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

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

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

Intervene if Necessary
- Written Notice/Breach of Contract
- Interim Review
- Remedy Plan

Decide Renewal
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
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).
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, quarterly)

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, quarterly)

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

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, quarterly)

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, quarterly)

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 document reviews (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
  - Amendments
  - Fiscal staff agreement
  - Oversight agreement
  - Previous descriptions
  - Educational Service Provider agreement
  - License agreement
  - Educator Cost
  - Educational Program
  - Curriculum
  - Methods of pupil assessment
  - Application and enrollment
  - Contract signing (June)
# Fordham Renewal Timeline – One, Three or Five Year Contract

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

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