• Who is in the room?

• Why did you come to this session?
In this session you will learn...

- Who’s NACSA?
- What is an authorizer’s role?
- What’s the plan for developing an Oregon model application?
- What do a quality application process and application look like?
About NACSA

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

• Not-for-profit, non-partisan membership association since 2000

• Authorizer Development: application process management, strategic planning and training, models and templates, authorizer evaluation
WHAT IS AN AUTHORIZER’S ROLE?
The Charter Bargain

School Autonomy

School Accountability

Improved Student Outcomes
The Authorizing Process

The purpose is to improve the educational options available to children and families by...

- Approving only strong, demonstrably viable applications
- Renewing schools only if they meet or exceed performance expectations
WHAT’S THE PLAN FOR DEVELOPING AN OREGON MODEL APPLICATION?
Why have a model application?

A quality authorizer implements a comprehensive application process that:

- includes **clear** application questions and guidance;
- follows **fair, transparent** procedures and rigorous criteria; and
- grants charters only to applicants who demonstrate a strong capacity to establish and operate a quality charter school.
Oregon Model Application Development Process

- Start with the NACSA Core and Crosswalk with Oregon Law
- Receive Feedback from OR Practitioners (COSA Conference, webinar)
- Draft OR-Specific Application Materials
- Receive More Feedback from Oregon Practitioners (OSBA Convention)
- Revise and Finalize
WHAT DOES A QUALITY APPLICATION PROCESS LOOK LIKE?
Process Steps

- Administrative Review (completeness)
- Assemble Evaluation Team
- Paper Review
- **Due Diligence (experienced operators)**
- Consensus Call
- **Interview**
- Written Recommendation
- Decision
Evaluation Teams

• Perspectives
  – National reviewers
  – Local reviewers

• Substantive experience/expertise
  – Educational program development and implementation
  – Organizational plan and implementation
  – Financial/business plan
  – Local context

• Team Size: 4-5 per team
Special Applicant Types

• Virtual/Distance Charter Schools
• Existing Operators
• Conversion Schools
Evaluation Basics

Evidence

• Application including attachments
• Due diligence (If applicable)
• Interview

Characteristics of a high-quality school plan

• Internally aligned
  – Cohesion of elements
  – Mission/vision connected
• Externally valid
  – Evidence based
  – Demonstrated track record
• Sufficient detail
# Rating Categories

<table>
<thead>
<tr>
<th>Rating</th>
<th>Characteristics</th>
</tr>
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<tbody>
<tr>
<td><strong>Meets/Exceeds the Standard</strong></td>
<td>The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant’s capacity to carry out the plan effectively.</td>
</tr>
<tr>
<td><strong>Partially Meets the Standard</strong></td>
<td>The response meets the criteria in many respects, but lacks detail and/or requires additional information in one or more areas.</td>
</tr>
<tr>
<td><strong>Does Not Meet the Standard</strong></td>
<td>The response is wholly undeveloped or significantly incomplete; demonstrates lack of preparation; is unsuited to the mission of the authorizer or otherwise raises substantial concerns about the viability of the plan or the applicant’s ability to carry it out.</td>
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WHAT DOES A QUALITY APPLICATION LOOK LIKE?
Key Sections of the Model Application

School Overview
  - ORS 338.045.2.a,b,c,g,h,u
1. Educational Program Design & Capacity
  - ORS 338.045.2.d,e,l,l,o,p,r,s,t
2. Operations Plan & Capacity
  - ORS 338.045.2.f,i,j,k,q,v,w,y
3. Financial Plan & Management Capacity
  - ORS 338.045.2.m,n,x
4. CMO/Network Replication (if applicable)
School Overview
ORS 338.045.2.a,b,c,g,h,u

- Mission and Vision
- Educational Need and Anticipated Student Population
- Education Plan/School Design
- Community Engagement
- Leadership and Governance
- Enrollment Summary
Educational Program Design & Capacity
ORS 338.045.2.d,e,i,l,o,p,r,s,t

- Program Overview
- Curriculum and Instructional Design
- Pupil Performance Standards
- High School Graduation Requirements
- School Calendar and Schedule
- School Culture
- Supplemental Programming
- Special Populations and At-risk students
- Student Recruitment and Enrollment
- Student Discipline
- Parent and Community Involvement
- Educational Program Capacity
Educational Program and Capacity: Critical Questions

- Are choices for curriculum and instruction supported by evidence?
- Who will be responsible for developing and executing the educational plan?
- Are goals and expectations ambitious but realistic?
- Does the applicant have sound plans for serving students with special needs?
- Are the education plan priorities and needs accounted for adequately in the budget?
- Does the team have a strong track record and sufficient expertise to implement the educational program?
Operations Plan & Capacity
ORS 338.045.2.f,i,j,k,q,v,w,y

• Governance
  – Legal Status and Governing Documents
  – Organization Charters
  – Governing Board
  – Advisory Bodies
  – Grievance Process

• Staffing
  – Staff Structure
  – Staffing Plans, Hiring, Management, and Evaluation
  – Professional Development
  – Performance Management

• Facilities
• Start-Up and Ongoing Operations
  – Start-Up Plan
  – Transportation
  – Student Safety
  – Insurance

• Operations Capacity
Operations Plan and Capacity: Critical Questions

• Has the team appropriately planned for all components of non-academic operations?
• Are anticipated operations costs reflected appropriately in the budget?
• Does the applicant have a reasonable and thorough start-up plan?
• Does the team have experience with non-academic operations?
• Does Board composition include experience and expertise necessary to ensure success and sustainability?
Financial Plan & Capacity
ORS 338.045.2.m,n,x

• Financial Plan
  – Plans for Financial Management
  – Plans for Annual Audit
  – Start-Up Budget/Cash Flow
  – Five-Year Budget/Workbook
  – Budget Narrative

• Financial Management Capacity
Financial Plan and Capacity: Critical Questions

• Does the budget accurately reflect the available funding sources?
• Does the budget include all the major cost centers associated with the operation of a charter school?
• Does the budget reflect going market rates (e.g., salaries, contracted or inter-organizational services and fees, facilities)?
• Does the budget include all expenses outlined throughout the proposal?
• Does the team have experience to meet fundraising goals?
• Does the team have the capacity to manage the finances to ensure financial sustainability and good stewardship of public resources?
Evaluating ESPs/Networks/Existing Operators

- Track record
- Capacity (especially locally)
- Rationale for growth
- Financial viability
- Independence of governing board
- Management contract
- Rationale for changes to school model
- Plans to serve different student populations
HOW DO YOU GET TO A DECISION?
Consensus Calls

- Evidence-based discussion of the application sections
- Grounded in the rubric criteria
- Sometimes used to determine whether an applicant will advance to interview round/determine areas for further clarification
Capacity Interview

• In-person interview with the applicant
• Opportunity to follow-up on particular sections of the application
• Assess capacity of founding team to implement the proposed plan
Final Recommendation

• Evaluation Criteria Ratings
• Capacity Interview
• Due Diligence

Board Decision
Discussion

ODE: http://www.ode.state.or.us/search/results/?id=124

NACSA: www.qualitycharters.org