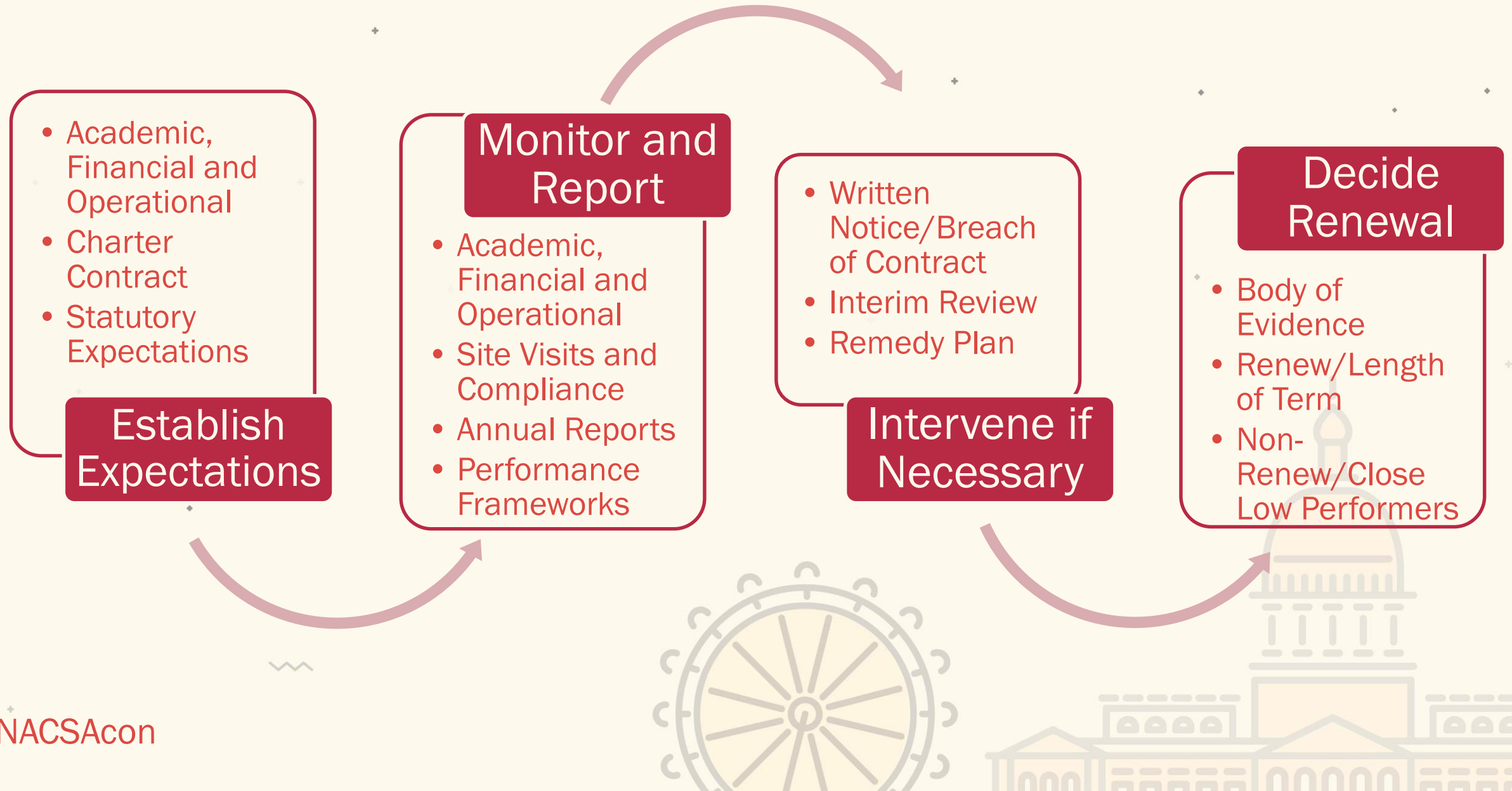
SESSION OBJECTIVE

Understand the key components of an effective renewal process

- Establish clear expectations
 - Monitor and report
- Intervene when necessary
- Present the body of evidence



Process for Renewal



Establish Expectations

- Academic, Financial and Operational
- Charter Contract
- Statutory Expectations

- Are academic, financial and operational expectations clearly laid out in the charter contract?
- What process for renewal is set by law or the charter contract?
- What is the scope of your authority in the renewal decision?
- Consider mid-term triggers in the contract to ensure progress towards expectations.

Tip: Educate and Inform before you Monitor and Evaluate

Monitor and Report

- Academic, Financial and Operational
- Site Visits and Compliance
- Annual Reports
- Performance Frameworks

- Continuous monitoring plus consistent reporting equals no surprises.
- How will you monitor the school's performance and how frequently?
- How will you collect the data? What resources will be required to get the data you need?

Tip: Align application, charter, site visit forms and renewals documents to speed internal processes.

Application Section A: Education Plan

A.1 Mission, Vision, and Educational Philosophy

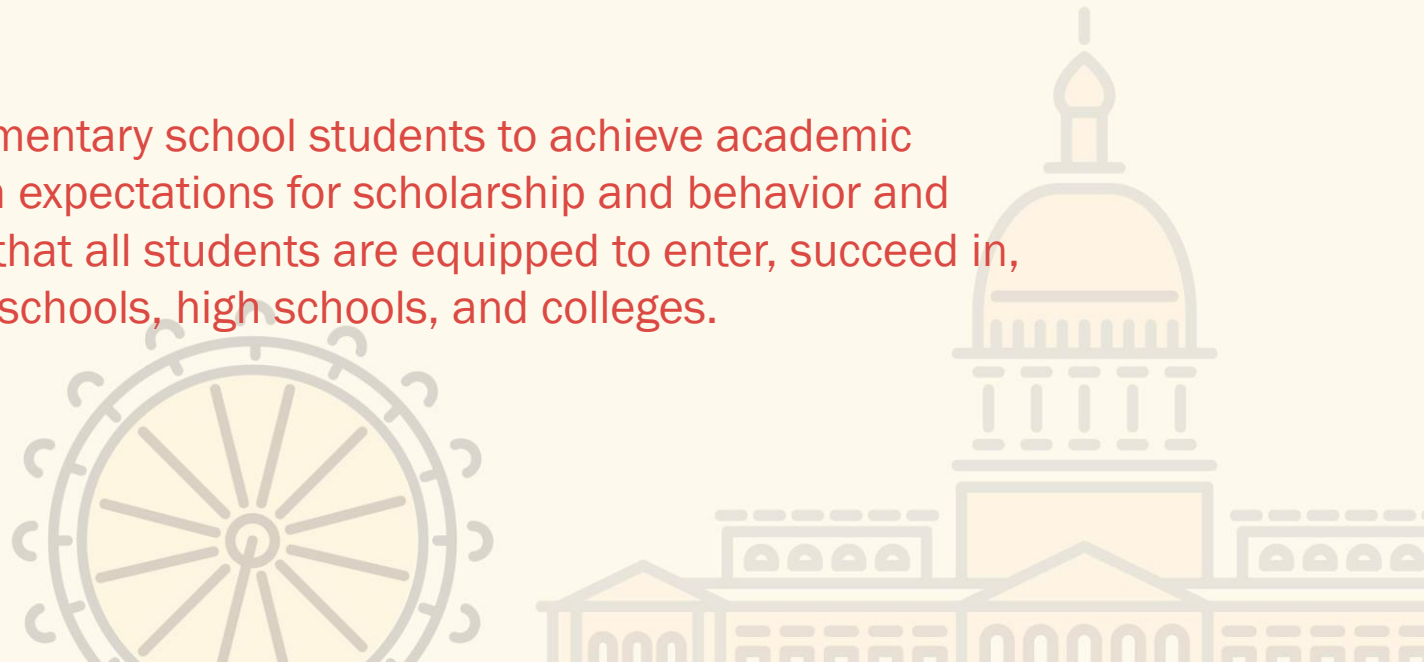
Applicant Instructions:

State the school's mission and briefly present your vision for how the school will operate. Describe the school's educational foundation and the culture or ethos. Include an overview of the instructional methods and any research or experience that indicates why you have chosen to use this approach with your anticipated student population.

CONTRACT EXHIBIT 1: EDUCATION PLAN

A.1 Mission

United Preparatory Academy (UPA) prepares elementary school students to achieve academic excellence and become citizens of integrity. High expectations for scholarship and behavior and an achievement-oriented school culture ensure that all students are equipped to enter, succeed in, and graduate from the most demanding middle schools, high schools, and colleges.



Site Visit Report: Education Plan

A.1 Mission

Contract

United Preparatory Academy (UPA) prepares elementary school students to achieve academic excellence and become citizens of integrity. High expectations for scholarship and behavior and an achievement-oriented school culture ensure all students are equipped to enter, succeed in, and graduate from the most demanding middle schools, high schools and colleges.

Fall visit: Yes. (Confirmed in classroom and general observations).

Spring visit: Yes. (Confirmed in classroom and general observations).

RENEWAL TEMPLATE SECTION 1: EDUCATION PLAN

A.1 Mission

Provide the mission statement of the school.



CMU Reauthorization Timeline – Five Year Contract

YEAR 1

ACADEMIC

- Promote schools' analysis and use of contractually required achievement and growth data
- Utilization of assessment data for improvement
- Educational Program Review (site visit, interviews, document review, report)
- Assessment monitoring
- Special education monitoring

GOVERNANCE

- New board member orientation
- Board meeting attendance
- Board policy development

FISCAL

- New business manager training
- Fiscal document reviews (budgets, quarterlies)

OPERATIONAL

- Staff review (Fall)
- Site/Facility review (Fall)
- Master Calendar of Reporting Requirements submission reviews

PERFORMANCE REPORTS

- Academic Performance Report (June)

YEAR 2

ACADEMIC

- Educational Program Review (site visit, interviews, document review, report)
- Assessment monitoring
- Special education monitoring

GOVERNANCE

- Conflict of Interest Disclosure Review
- Board nomination/recommendation/appointments
- New board member orientation
- Board meeting attendance
- Board policy updates, if necessary

FISCAL

- Fiscal document reviews (budgets, quarterlies)

OPERATIONAL

- Master Calendar of Reporting Requirements submission reviews

PERFORMANCE REPORTS

- Operational Performance Report (August)
- Fiscal Performance Report (February)
- Academic Performance Report (June)

YEAR 3 AND YEAR 4

Oversight activities for each year

ACADEMIC

- Educational Program Review follow-up (if necessary)
- Education Program and Curriculum Review development sessions
- Assessment monitoring
- Special education monitoring

GOVERNANCE

- Conflict of Interest Disclosure Review
- Board nomination/recommendation/appointments
- New board member orientation
- Board meeting attendance
- Board policy updates, if necessary

FISCAL

- Fiscal document reviews (budgets, quarterlies)

OPERATIONAL

- Master Calendar of Reporting Requirements submission reviews

PERFORMANCE REPORTS

- Operational Performance Report (August)
- Fiscal Performance Report (February)
- Academic Performance Report (June)

YEAR 5

ACADEMIC

- Educational Program Review follow-up (if necessary)
- Education Program and Curriculum Review development sessions
- Assessment monitoring
- Special education monitoring

GOVERNANCE

- Conflict of Interest Disclosure Review
- Board nomination/recommendation/appointments
- New board member orientation
- Board meeting attendance
- Board policy updates, if necessary

FISCAL

- Fiscal document reviews (budgets, quarterlies)

OPERATIONAL

- Staff review (Fall)
- Site/Facility review (Fall)
- Master Calendar of Reporting Requirements submission reviews

PERFORMANCE REPORTS

- Operational Performance Report (August)
- Fiscal Performance Report (February)
- Academic Performance Report (June)

REAUTHORIZATION ACTIVITIES

- Internal reauthorization discussion/review (October)
- Communicate with schools (October/November)
- Reauthorization contract submissions and review (December-February)
- Internal reauthorization review and recommendations sent to Board of Trustees (March)
- Board of Trustees action (April)
- Final reauthorization contract document review (April-June)
 - Terms and conditions
 - Amended bylaws
 - Fiscal Agent agreement
 - Oversight agreement
 - Position descriptions
 - Educational Service Provider agreement
 - Lease agreement
 - Education Goal
 - Educational Program
 - Curriculum
 - Methods of pupil assessment
 - Application and enrollment
- Contract signing (June)

Fordham Renewal Timeline – One, Three or Five Year Contract.

Activity*	Date
Online renewal application template opens	August 22
Internal analysis of performance v. accountability plan, any qualitative supplemental information, and draft renewal recommendation due to TBF leadership	September 14
Renewal application template submission due	September 16
Internal recommendations finalized and sent to TBF board	October 9
Application template evaluation completed	October 16
Renewal decisions made	October 21
Boards notified in writing of renewal decision	By November 1
Renewal contracts/charters drafted	December 2016 – May 2017

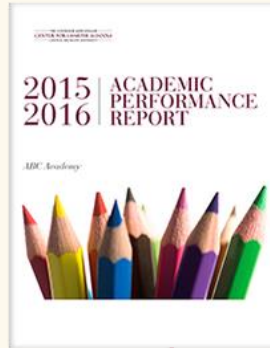
*Ongoing activities that inform renewal: *three site visits per year, monthly financial review, monthly board meeting attendance.*

ANNUAL REPORTING – REMEMBER YOUR AUDIENCE

- Are reports clear, consistent and easy to read?
- Are reports issued regularly?
- Are reports made available to the public?



CMU Performance Suite of Reports



Academic
Performance
Report

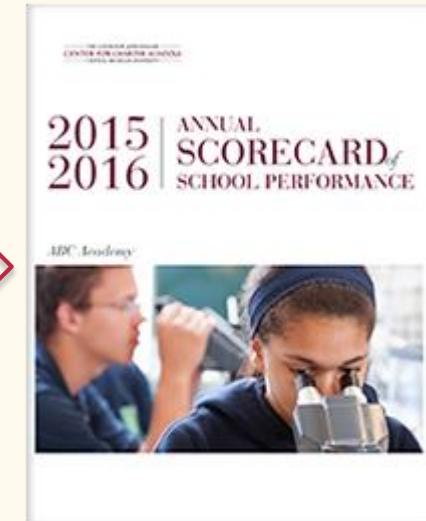


Operational
Performance
Report



Fiscal
Performance
Report

Scorecard



Intervene if Necessary

- Written Notice/Breach of Contract
- Interim Review
- Remedy Plan

- What if a school is not progressing towards achieving expectations?
- Discuss assessment of the school with the board early on.
- Reports alone will not carry the message.
- Develop a good relationship with the board so that they take action before you need to.
- Notice of breach, notice of intent to revoke, heightened review or scrutiny.

Decide Renewal

- Body of Evidence
- Renew/Length of Term
- Non-Renew/Close Low Performers

- Establish a timeline for making a decision
- Communicate in advance requirements to be considered for renewal and timelines.
- Plan how you will communicate the body of the evidence
- Account for the “court of public opinion.”
- Issuing varying renewal terms

KEEP IN TOUCH

Kathryn Mullen Upton

*Vice President for Sponsorship and
Dayton Initiatives, The Thomas B.
Fordham Foundation*



kmullenupton@edexcellence.net



937-227-3368

Barb Zeile

*Deputy Director for School
Performance, The Governor John
Engler Center for Charter Schools at
Central Michigan University*



bzeile@thecenterforcharters.org



517-364-9600

#NACSAcon

