The Charter School Application Process: Setting the Stage

COSA Winter Conference at Salishan

January 31, 2015

Recent developments in the world of charter schools

- Changes to ORS 338, new OAR (Division 26)
- Districts seeing first application, first renewal, first closure, etc.
- Will see charter school bills in 2015 session
- Work to pilot charter school performance framework that could be used by any district
- Work to develop and pilot an alternative accountability framework for charter schools serving students meeting certain criteria
- Increasing need for conferences, PD, support, and advocacy

Where do district get support?

- National Association of Charter School Authorizers (NACSA)
- ODE
- OSBA
- Other districts
- ….nowhere?

New charter authorizers' group under OACOA

- COSA agreed to house a charter authorizers' group under OACOA
- Steering committee is forming, has set purpose, mission, and is planning activities
- Met with legislative staff from COSA and OSBA

Mission: To promote excellence, effectiveness, and efficiency of charter school authorizers in Oregon in order to create and maintain high-quality charter schools through quality oversight and support.


Support strong authorizing practices
Build capacity for the work of authorizing
Goals of the authorizers' group under OACOA
Be a formalized resource for districts
Increase the presence, visibility, and voice of charter authorizers in Oregon

What can you expect?

Professional development

- Conferences
- Networking
- Presentations
- Seminars

Resources

- Model documents
- Statewide data
- Opportunities for involvement

Support

- Promising practices
- Legislative advocacy
- Network of support for questions and concerns

Possible conference session topics

- Charter schools 101 (the basics of application, renewal, ORS 338, annual evaluation, etc.)
- Charter schools 201 (more in-depth examinations of charter school authorizing practices: daily oversight, relationships, contracts, etc.)
- Performance frameworks (building and implementing)
- Alternative performance frameworks for school serving at-risk youth
- Legislative updates and forecasts
- Charter schools and special programs: ESL, SpEd, TAG, etc.
- Many, many more!

Interested in learning more?

Please fill out our survey!

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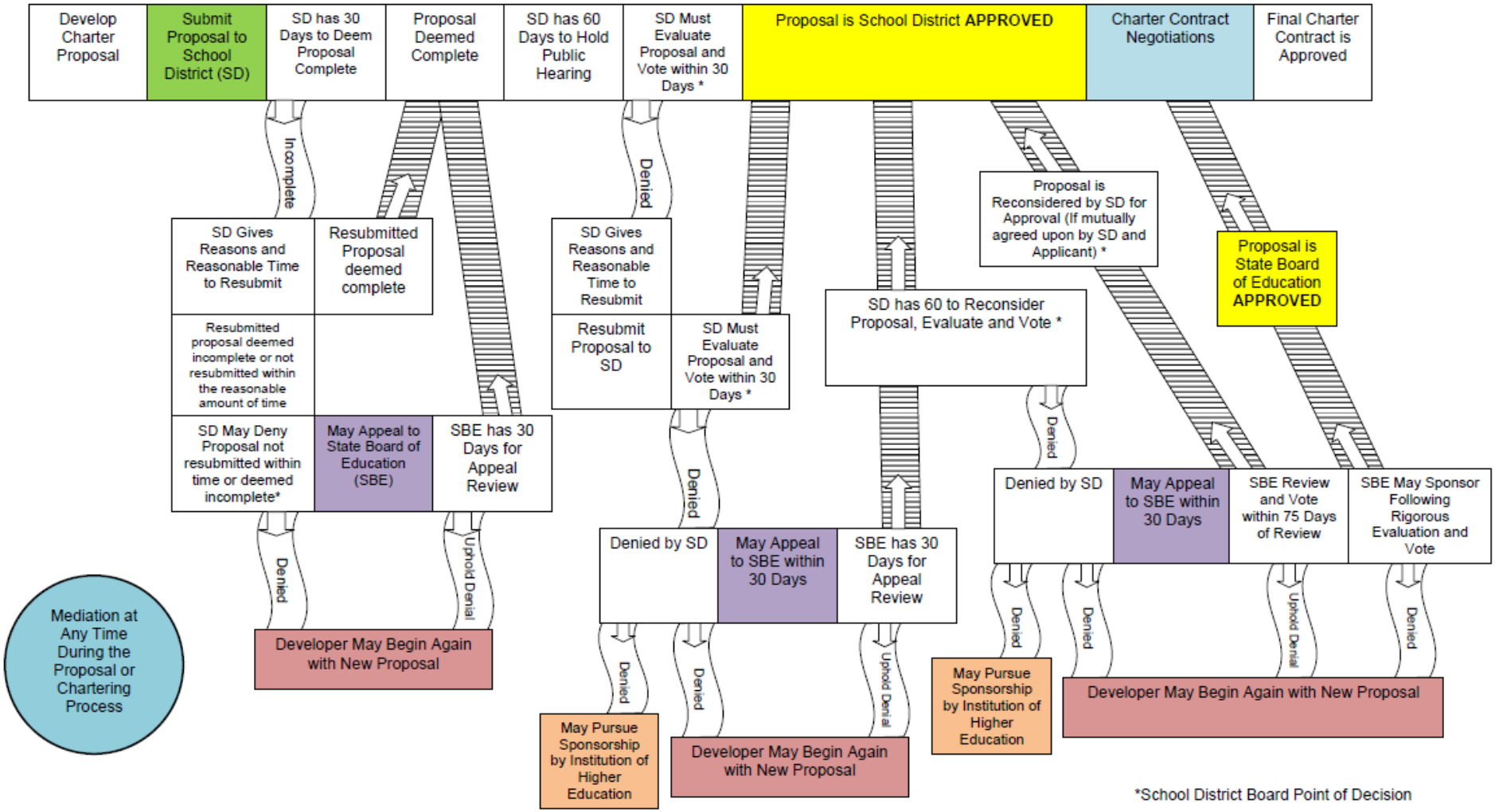
AGENDA

- Application Process Overview
  - Timelines
  - Appeals
  - Mediation
- PPS Application Process
- Oregon Charter School Authorizer Group
- National Association of Charter School Authorizers (NACSA)
- Q&A

Application Process



Components of a Quality Application

Academic

- Curriculum description and alignment with mission and state standards
- Evidence that the applicant can provide a comprehensive education to ALL students
- Understanding of services to special populations (SpEd, ELL, TAG)

Financial

- Demonstrated financial stability
- Sound financial management system
- Financially sound and reasonable budget
- Evidence that the applicant has the means, experience, and ability to ensure the charter school maintains financially stable

Organizational

- Sound governance structure and processes
- Policies and procedures
- Evidence that the governing body has a full understanding of the requirements and liabilities of a nonprofit board in Oregon
- Distinction between board duties and administrator duties

Don’t miss this!

The most important part of the charter school statute for districts is:

ORS 338.045(3)(a): In addition to the requirements of subsection (2) of this section, the school district board may require any additional information the board considers relevant to the formation or operation of a public charter school.

Components of a Quality Application Process

Application

- Published, transparent, clear, consistent
- Rigorous, yet reasonable
- Encompasses required components and other information relevant to the district
- Includes published rubrics for completeness and evaluation

Review

- Aligned with statutory criteria
- Diverse panel of experts
- Clear rubric with well-defined measures and scoring framework
- Follows statutory timelines as closely as possible; only amended by waiver if not possible.

Public hearing

- Full board or a committee of the board
- Sufficient time allotted
- Based on the most important issues raised in the review
- Board and applicant prepped to make the best use of time

Board decision

- Based on statutory criteria
- Supported by evidence from the hearing, public testimony, and review of the application
- Includes directives to staff regarding any major components of the application (location, school size, etc.)

The PPS process:

APPLICATION

Section 2: Demand for the Program

ORS 338.055(3)(a): The demonstrated, sustainable support for the public charter school by teachers, parents, students and other community members.

1. Not including individuals involved in the development of the charter school proposal, explain how educators, families, and community members demonstrated and continue to demonstrate sustainable levels of support for the proposed charter school.

2. Describe the manner in which community groups may be involved in the planning and development process of the public charter school.

3. Consider the following goal from the PPS Racial Educational Equity Policy:

   "The District shall welcome and empower families, including underrepresented families of color (including those whose first language may not be English) as essential partners in their student's education, school planning and District decision-making. The District shall create welcoming environments that reflect and support the racial and ethnic diversity of the student population and community. In addition, the District will include other partners who have demonstrated culturally-specific expertise -- including government agencies, non-profit organizations, businesses, and the community in general -- in meeting our educational outcomes."

   a. Describe how the charter school, acting in partnership with the District, would help meet this goal.

   b. Describe how the groups described in the goal support the development of the proposed charter school.

   c. Describe how the groups described in the goal above have been engaged in the development of this proposal to help mitigate negative impact on underrepresented families of color.

EXHIBIT III
POTENTIAL CHARTER SCHOOL STUDENTS ATTENDING PPS and OTHER SCHOOLS

NAME of PROPOSED CHARTER SCHOOL:

This exhibit is to determine the number (N) of the proposed charter school's potential students who currently attend Portland Public Schools, private schools, other districts, or who are homeschooled. **Enter each school name alphabetically in the appropriate columns. Enter the number (N) of potential charter school students currently attending each school. If a grade range does not apply, enter NA in the first school name cell and enter zero (0) in the N cell.** Add rows if necessary. Complete the last page. Use the data when appropriate to respond to a section of the charter application.

PPS Elementary or K-8 Schools	N	PPS Middle Schools	N	Other Districts: Public Elementaries, Middle Schools, or K-8s	N	Resident Districts of Home-Schooled Students in Grades K-8	N	Resident Districts of Privately Schooled Students in Grades K-8	N
TOTAL		TOTAL		TOTAL		TOTAL		TOTAL	

Other activities during the application process

- Set a date for letters of intent to apply AND for the application due date/deadline
- Initial meeting with applicant/orientation session for multiple applicants
- Make other information available: past applications, board and/or hearing minutes, etc.
- Availability for technical questions during the application development period

Don’t write the application for them!

What a technical question is….

- What does this term mean?
- What is this question asking?
- Do you need data to back up our answer on this?
- Would the district provide transportation for our students?
- How do monthly payments work?

…and what it’s not

- Can you look at our draft and give feedback before the submission date?
- Do you think our projection for SSF dollars is reasonable?
- What should we say about SpEd?
- What does the board want to hear about our curriculum?
- What area of town is best to reach our target population?

Completeness vs. substantive review

Completeness

- Have they answered every question?
- Is each answer minimally complete?
- From the answers given, can the merits be assessed in the review process?
- Small review team
- Don’t get into the weeds!

Substantive Review

- Evidence of ability to provide a comprehensive educational program to ALL students
- Evidence of financial stability, and the ability to be financially viable in the long and short term
- Evidence of organizational stability and strong leadership
- Proposed program supports the mission of the school
- Evidence of support from the community
- Large review team with diverse expertise

The PPS process

- Letter of intent due by May 1
- Application due ON July 15
- Team of 3 readers for completeness, determined by majority vote
- Team of 8-9 readers for substantive review

The PPS process:

REVIEW

Section 3: Financial and Organizational Plans

(Place a C in the space next to each question to indicate completeness. Place an I to indicate incompleteness. Make notes next to each incomplete question to indicate why it is incomplete.)

1. Describes the governance structure of the public charter school.
2. Explains how the board was established and how it supports the school's mission, governance, racial and cultural equity, community outreach efforts and fiscal stability.
3. Describes the plan to train and recruit board members.
4. Explains how the directors' roles are different from the school administrators' roles.
5. Describes any advisory or other board committees and how they will relate to the school's board and administration.
6. Describes the manner in which the program review and fiscal audit will be conducted.
7. Describes the plan for performance bonding or insuring the public charter school, including buildings and liabilities.
8. Completed Exhibit VII: Pre-Operational and Operational Budget.
9. Completed Exhibit VIII: Financial Plan, including the following components:
    a. Describes the financial management systems for the charter school.
    b. Includes a plan for having the financial management systems in place at the time the school begins operating.
    c. Provides evidence that the systems and procedures in the proposed financial and business plan follow general accounting procedures.
    d. Provides evidence that the proposed budget and financial plan for the public charter school are financially sound.
10. Completed Exhibit IX: Board of Directors for the Proposed Charter School.
11. Completed Exhibit X: Bylaws for the Proposed Charter School.
12. Completed Exhibit XI: 501(c)(3) Status

Section 7: Value vs. Adverse Impact

- **4 = Exceeds**: The application addresses the section criteria with responses that adequately demonstrate the applicant's ability to successfully start and operate a charter school. Applicant demonstrates a clear understanding of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules, PPS Board policy regarding charter schools, and current PPS strategic initiatives in school system design. Very little additional information or data is necessary.
- **3 = Meets**: The application addresses the section criteria with responses that adequately demonstrate the applicant's ability to successfully start and operate a charter school, although additional information or data may be necessary.
- **2 = Nearly Meets**: The application sufficiently addresses most of the section criteria, but does not provide adequate detail in the responses. Applicant provides some relevant data and/or information, but key data or informational points may be missing or flawed.
- **1 = Does Not Meet**: The application does not address the section criteria in adequate detail and/or the responses demonstrate the applicant's inability to successfully start and operate a charter school. The applicant provides insufficient data and/or information to support assertions in the proposal, or uses flawed or misleading data and/or information. The applicant demonstrates a lack of knowledge of the requirements of charter schools, as per relevant Oregon Revised Statutes and Oregon Administrative Rules.

Narrative Questions	1	2	3	4	Comments
1. Explains why a public charter school was selected as the desired educational option for the grade levels and target population(s). Compares and contrasts the charter school option to other options already available in the district.	☐	☐	☐	☐	
2. Describes the proposed plan for the placement of public charter school teachers, other school employees and students of the public charter school upon termination or nonrenewal of the charter.	☐	☐	☐	☐	
3. Describes how and where enrollment trends of district schools may be affected if the proposed charter school opens	☐	☐	☐	☐	
Subtotal: (maximum points awarded = **12**)					
SECTION TOTAL: **(maximum possible = 12)**					

The PPS process

Completeness

- Team of 3 reviewers
- Each reads independently
- Determination by majority rule
- Applicant is given specific feedback on incomplete items

Substantive Review

- Team of 8-9 reviewers
- Each reads independently
- Group meets to discuss and calibrate
- Review report informs the hearing
- Applicant is given the report, which contains specific feedback
- Review is NOT a recommendation

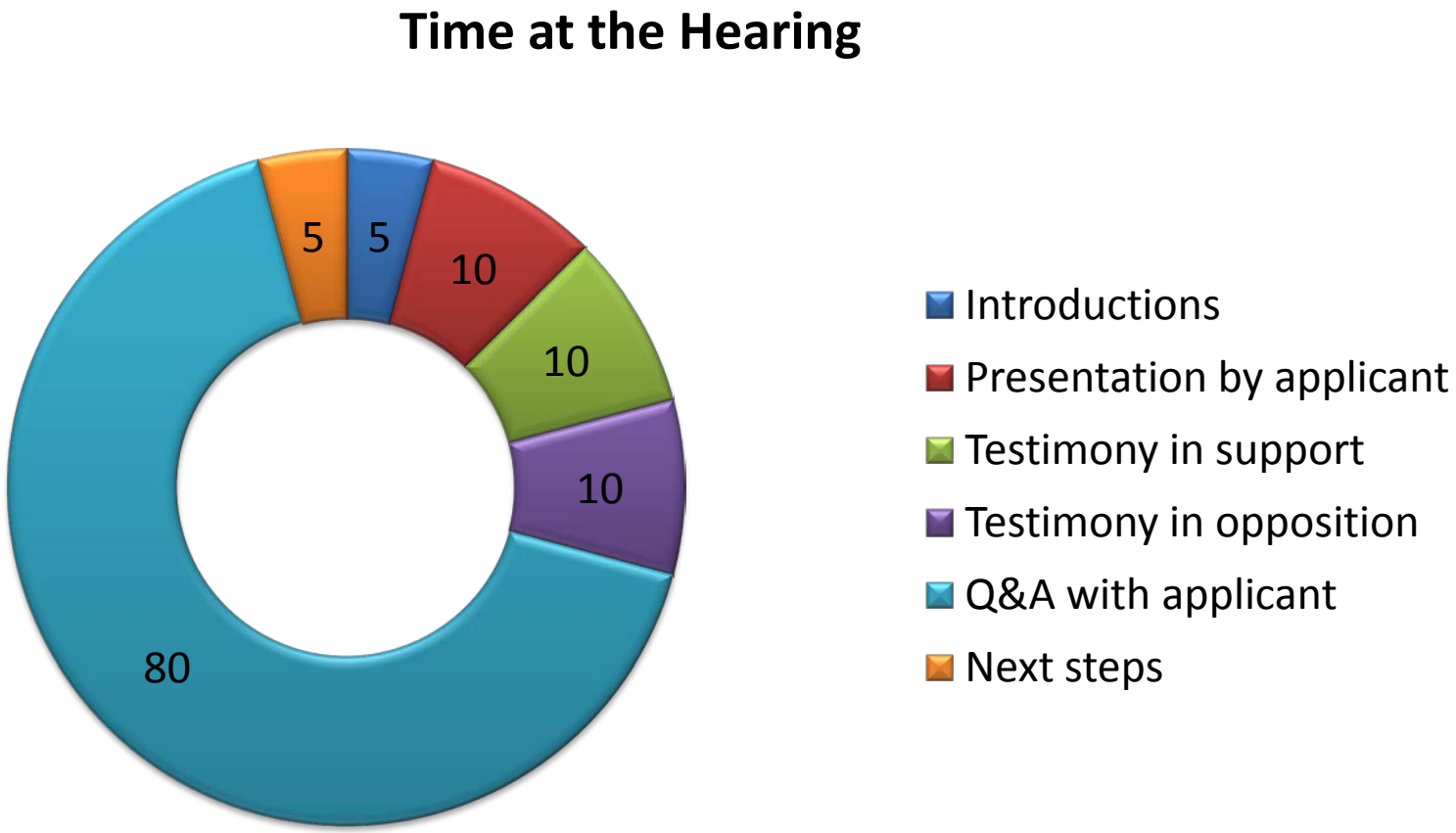
The PPS process:

HEARING

The PPS process

- Board Committee on Charter Schools holds hearing
- Hearing questions generated by team review
- Hearing questions provided to Board Committee and applicant several days in advance
- Any questions not covered in hearing are asked for in writing a week after the hearing

The PPS process



The PPS process:

BOARD DECISION

The PPS process

- Any questions not addressed at the hearing are requested in writing.
- Review rubric is updated with information from the hearing and any other information requested/received.
- Review rubric forwarded to Superintendent, who makes a recommendation to approve or deny.
- Meeting with Board Committee on Charter Schools to review staff report and Superintendent's recommendation.
- Board subcommittee leads discussion of application at Board work session. Full Board receives Superintendent's recommendation, which is aligned with statutory criteria.
- At next full Board meeting following the work session, Board votes to approve or deny. If approved, Board resolution addresses major components to be included (or not) in contract.

Join the Oregon Charter School Authorizer Group

- Under the OACOA branch of COSA
- Purpose:
  - To support strong authorizing practices, as authorizers directly contribute to the quality of charter schools.
  - To help build capacity at districts for the work of authorizing, and for the development and implementation of strong authorizing practices.
  - To be a formalized resource for districts, including those that don't yet have charter schools.
  - To increase the presence, visibility, and voice of charter school authorizers, and to offer promising practices, training, data, networking, resources, and various models for evaluation and accountability.
- Mission: To promote the excellence, effectiveness, and efficiency of charter school authorizers in Oregon in order to create and maintain high-quality charter schools through quality oversight and support.
- Activities: Professional development, resources, legislative advocacy, networking, presentations, conferences

Contacts and Resources

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National Association of Charter School Authorizers (NACSA)

Introduction to NACSA

Beth Seling

COSA Conference

January 30, 2015

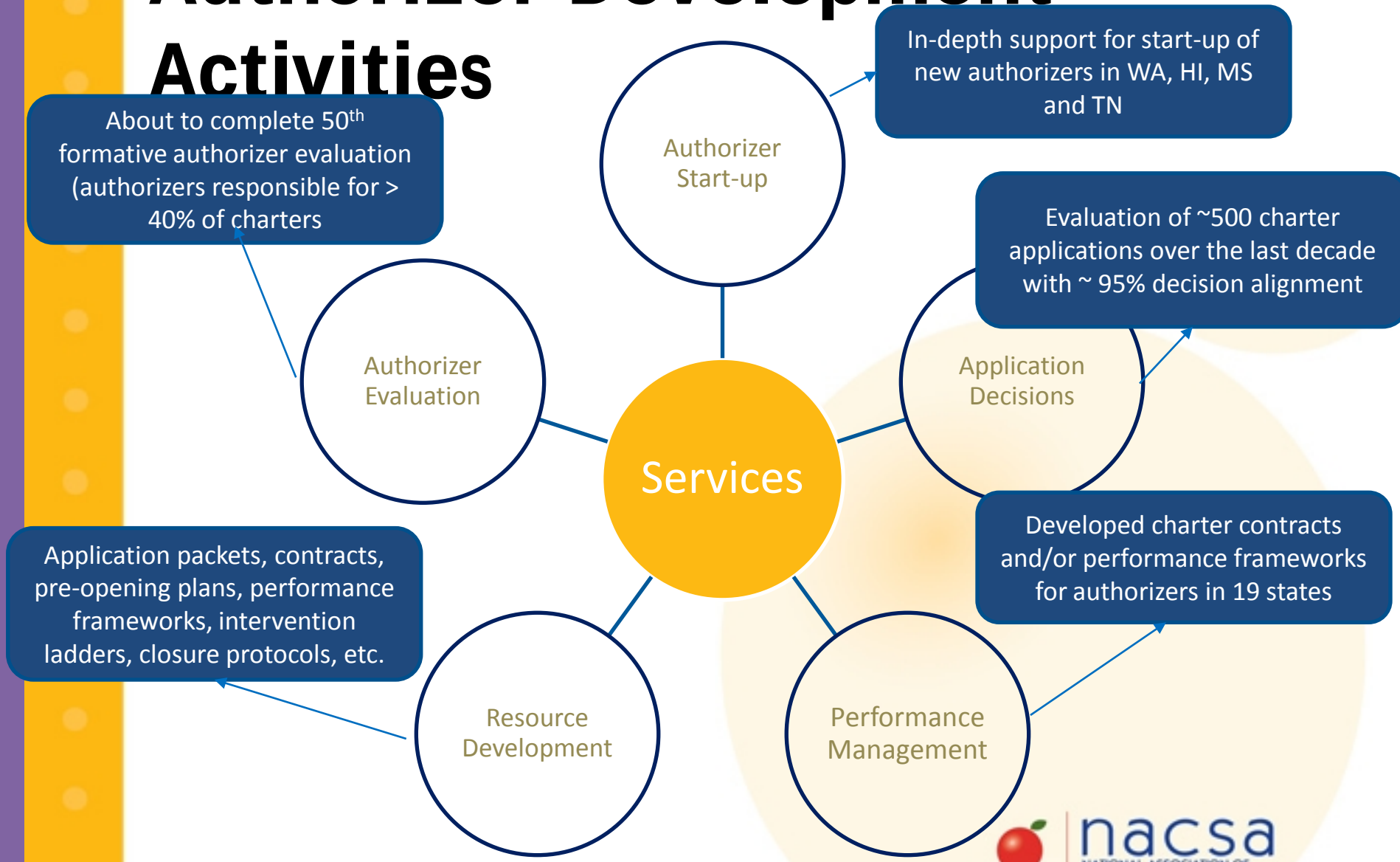
nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

- **Mission:** To achieve the establishment and operation of quality charter schools through responsible oversight in the public interest

- Not-for-profit, membership association

- **NACSA Authorizer Development:** We help authorizers make decisions that will fulfill a vision of high quality charter school options for children and families.

Authorizer Development Activities



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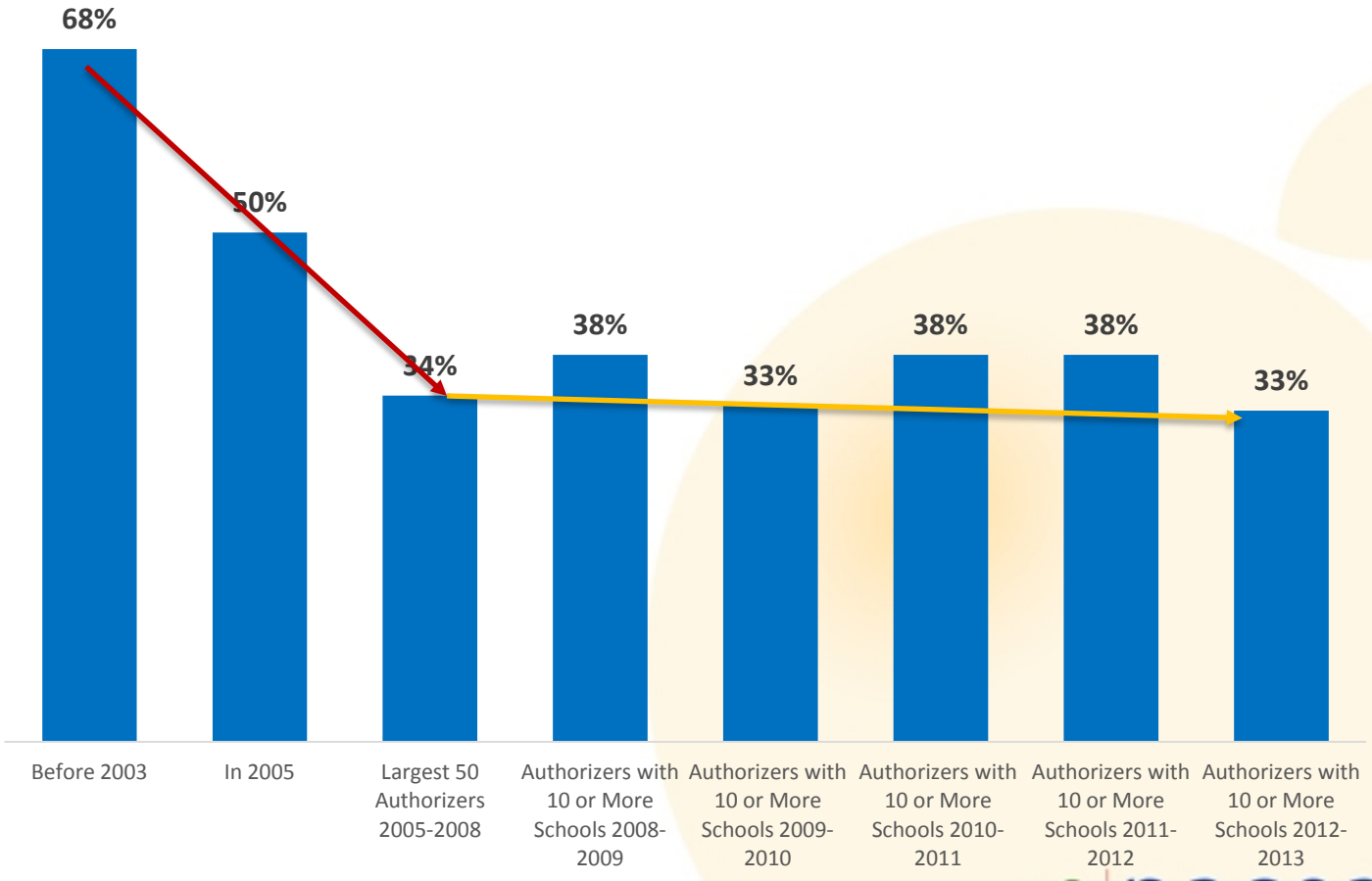
Trends in application approval rates



nacsa
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS

Board responsibilities

- Publish RFP and evaluation criteria
- Approve high quality proposals that meet all published evaluation criteria
- Deny weak or inadequate proposals

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Elements of a strong process

- Clear application and guidance**
- Rigorous evaluation criteria**
- Due diligence (experienced operators)
- Expert evaluators
- Applicant interview
- Written recommendation
- Transparency

*** NACSA model template*

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Questions and Discussion