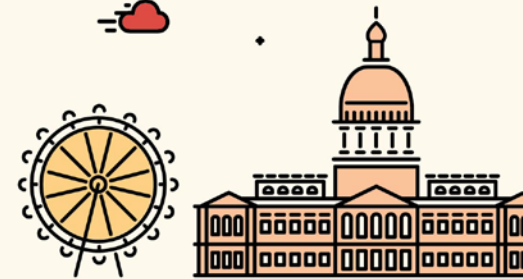
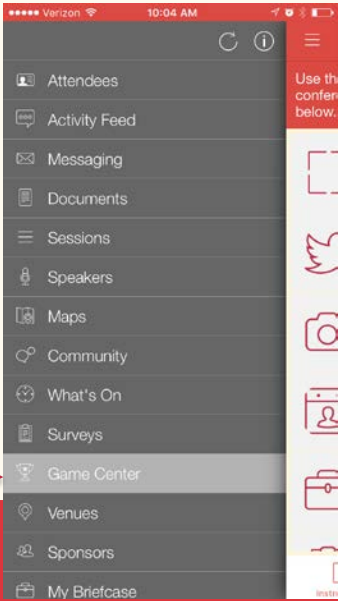




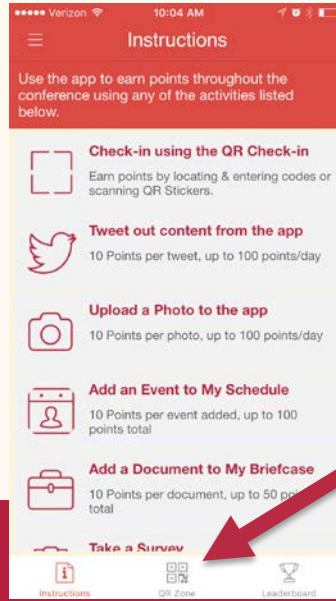
STAND TOGETHER TO FACE THE FUTURE



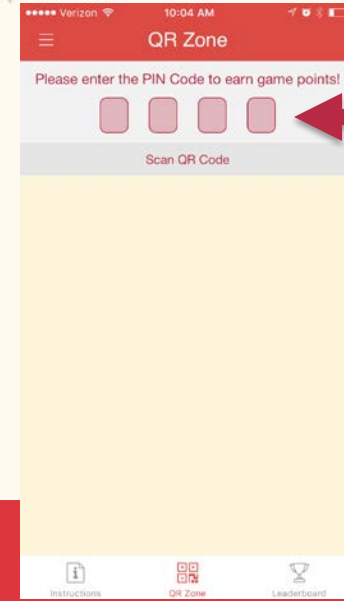
2016 NACSA LEADERSHIP CONFERENCE | ATLANTA, GA



**GO TO THE
GAME CENTER**



**CLICK "QR
ZONE"**



**ENTER YOUR
SESSION'S PIN**

**SESSION NAME: Quality Out of the Gate: Critical
Thinking About Your Application Process**

**LET YOUR
PRESENTERS
KNOW YOU'RE
HERE, AND EARN
POINTS!**

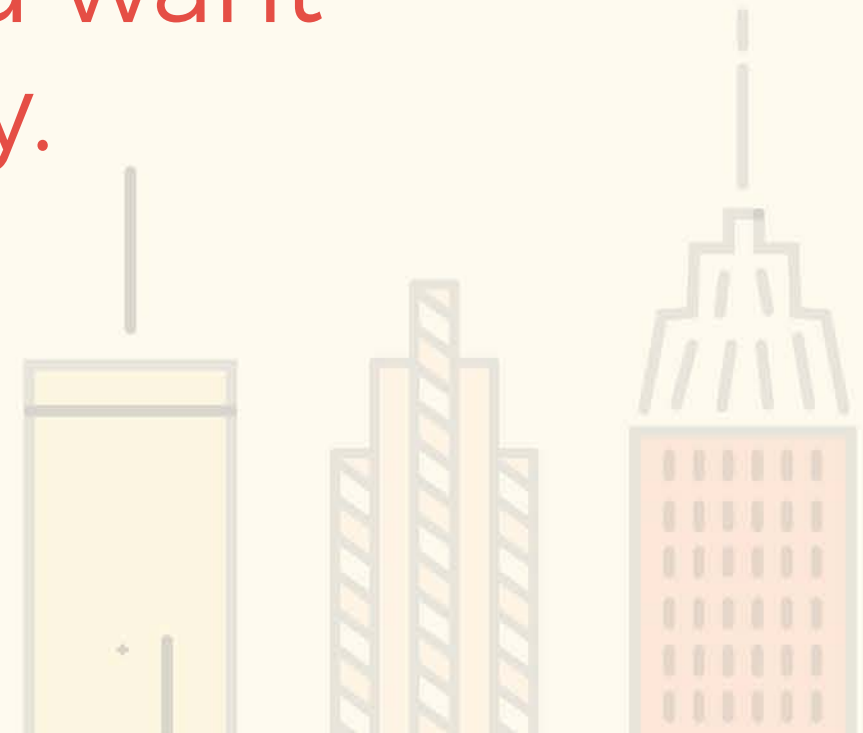
SESSION PIN:

7740

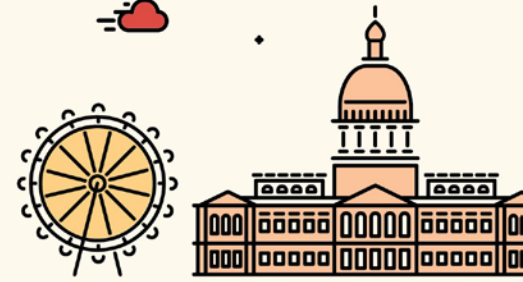
#NASSACON

DO NOW:

Write down one question about applications that you want answered today.



QUALITY OUT OF THE GATE: CRITICAL THINKING ABOUT YOUR APPLICATION PROCESS



**Christopher
Dewitt**

- Denver Public Schools

**Morgan
Felts**

- State Charter Schools Commission
of Georgia

Erin Reddy

- National Association of Charter
School Authorizers

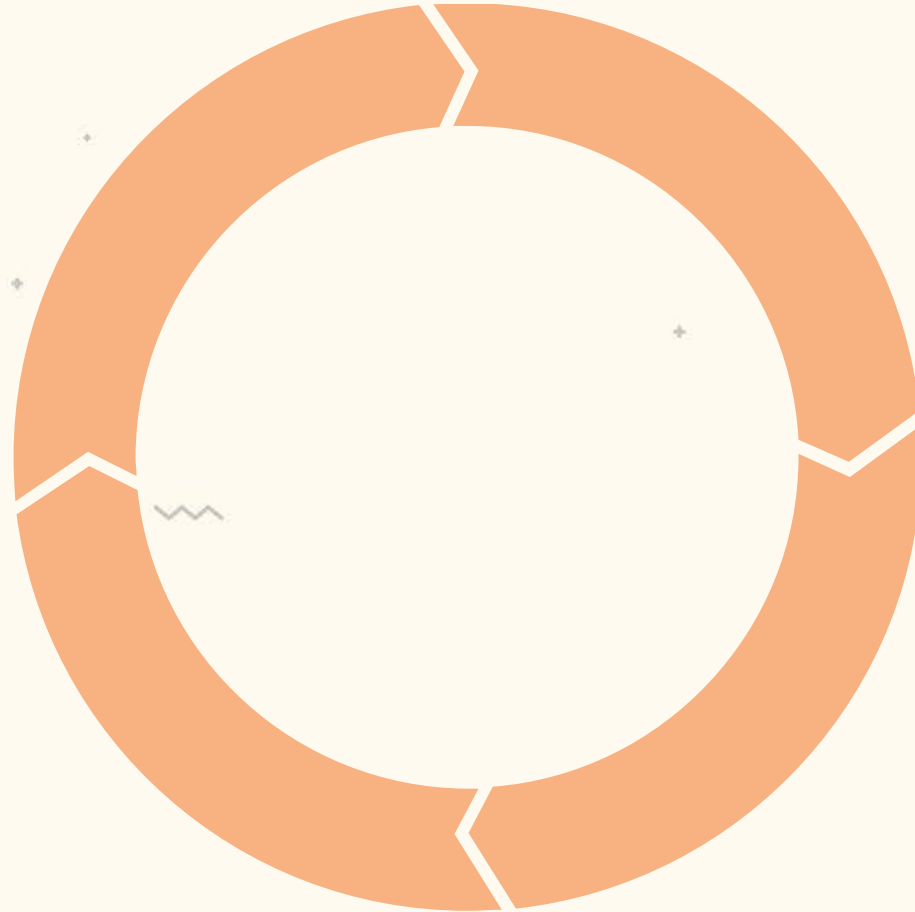
A HEALTHY APPLICATION PROCESS

**MERIT-BASED
APPLICATION
DECISIONS**

**EFFICIENT
APPLICATION
SUBMISSION**

**COMPREHENSIVE
APPLICANT
INTERVIEWS**

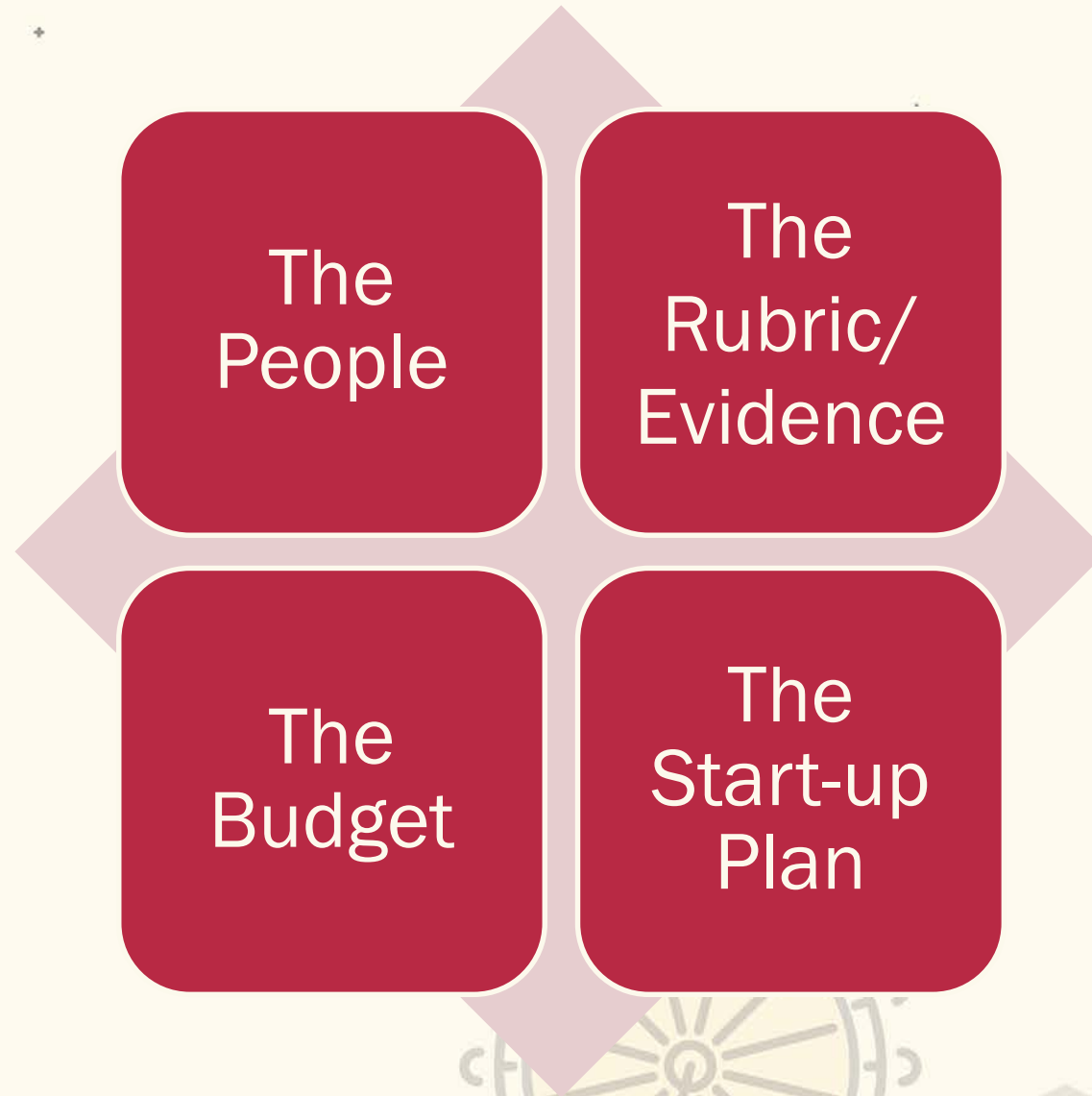
**RIGOROUS
APPLICATION
EVALUATION**



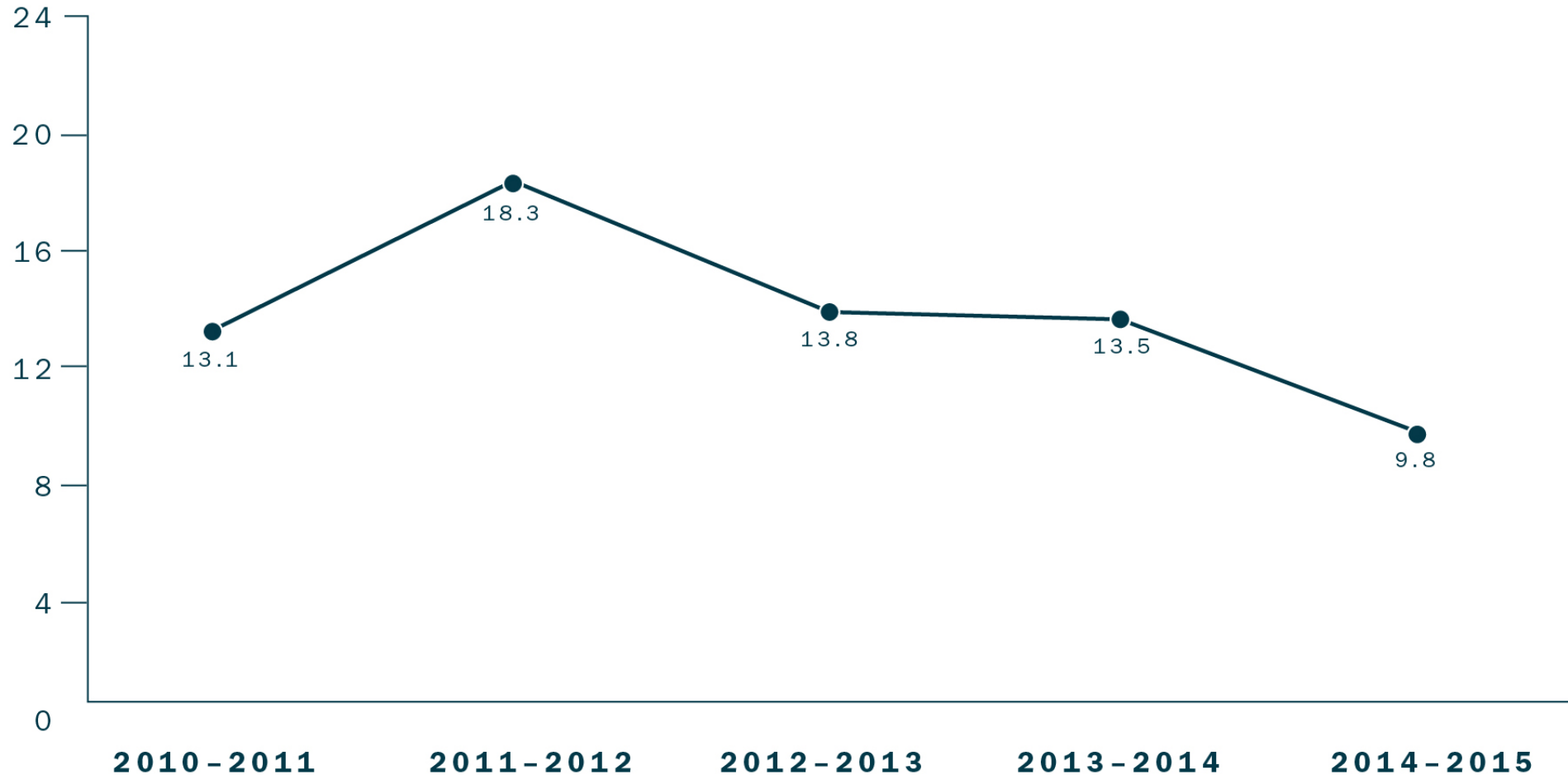
The term **'triage'**
normally means
deciding what gets
attention first.



APPLICATION TRIAGE: WHERE TO TAKE A PULSE

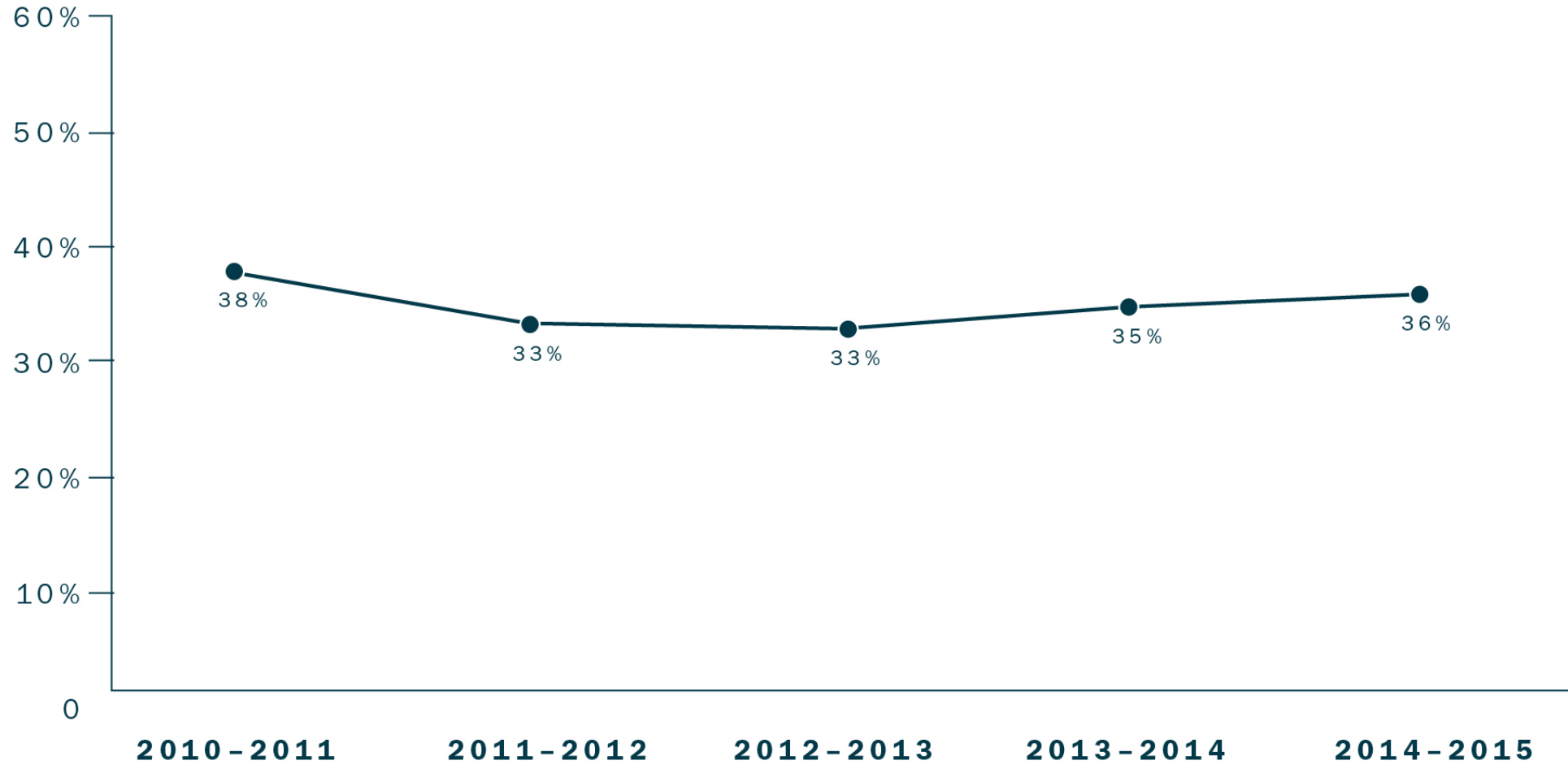


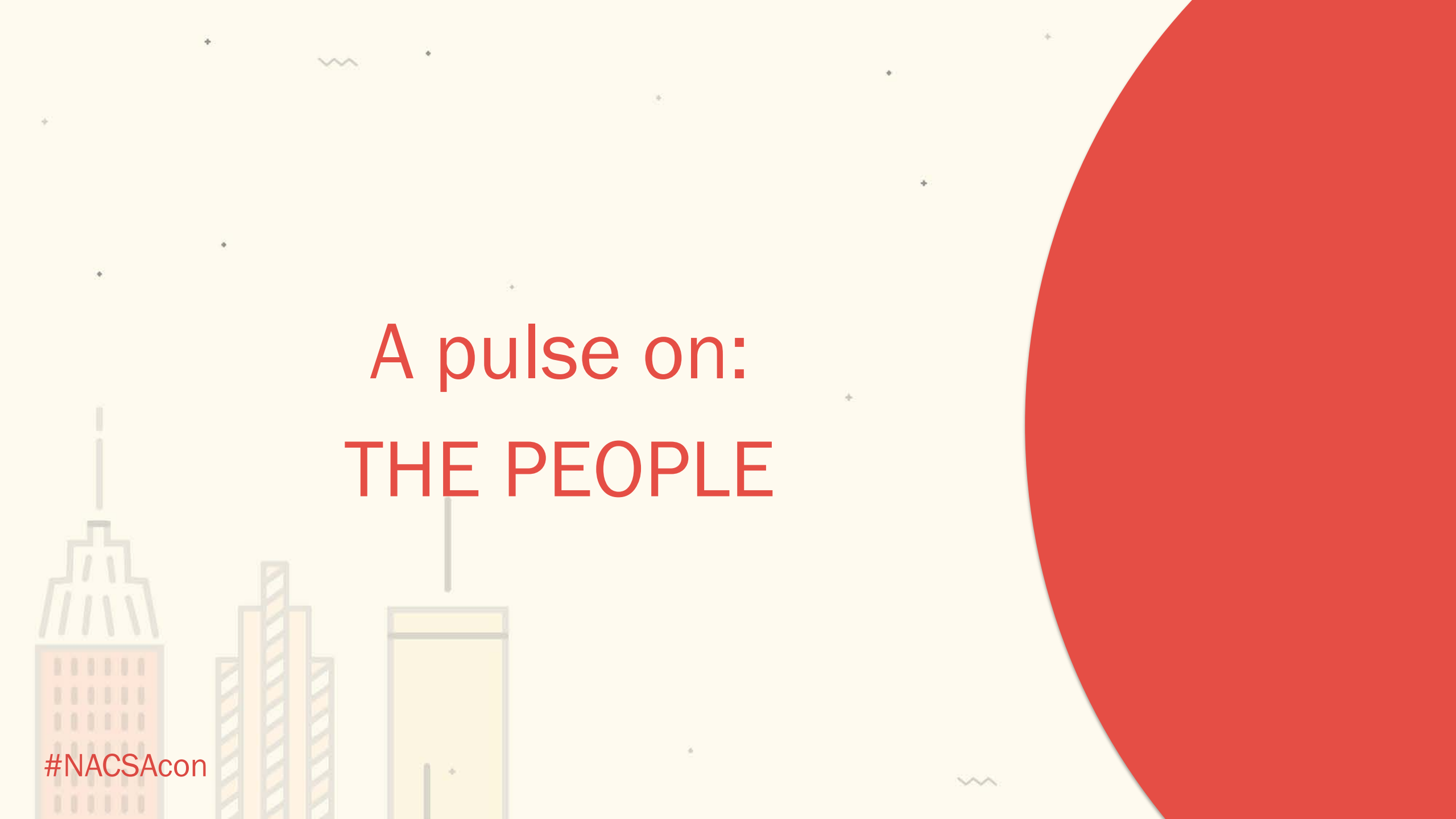
AVG. NUMBER OF APPLICATIONS RECEIVED PER LARGE AUTHORIZER 2011-2015



APPLICATION APPROVAL RATE

2011-2015



A stylized city skyline is depicted at the bottom of the slide. On the left, a tall building with a tiered top is shown in light red and grey. To its right are several other buildings of varying heights and colors, including orange and yellow. A large, solid red circle on the right side of the slide represents a sun or moon. The background is white with scattered small grey dots and wavy lines, suggesting a sky or a digital space.

A pulse on: THE PEOPLE

#NACSAcon

EXTERNAL
REVIEWERS

People

APPLICANTS

Review team composition

Capacity interviews

#NACSAcon

WHY ARE EXTERNAL REVIEWERS IMPORTANT?



“A quality authorizer engages, for both written application reviews and applicant interviews, highly competent team members with internal and external evaluators with relevant educational, organizational (governance and management), financial, and legal expertise, as well as a thorough understanding of the essential principles of charter school autonomy and accountability.”

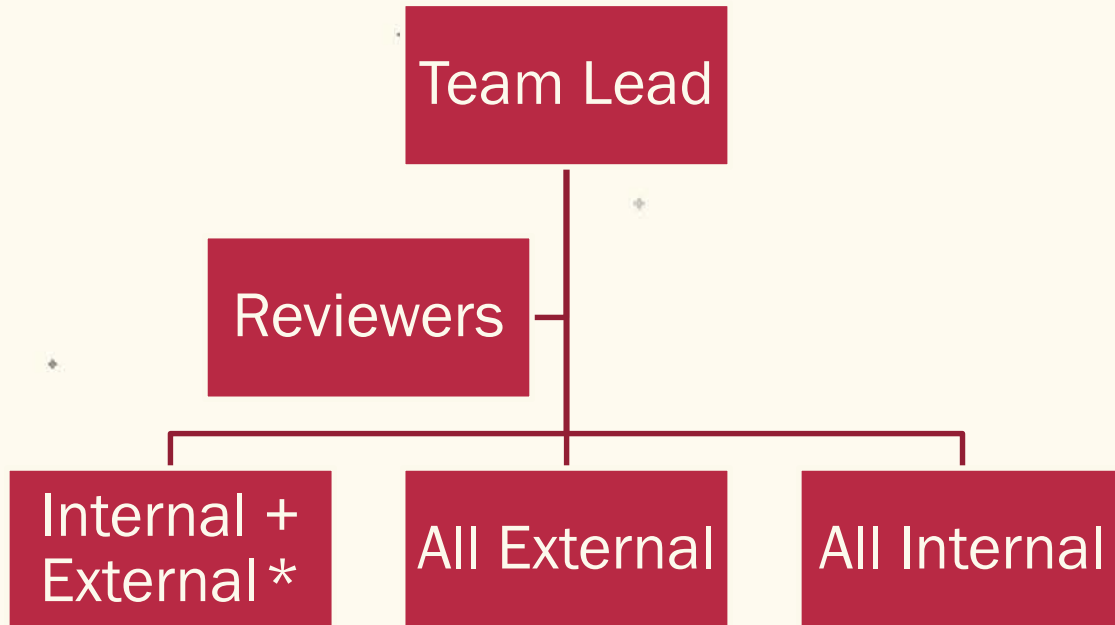
EXPECTATIONS OF REVIEWERS



#NACSAcon



HOW TO COMPOSE THE TEAM



Develop a process!

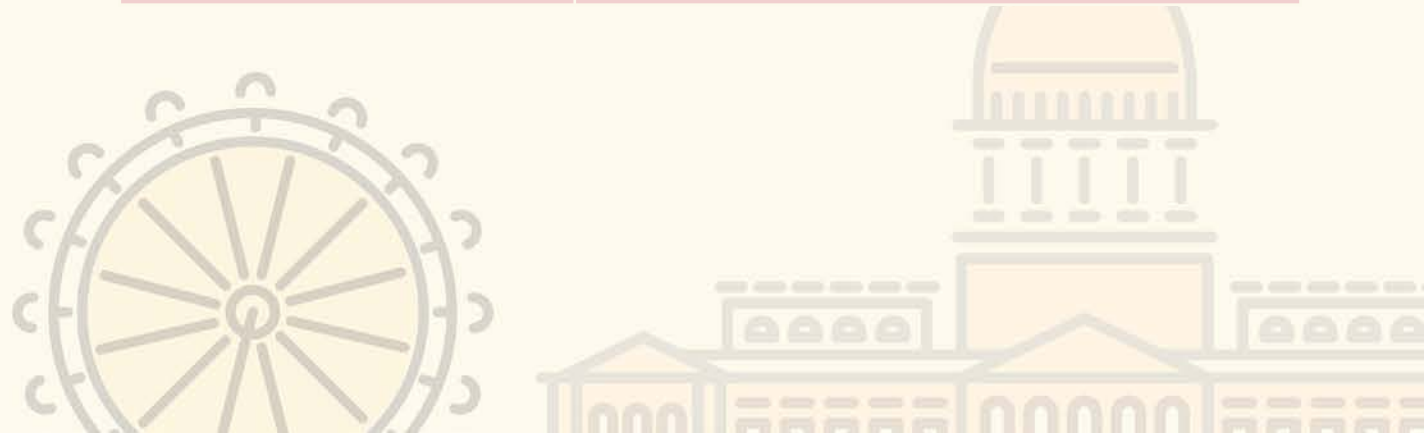
- Recruitment plan
- Teams of 4
- Required qualifications
- Selection process

* Represents a NACSA best practice

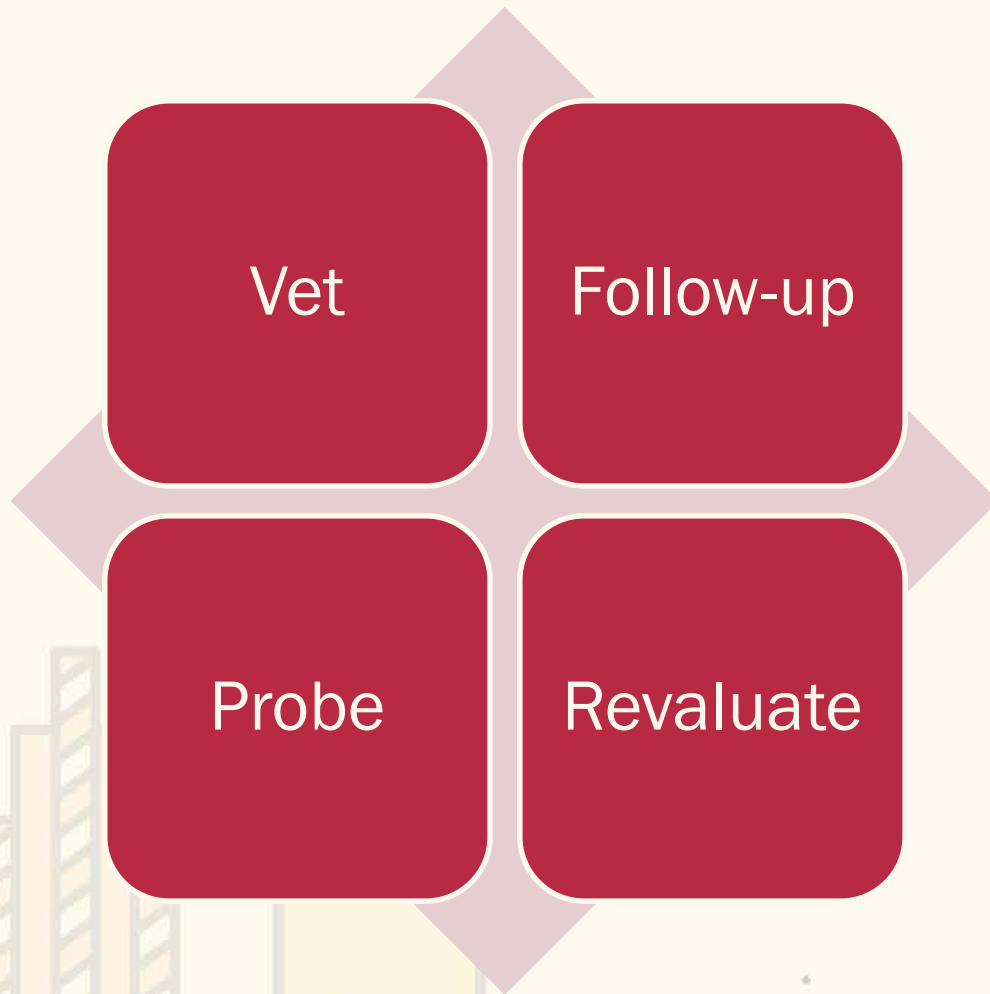
WHAT TO LOOK FOR IN REVIEWERS

- ✓ Professional experience
- ✓ Eye for detail
- ✓ Strong writing skills (*for team leads*)
- ✓ No conflict of interest
- ✓ Interpersonal skills
- ✓ Sensitivity to perspective

| Areas of Expertise | Specific Models |
|--|---|
| Curriculum Instruction Management Law Finance Business Special Education | Blended/Virtual Dropout Recovery/Alternative STEM/STEAM Expeditionary Learning |



WHY IS THE CAPACITY INTERVIEW IMPORTANT?



“A quality authorizer rigorously evaluates an application through... substantive in-person interview with the applicant group.”

THE HOW: CAPACITY INTERVIEW PROCESS

DEVELOP
STANDARD
QUESTIONS FOR
EACH APPLICANT

DEVELOP
APPLICANT-
SPECIFIC
QUESTIONS

BE MINDFUL OF
EQUITY AND
POTENTIAL FOR
BIAS

LOGISTICS

- Length of Interview
 - Interviewers
 - Interviewees
- Inform reviewers

CAPACITY INTERVIEW: KEY TAKEAWAYS

- ✓ Capacity interviews offer an additional data point to ensure your applicants will execute their plan well
- ✓ Capacity interviews should include both Board members as well as school leaders to get a clear sense of the founding team
- ✓ Be clear on the logistics and expectations for your interviews up front



CAPACITY INTERVIEW: KEY TAKEAWAYS

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- ✓ Capacity interviews should include both Board members as well as school leaders to get a clear sense of the founding team
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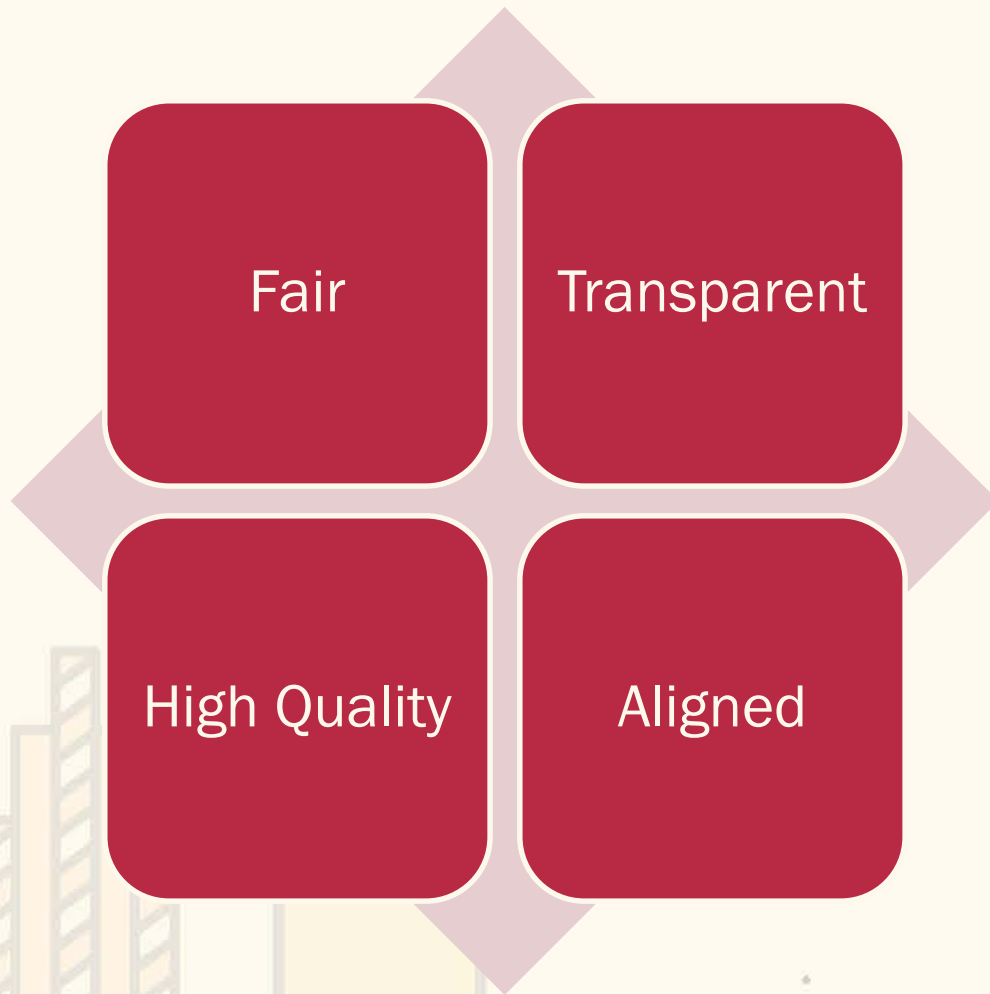


A stylized city skyline is visible on the left side of the slide, featuring several buildings in shades of orange and yellow. A large, solid red circle, representing a sun or moon, is positioned on the right side. The background is white with scattered small black dots and wavy lines, suggesting a night sky or a clean, modern aesthetic.

A pulse on: THE RUBRIC

#NACSAcon

WHY IS A COMPREHENSIVE EVALUATION RUBRIC IMPORTANT?



“A quality authorizer implements a comprehensive application process that...follows fair, transparent procedure and rigorous criteria.”

FIVE AREAS OF FOCUS

CULTURE

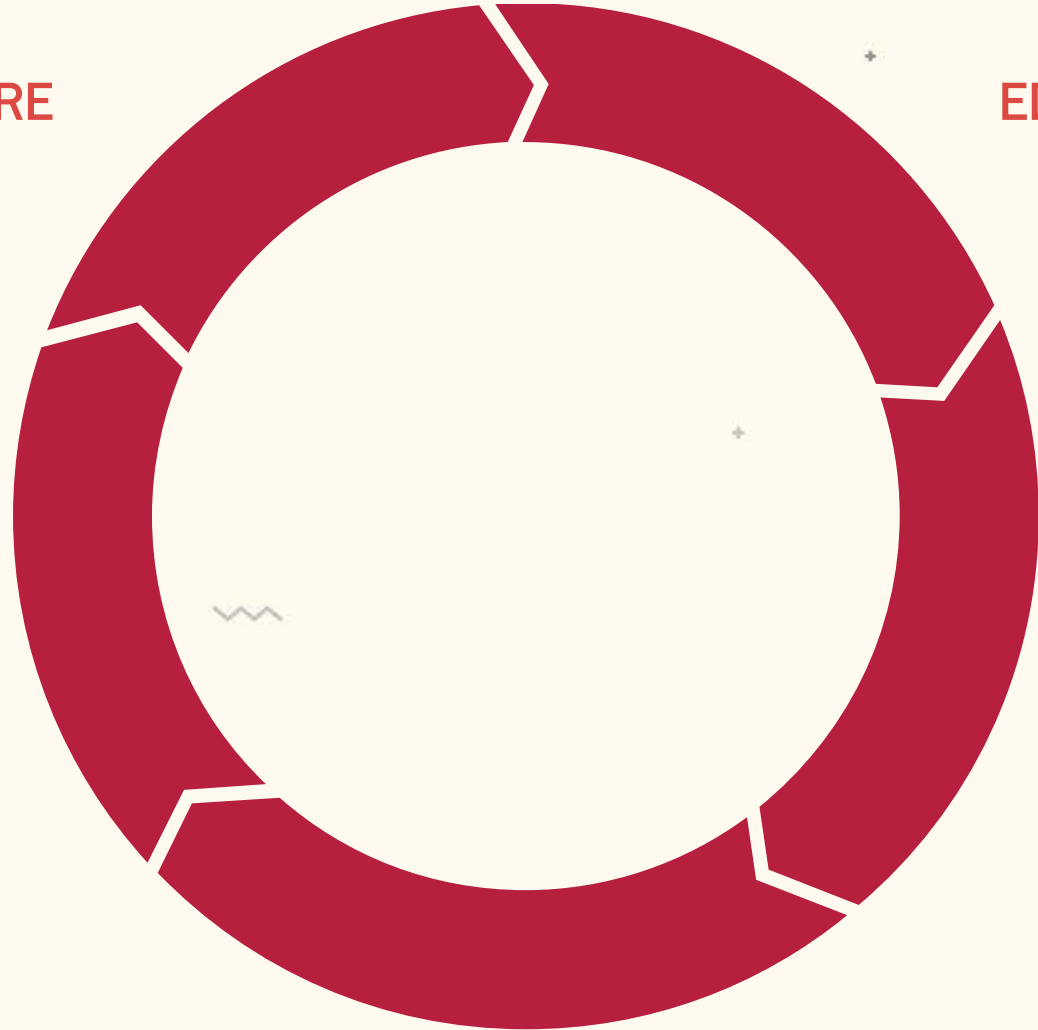
EDUCATION PROGRAM

GOVERNANCE

TEACHING

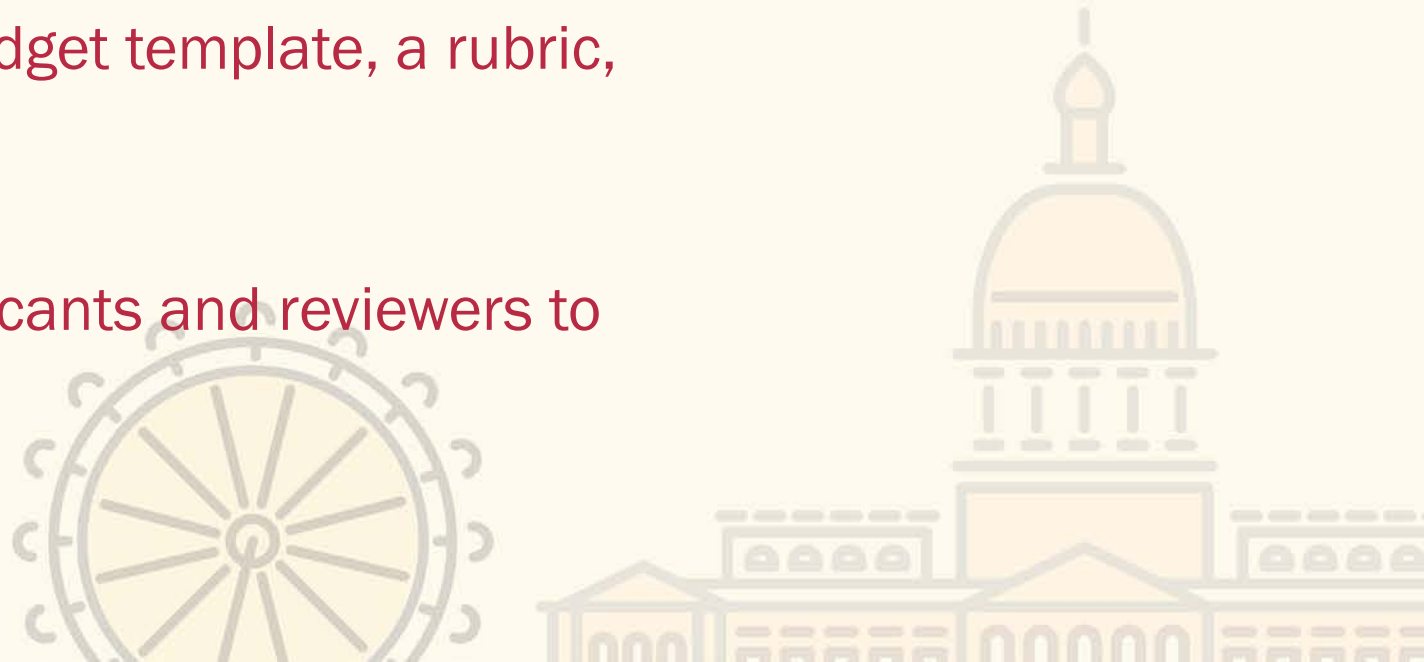
LEADERSHIP

#NACSAcon



THE HOW: LOGISTICS

- Applicants are given all application materials months before the application is due
 - This cycle, applications are due in April and materials were published in October
- Applicants material include a budget template, a rubric, and guiding questions
- We run workshops for both applicants and reviewers to familiarize them with the rubric



RUBRIC: TAKEAWAYS

- Rubrics offer a transparent and equitable standard of quality that all applicants can follow
- Rubrics reduce the likelihood that bias will affect the outcome of your process
- Rubric criteria should be aligned with accountability systems used once the school is up and running.

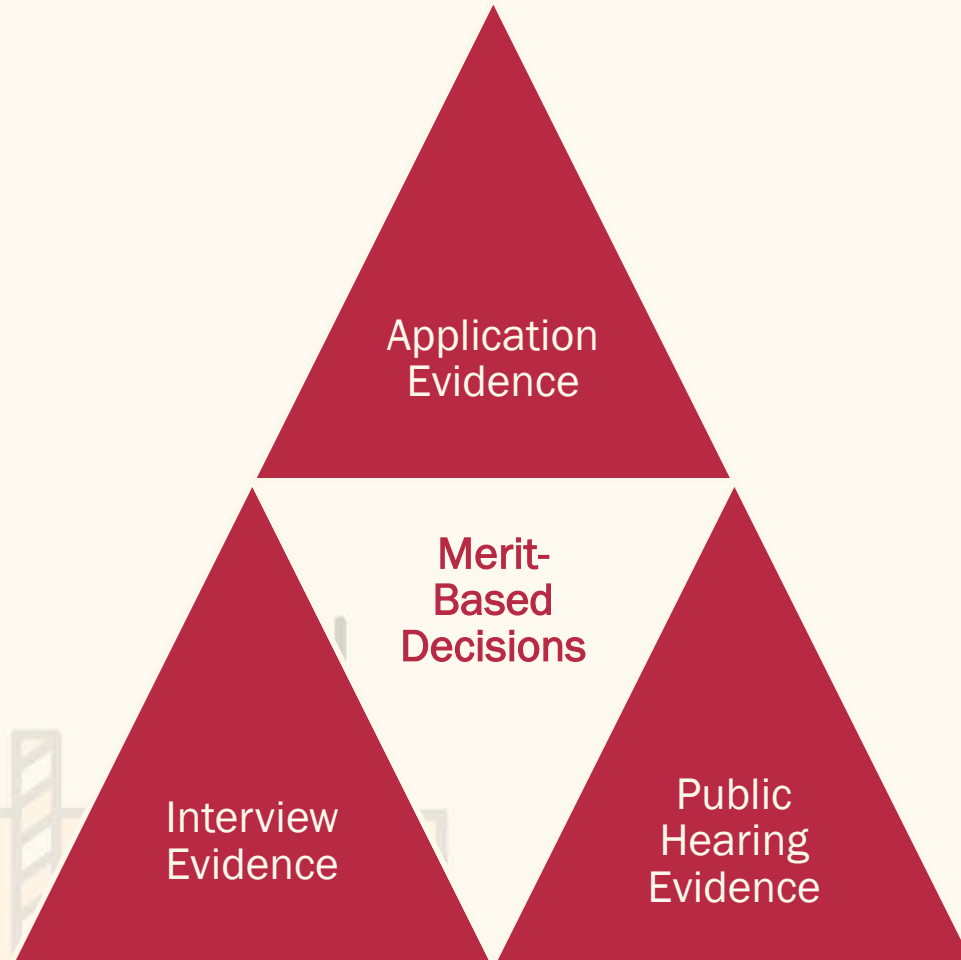


A stylized city skyline is visible in the bottom left corner, featuring several buildings in shades of orange and yellow. A large, solid red circle, representing a sun or moon, is positioned on the right side of the image. The background is white with scattered small grey dots and wavy lines, suggesting a sky or a digital space.

A pulse on: THE EVIDENCE

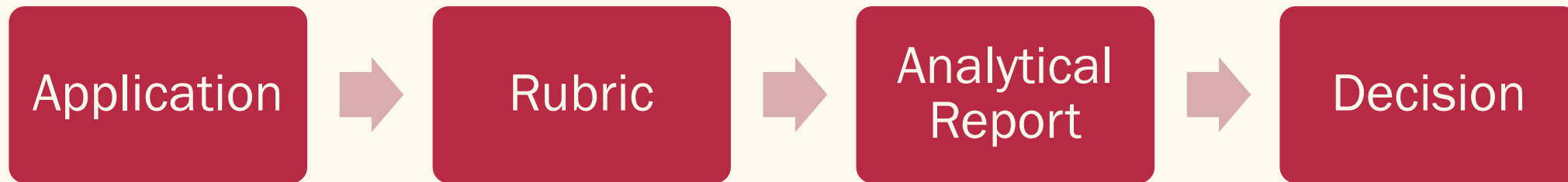
#NACSAcon

WHY IS QUALITY EVIDENCE IMPORTANT?

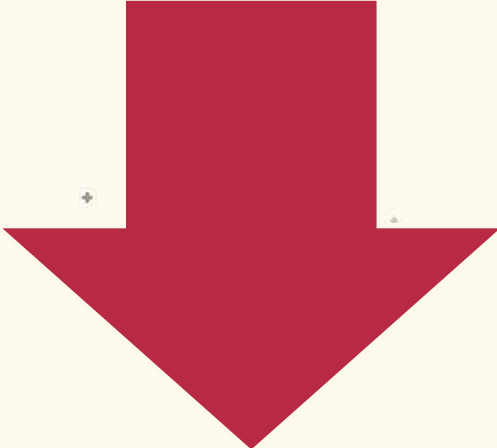


“A quality authorizer implements a comprehensive application process that...follows fair, transparent procedures and rigorous criteria.”

FLOW OF EVIDENCE



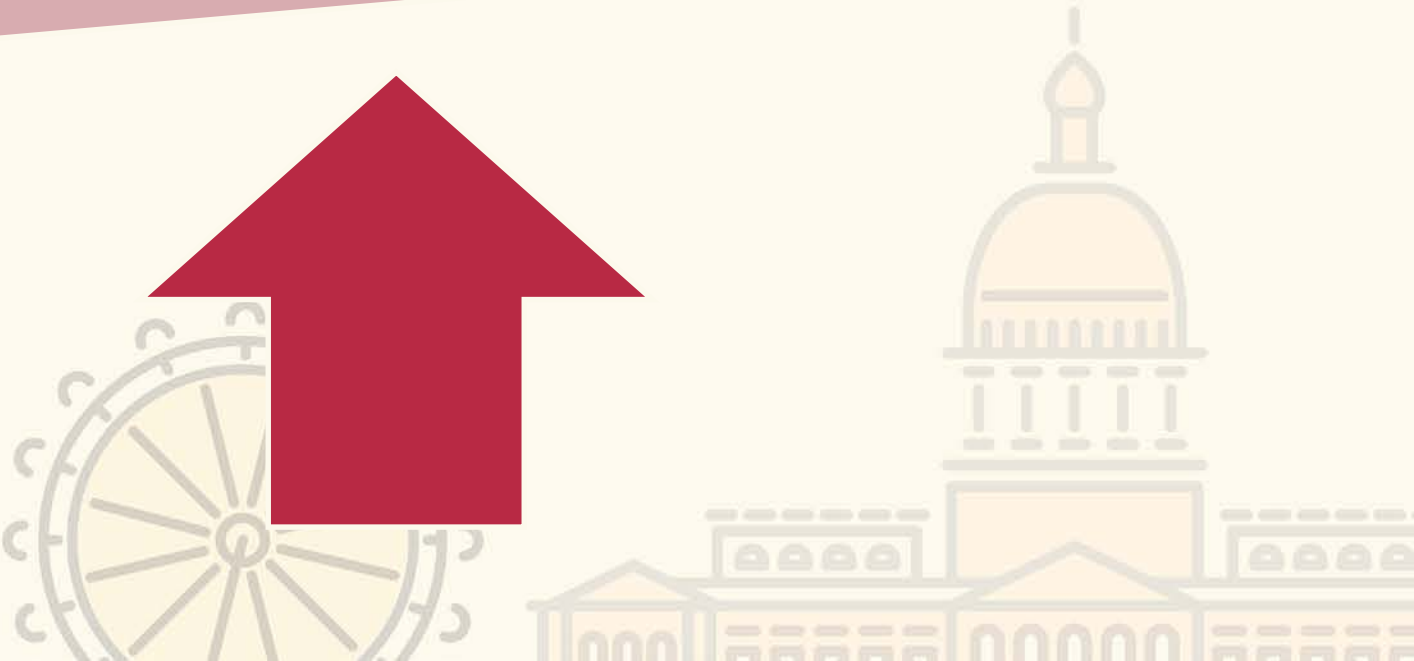
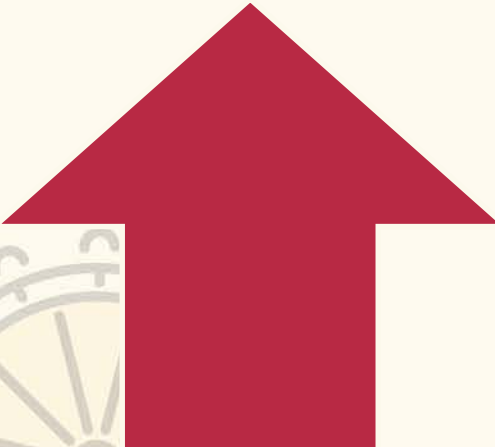
TYPES OF EVIDENCE



Quantity
of
Evidence



Quality of
Evidence



HOW TO GET QUALITY EVIDENCE

1. Run a consistent process
2. Use standardized forms
3. Train, train, train!
4. Demand detail



QUALITY EVIDENCE!

#NACSAcon

Program will have the following characteristics:

Education Program Overview

This section is not "rated" by the evaluators; however, all other sections of the Education Program will be evaluated for alignment with the overview.

Curriculum and Instructional Design

- Framework for a rigorous, quality instructional design that reflects the needs of the school's target population and will ensure all students meet or exceed the expectations of Alabama College and Ready Ready Standards aligned with the Common Core State Standards (if applicable).
- Comprehensive, quality curriculum overview that includes a sample course scope and sequence for one subject for one grade for each division (elementary, middle, high school) the school would serve, and demonstrated alignment of course outcomes with applicable standards. Sound curricular choices, by subject, including reasonable evidence the curriculum will be appropriate and effective for the targeted students.
- Sound instructional strategies and explanation of why they are well suited for the targeted student population, including effective methods and systems for providing differentiated instruction to meet the needs of all students.
- Evidence that the proposed educational program has a sound base in research, theory, and/or experience, and has been or is likely to be rigorous, engaging, and effective for the anticipated student population.

| Initial Application Review | | |
|---|--|---|
| <input type="checkbox"/> Meets the Standard | <input checked="" type="checkbox"/> Partially Meets the Standard | <input type="checkbox"/> Does Not Meet the Standard |
| <p>COMMENTS: The proposal adequately offers an instructional design that aligns with the Alabama College and Career Standards. The Sports-Themed Scope and Sequence (attachment 1) cover the necessary standards while also providing lessons that are relevant to students. SLAM's proposed instructional strategies are comprised of strategies that, when properly implemented, are proven to meet the needs of all students. In particular, the use of Differentiated Instruction, technology integration, project based learning, and Response to Intervention are proven instructional strategies.</p> <p>While the proposal, adequately provides a Curriculum and Instructional Design that is adequate and appropriate for elementary students. There is little to no evidence of how the proposed design meets the specific needs of the students in Madison County.</p> | | |
| After Capacity Interview | | |
| <input type="checkbox"/> Meets the Standard | <input type="checkbox"/> Partially Meets the Standard | <input type="checkbox"/> Does Not Meet the Standard |
| COMMENTS: | | |



STANDARDIZED FORMS!

Section I: School Culture

1. A Vision and Mission

Meets Expectations (4-5 pts.)

1. This vision statement would provide the entire school community, as well as external stakeholders, clear description of the unique focus of the school.
2. The mission statement defines how the school will accomplish the vision and meet the needs of the school's target student population.
3. The mission and vision serve as the foundational driver for the school's systems, structures, and practices (as evident in the rest of the application).

Please select a score.

- 0 1 2 3 4 5

1. A Strengths, Weaknesses, or Questions

1. B Targeted Student Population

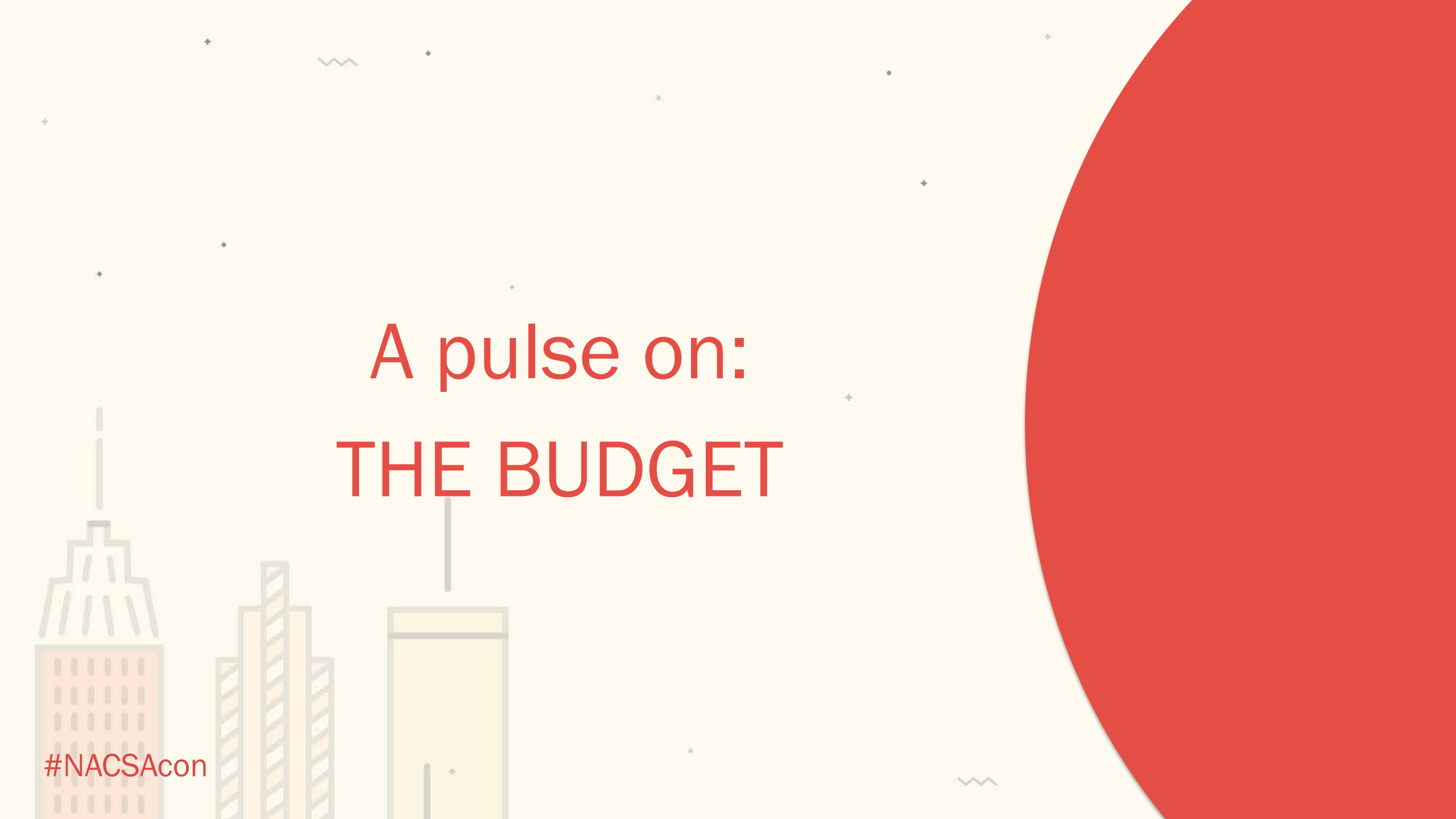
Meets Expectations (4-5 pts.)

1. There is detailed research on and demonstrated understanding of the student population in a clearly identified neighborhood/region, including grade levels and ages, expected demographics (%FRL, %ELL, %SPED, race, ethnicity), achievement data, and academic needs.
2. A compelling explanation of how the specific school model would meet the needs of of the target student population.

Please select a score.

- 0 1 2 3 4 5

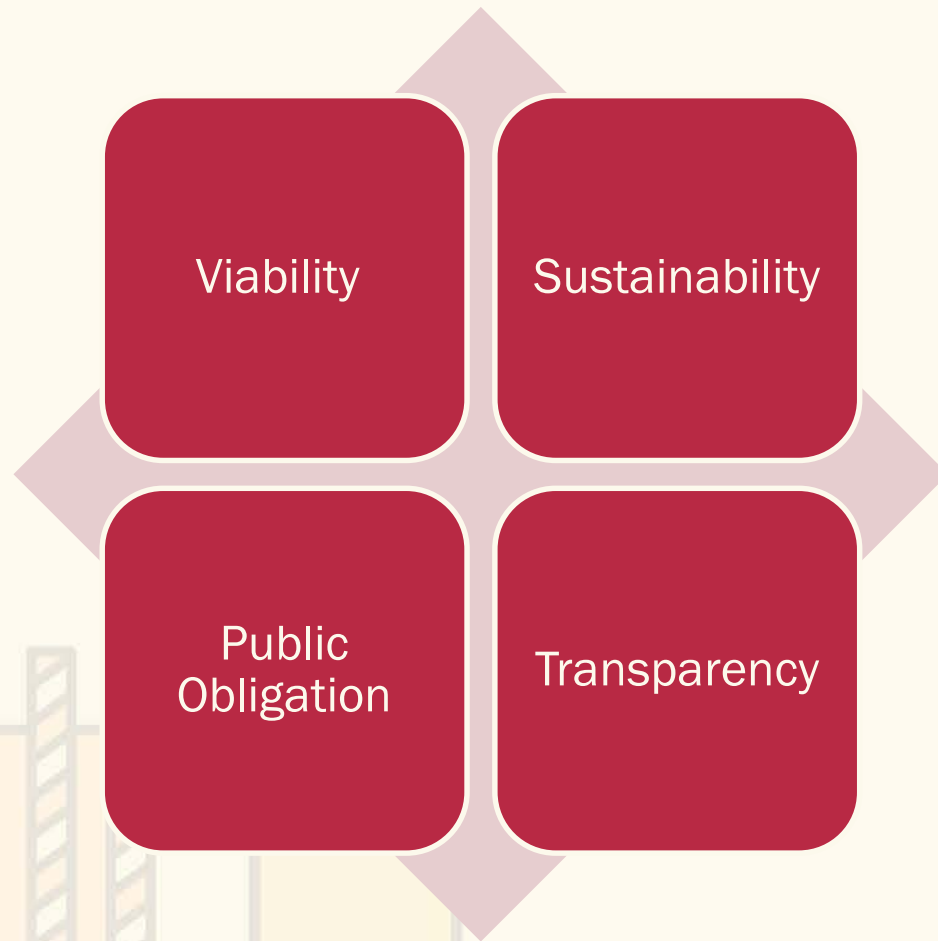
1. B Strengths, Weaknesses, or Questions

A stylized city skyline is visible in the bottom left corner, featuring a prominent skyscraper with a tiered top and several other buildings of varying heights. A large, solid red circle, representing a sun or moon, is positioned on the right side of the slide. The background is white with scattered small grey dots and wavy lines.

A pulse on: THE BUDGET

#NACSAcon

WHY IS A SOUND BUDGET IMPORTANT?



“Charter schools are not just educational institutions; they have the responsibility to manage all operations, including ensuring a balanced budget.”

-Cannata, Thomas and Thombre, “Starting Strong: Best Practices in Starting a Charter School.”

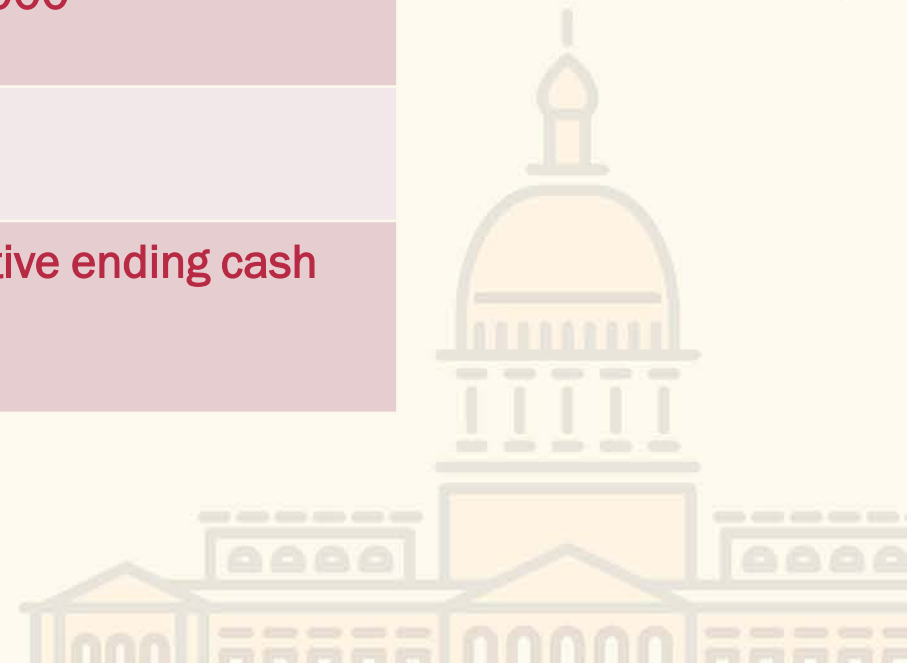
EXCELLENT EDUCATION STEM CHARTER SCHOOL

- ✓ Opening in Fall 2017
- ✓ K-8, 500 students
- ✓ Integrated STEM focus with 1:1 technology
- ✓ Laboratory classes beginning in 3rd grade



EXCELLENT EDUCATION STEM CHARTER SCHOOL: BUDGET ANALYSIS

| Item | Cost |
|---|---------------------------|
| Computers | \$3,000 |
| Textbooks & Supplies | \$1,500 |
| Facility Renovations (location was previously a Dick's Sporting Goods) | \$15,000 |
| Special Education Teachers & Services | \$0 |
| Years 1 and 2 | negative ending cash flow |



SHOW ME THE MONEY!

- ✓ Understand how funding is generated
- ✓ Understand when funding is generated
- ✓ Understand what (if anything) gets forward-funded



HOW TO QUICKLY ASSESS BUDGET QUALITY

Does the budget...

- Reflect their plan as articulated in their petition narrative?
- Demonstrate an understanding of the breadth and scope of expenses that will be incurred?
- Contemplate a positive cash-flow?
- Correctly amortize up-front expenditures?



UNDERSTANDING INTERNAL CONTROLS

Does the applicant demonstrate an understanding of –

- ✓ Fiscal policies and procedures
(e.g. Purchasing, Check Signature, etc.)
- ✓ Physical controls
- ✓ Segregation of Duties



PRACTICAL CONSIDERATIONS

Other things that you may want to consider–

- ✓ Authorizer staffing
- ✓ Expertise of evaluators
- ✓ Resources for evaluators
- ✓ Expertise of applicants
- ✓ Resources for applicants

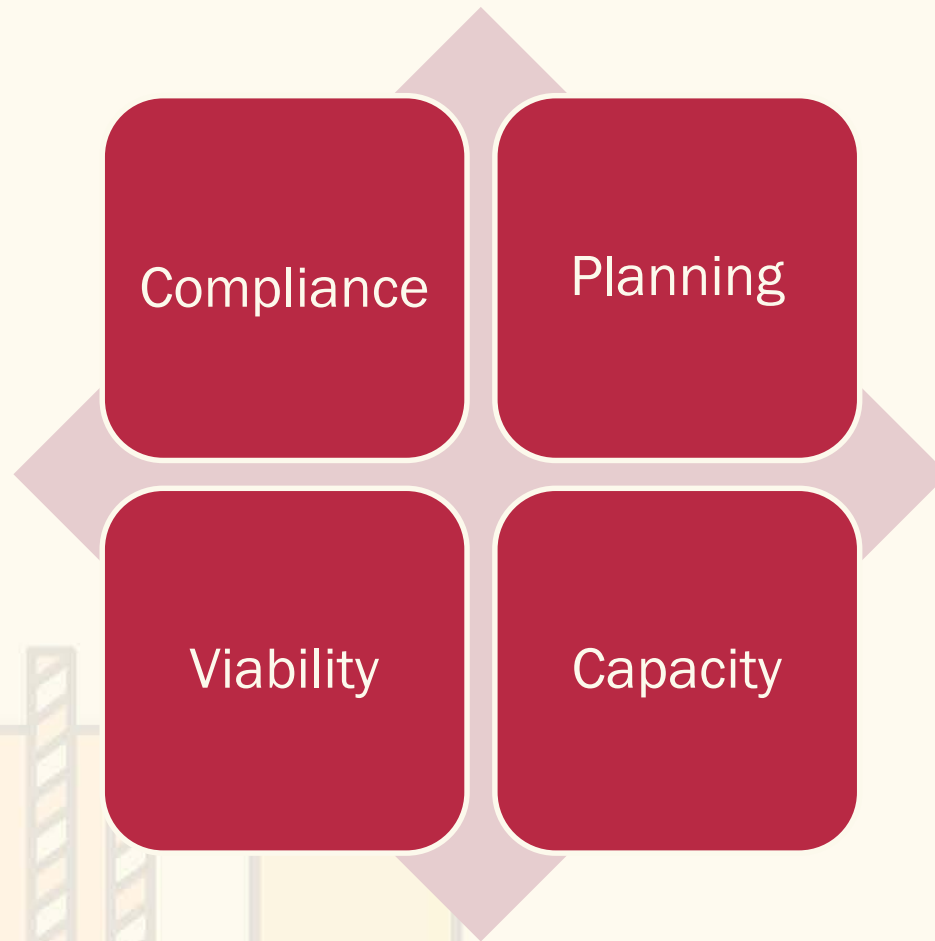




A pulse on: THE START UP PLAN

#NACSAcon

WHY IS A STRONG START UP PLAN IMPORTANT?



“Starting a new school involves many challenges – managing the budget, acquiring suitable facilities, designing the instructional program, and hiring teachers, to name a few...[S]uccessfully navigating these challenges to achieve a strong start-up is critical to new charter schools.”

- Cannata, Thomas and Thombre, “Starting Strong: Best Practices in Starting a Charter School.”

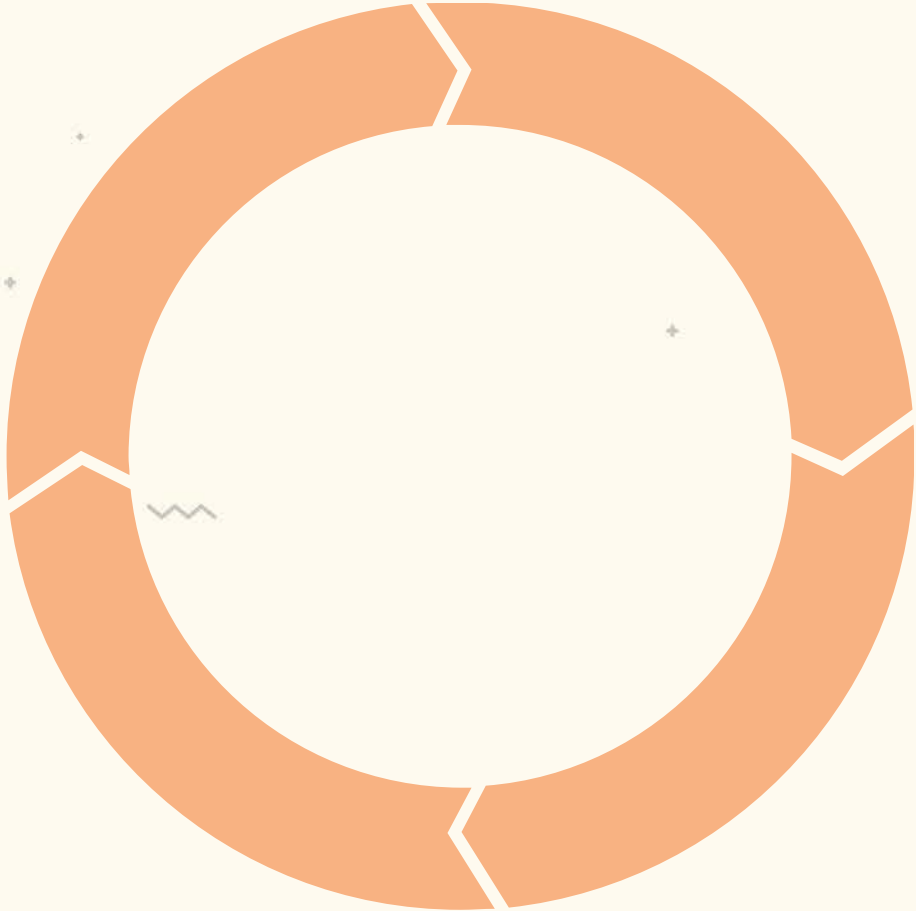
START UP PLAN ESSENTIALS

**EDUCATIONAL
PROGRAMMING**

**FINANCE &
OPERATIONS**

STUDENTS

PERSONNEL



START UP PLAN ESSENTIALS – EDUCATIONAL PROGRAMMING

- ✓ Finalize curriculum and instructional resources
- ✓ Plan professional development opportunities
- ✓ Select a Student Information System
 - ✓ Ensure compatibility with any state systems
- ✓ Finalize school calendar



START UP PLAN ESSENTIALS – FINANCE & OPERATIONS

- ✓ Transition Petition Budget to an Operational Budget
 - ✓ Determine funding for Year One
- ✓ Finalize your facility
 - ✓ Ensure construction or renovation will allow for an on-time opening
- ✓ Create Policies
 - ✓ Students
 - ✓ Employees
 - ✓ Fiscal
 - ✓ Health and Safety
 - ✓ Privacy & Confidentiality



START UP PLAN ESSENTIALS - PERSONNEL

- ✓ Hire a school leader
- ✓ Finalize benefit packages
 - ✓ Insurance, retirement, etc.
- ✓ Identify key roles, create job descriptions & recruit



PLANNING YEAR ESSENTIALS - STUDENTS

- ✓ Ramp up marketing and recruitment
- ✓ Ensure a fair and legal application and lottery process
- ✓ Verify actual student enrollment is on-track to meet projections



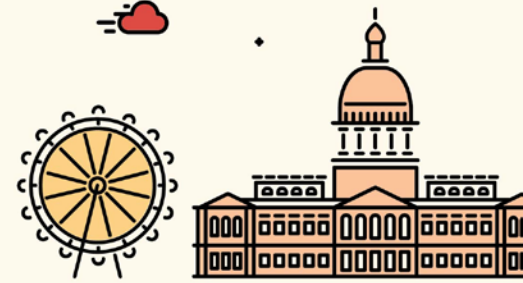
RESOURCES FOR YOU!

Sample Conflict of Interest Form

#NACSAcon



QUESTIONS?



#NACSAcon

KEEP IN TOUCH

Morgan Felts

Petitions Manager, State Charter Schools Commission of Georgia

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Christopher DeWitt

New Schools Manager, Denver Public Schools

 CHRISTOPHER_DEWITT@dpsk12.org

Erin Reddy

Manager, NACSA

 erinr@qualitycharters.org

