

**SUBJECT**

PCSC Discussion: New Charter Petition Consideration Process and Basis for Decision-Making

**APPLICABLE STATUTE, RULE, OR POLICY**

I.C. §33-5205

**BACKGROUND**

In late 2018, the National Association of Charter School Authorizers (NACSA) performed a formative evaluation of the PCSC. In June 2019, the PCSC reviewed NACSA's recommendations and agreed to pursue some while setting others aside.

**DISCUSSION**

The PCSC requested an opportunity to further discuss its processes and basis for decision-making regarding new charter petitions. This discussion point was raised in reference to NACSA's recommendation that the PCSC "approve only petitions from founding teams that have sufficient capacity to oversee and run high-quality schools."

**IMPACT**


Information item only.

**STAFF COMMENTS AND RECOMMENDATIONS**

Staff notes that existing PCSC processes for the evaluation of new charter petitions comply with and exceed the requirements of Idaho statute. However, the PCSC has authority to change its processes within the bounds of those requirements.

**COMMISSION ACTION**

Information item only.



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

# PETITION EVALUATION REPORT & STANDARDS OF QUALITY



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Updated 7/22/19

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# PETITION EVALUATION REPORT



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## Petition Review Summary

### Summary

Notes from the PCSC Staff will appear here.

### Summary of Section Ratings

Section 1: Educational Program ↓↓

MEETS STANDARD

Section 2: Financial & Facilities Plan ↓↓

DOES NOT MEET STANDARD

Section 3: Board Capacity and  
Governance Structure ↓↓

EXCEEDS STANDARD

Section 4: Student Demand & Primary  
Attendance Area ↓↓

FALLS FAR BELOW STANDARD

Section 5: School Leadership and  
Management ↓↓

MEETS STANDARD

Section 6: Virtual Schools ↓↓

NOT APPLICABLE

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## Section I: Educational Program

MEETS STANDARD

READ MORE: [Standards of Quality](#)

### Comments

Detailed commentary and references to specific standards of quality applicable to the noted strength or concern will appear here.

### Detail

#### Strengths:

- Strength
- Strength

#### Concerns:

- Concern
- Concern

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## Section II: Financial and Facilities Plan

MEETS STANDARD

READ MORE: [Standards of Quality](#)

### Comments

Detailed commentary and references to specific standards of quality applicable to the noted strength or concern will appear here.

### Detail

#### Strengths:

- Strength
- Strength

#### Concerns:

- Concern
- Concern

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## Section III: Board Capacity and Governance Structure

MEETS STANDARD

READ MORE: [Standards of Quality](#)

### Comments

Detailed commentary and references to specific standards of quality applicable to the noted strength or concern will appear here.

### Detail

#### Strengths:

- Strength
- Strength

#### Concerns:

- Concern
- Concern



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## Section IV: Student Demand and Primary Attendance Area

MEETS STANDARD

READ MORE: [Standards of Quality](#)

### Comments

Detailed commentary and references to specific standards of quality applicable to the noted strength or concern will appear here.

### Detail

#### Strengths:

- Strength
- Strength

#### Concerns:

- Concern
- Concern

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## Section V: School Leadership and Management

MEETS STANDARD

READ MORE: [Standards of Quality](#)

### Comments

Detailed commentary and references to specific standards of quality applicable to the noted strength or concern will appear here.

### Detail

#### Strengths:

- Strength
- Strength

#### Concerns:

- Concern
- Concern

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## Section VI: Virtual Schools

MEETS STANDARD

READ MORE: [Standards of Quality](#)

### Comments

Detailed commentary and references to specific standards of quality applicable to the noted strength or concern will appear here.

### Detail

#### Strengths:

- Strength
- Strength

#### Concerns:

- Concern
- Concern

# STANDARDS OF QUALITY



## Introduction Checklist

### 1. Formatting

- All pages are legible in the final PDF (i.e. font size, quality of copy, etc.)
- Petition is continuously paginated
- Section headings and references to appendices are bookmarked and/or hyperlinked

### 2. Cover Page Requirements

- Name of the school
- Year the school intends to open
- General location of the school (such as school district, county, city, etc.)
- Contact information for the primary representative of the petitioning group (including name, address, phone number, and e-mail address)

### 3. Table of Contents

- Organized in alignment with the New Charter Petitioner Guidance document
- Page numbers are accurate
- Section titles are hyperlinked to the corresponding page of the petition

### 4. Executive Summary

- One page maximum
- Introduces the school's organizational structure
- Introduces the school's educational program
- Provides an overview of the community need for such a program
- Summarizes student outcome expectations

### 5. Mission Statement

- Succinctly relays the purpose and educational philosophy of the school

## Section I: Educational Program

### 1. General Standards of Quality

- a. **Thorough and Compliant** - The petition provides a thorough explanation of the intended educational program.
- b. **Supported and Credible** - The petition includes references to relevant research and documentation of the success of the proposed model. Alternatively, if the model is new and research is unavailable, the petition describes the reasoning behind the approach.
- c. **Connected and Cohesive** - The petition presents an overall educational program that is aligned to the mission and vision and is cohesive with other sections of the petition.

### 2. Educational Philosophy (New Charter Petitioner Guidance, Pg.8)

- a. The educational philosophy clearly relates to the school's mission and instructional model.
- b. Research and widely accepted best practices support the educational philosophy.

### 3. Student Academic Achievement Standards (New Charter Petitioner Guidance, Pg.8-9)

- a. Academic and programmatic goals convey the educational program's anticipated achievement outcomes.
- b. Academic and programmatic goals reflect high standards for the target population.
- c. The goals are logically connected to the school's mission.

### 4. Key Educational Design Elements, Curricula, Tools, & Instructional Methods (New Charter Petitioner Guidance, Pg.9-10)

- a. Key design elements are thorough and directly relate to the educational program as well as the mission and vision of the proposed school.
- b. Explanations and examples of instructional practices, types of curricula, and tools are detailed, realistic, and consistent with the proposed educational program.

### 5. Strategies for Serving Special Populations (New Charter Petitioner Guidance, Pg. 10 - 11)

- a. The special services plan is complete and addresses the needs of special populations, including, but not limited to: special education, at-risk, gifted, and English Language Learners.

- c. The special populations plan appears feasible within the constraints of the proposed academic program.
- d. The plan demonstrates an understanding of the unique needs of the special populations in the proposed target market.

6. Professional Development Plan (New Charter Petitioner Guidance, Pg. 11)

- a. The professional development plan addresses new teacher orientation and onboarding.
- b. The professional development plan includes training specific to the proposed educational model as well as the systems and structures for efficient school operations.
- c. The plan aligns with the school calendar and provides learning opportunities for both groups and individuals as well as varied delivery formats such as guest professionals, off-site trainings, and professional learning communities.

## Section 1: Related Appendices

### Appendix F: Optional Supporting Documents

- a. No appendices are required for Section I. Optional appendices support the educational program's credibility.
- b. Each document is numbered within this section (i.e. F1, F2, F3, etc.).

[Back to petition evaluation report](#)

## Section II: Financial and Facilities Plans

### 1. General Standards of Quality

- a. **Thorough and Compliant** - The financial plan and budget template evidence a thorough understanding of federal and state funding mechanisms and distributions as well as the costs associated with school operations. Revenue estimates include realistic variables and restricted funds are used appropriately.
- b. **Supported and Credible** - The petition includes sufficient documentation, assumptions, and details to demonstrate the validity of revenue and expenditure estimates.
- c. **Connected and Cohesive** - The petition's financial and facilities plan meets the stated needs of the academic program and the intended student body. The financial narrative and the budget template are aligned.

### 2. Fiscal Philosophy and Spending Priorities (New Charter Petitioner Guidance, Pg.12)

- a. The fiscal philosophy and spending priorities align to the mission and vision of the school.
- b. The spending priorities provide for effective school operations.
- c. The spending priorities present appropriate use of taxpayer dollars.

### 3. Transportation and Food Service Plans (New Charter Petitioner Guidance, Pg.12)

- a. The transportation plan (if provided) is compliant and meets the needs of the intended student population.
- b. The nutrition plan (if provided) is compliant and meets the needs of the intended student population.
- c. Cost estimates are credible and supported.
- d. The facility design and staffing plan appropriately support the stated plans for transportation and nutrition.



4. Financial Management and Monitoring Plan (New Charter Petitioner Guidance, Pg.12)
  - a. The financial management and monitoring plan identifies the board’s fiscal governance role.
  - b. The organizational structure ensures appropriate accounting expertise either by including a business manager in the staffing plan or by contracting out services to an experienced organization. (If contracting out for services, the petition outlines the specific duties to be contracted and includes any contracts or MOUs executed to date.)
  - c. The plan evidences an understanding of financial policy including accounting practices, internal controls, and related internal procedures.
  
5. Facilities Plan (New Charter Petitioner Guidance, Pg.13)
  - a. The two facility options are detailed, realistic, and meet the school’s programmatic needs.
  - b. The proposed school location(s) is easily accessible to the intended student population and lies within the primary attendance area.
  - c. The square footage, outdoor space, and specialty features meet the needs of the educational model.

## Section II: Related Appendices

### Appendix A1: Financial Summary

- a. See New Charter Petitioner Guidance, pg.20-21, for more information.
- b. The financial summary, which automatically populates, provides a one-page overview of the school’s plan.

### Appendix A2: Pre-Opening Budget

- a. See New Charter Petitioner Guidance, pg.20-21 for more information.
- b. The pre-opening budget is aligned to the school’s start-up plan (as described throughout the narrative) through June 30th of the pre-operational year. Revenues and expenditures are supported and credible.

### Appendix A3: Three-Year Operating Budget and Break-Even Year 1 Scenario

- a. See New Charter Petitioner Guidance, pg. 20-21, for more information.
- b. The three-year budget provides appropriate detail for the first few years of the school’s operation based on realistic enrollment expectations.

- c. The budget includes a functional break-even, or “plan B” budget for the first year of operation that shows how the school can survive if it does not meet anticipated enrollment numbers. Revenues and expenditures are supported and credible.

#### Appendix A4: Cash Flow Projection for Initial Operating Year

- a. See New Charter Petitioner Guidance, pg. 20-21, for more information.
- b. The cash flow aligns to the “full enrollment year 1 budget” column on the Operational Budgets tab. The presented budget appropriately accounts for the staggered timing of state distributions of funds and the appropriate timing of various expenditures.

#### Appendix A5: Facility Options

- a. See New Charter Petitioner Guidance, pg. 20-21, for more information.
- b. The two or more facility options, outlined on the PCSC facilities template, are realistic.
- c. Cost estimates are realistic and consider soft and hard costs of the proposed facility.

#### Appendix F: Optional Supporting Documents

- a. Additional appendices to support the Financial and Facilities Plan Section may be included in Appendix F.
- b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

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## Section III: Board Capacity and Governance Structure

### 1. General Standards of Quality

- a. **Thorough and Compliant** - The articles and of incorporation and bylaws are legally compliant and address all necessary content. The petition demonstrates an understanding of the charter school board's legal responsibilities. The narrative and attachments effectively communicate the board's capacity to govern.
- b. **Supported and Credible** - The petition includes documentation of executed bylaws and filed articles of incorporation.
- c. **Connected and Cohesive** - The board membership and structure match the needs of the educational program and the oversight of school operations.

### 2. Governance Structure (New Charter Petitioner Guidance, Pg.13)

- a. The governance structure includes detailed descriptions of the roles that officers and board committees will play.
- b. The division of duties between governance and management are clear and appropriate.
- c. The governance structure grants the board direct oversight over school leadership and the evaluation of school leaders.
- d. The articles of incorporation and bylaws are consistent with the petition narrative.

### 3. Board Member Qualifications (New Charter Petitioner Guidance, Pg.13)

- a. The board member qualifications section includes a list of directors currently serving, states each director's term of service, and establishes each director's capacity to govern (qualifications, experience, etc.).
- b. Board membership reflects diverse experience and skills (such as education, law, real estate, management, financial planning, and/or community outreach).

### 4. Transition Plan (New Charter Petitioner Guidance, Pg.13-14)

- a. The board's transition plan from founding to the work of governance is clear and likely to be effective.
- b. The transition plan addresses concrete ways to avoid the pitfalls of "founders' syndrome."
- c. The plan includes a list of the current board members who intend to resign in order to apply for a paid position, if the school is approved.
- d. The transition plan accounts for the consistent stewardship of the school's mission and vision.

## 5. Board Member Recruitment and Training (New Charter Petitioner Guidance, Pg.14)

- a. A comprehensive board training plan for sustaining high-quality governance includes an identification of the scope of skills the board desires to maintain, strategies for recruitment, and processes for grooming, selecting, and onboarding new directors.
- b. Board training is detailed, specific, and comprehensive, and addresses the needs of the initial board as well as future board members.
- c. The board training plan allows for self-reflection and opportunities for stakeholders to provide feedback.

## Section III: Related Appendices

### Appendix B: Articles of Incorporation and Corporate Bylaws (New Charter Petitioner Guidance, Pg.22-23)

- a. Articles of incorporation are filed with the secretary of state prior to submitting the petition for review by the PCSC. The petition includes a signed copy of the articles.
- b. Included bylaws outline a clear process for selection of members of the school's board of directors, including: number and designation of seats, board member terms, elections vs. appointments, nomination and voting procedures, eligible voters, applicable definitions, etc.

### Appendix C: Board of Directors and Petitioning Group (New Charter Petitioner Guidance, Pg.23)

- a. Resumes establish each board member's credibility with regard to their service on the board.
- b. Includes a list of all persons in the petitioning group who are significantly involved in the development of the proposed school and their relevant skills.
- c. "Founders" are defined for the purposes of the enrollment lottery preference are listed.

### Appendix F: Optional Supporting Documents

- a. Additional appendices to support the Board Capacity and Governance Structure Section may be included in Appendix F.
- b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

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## Section IV: Student Demand and Primary Attendance Area

### 1. General Standards of Quality

- a. **Thorough and Compliant** - The petition's proposed educational program reflects the needs and demands of the local community.
- b. **Supported and Credible** - The petition includes evidence of research to document demographics and student demand.
- c. **Connected and Cohesive** - The information presented in this section aligns with the structure and intent of the educational program and facility plans.

### 2. Primary Attendance Area (New Charter Petitioner Guidance, Pg.15)

- a. The primary attendance area is clearly described and appears appropriate.

### 3. Student Demand (New Charter Petitioner Guidance, Pg.15-16)

- a. The student demand section describes and documents the need for the academic program in the identified area and provides evidence of student interest/demand for the school.
- b. The student demand section describes the demographics (documented with credible source data) of the intended neighborhood in which the school will be located.

### 4. Student Population (New Charter Petitioner Guidance, Pg.16)

- a. The intended student population is clear.
- b. The intended student population can be supported by community and district demographics.
- c. The estimate of the anticipated number of students the school expects to serve who will require special services is supported and credible.
- d. The staffing and educational plan is likely to support adequate special services, especially for FRL, special needs, and/or ELL students.

5. Enrollment Capacity (New Charter Petitioner Guidance, Pg.16-17)
  - a. Capacity estimates include whole school and grade-level.
  - b. The growth plan is clear and complete from year one through year five or to final expansion.
  - c. The enrollment goals for each year and for the school at capacity are reasonable and supported by credible data.
  - d. The detailed marketing and recruitment plan allocates adequate staff support and funds to the effort and the plan will likely result in the school meeting its enrollment goals.
  
6. Community Partnerships and Local Support (New Charter Petitioner Guidance, Pg.17)
  - a. The level of community engagement with the proposed model is appropriate and adequate.
  - b. Documented partnerships and local support align to the mission of the school.
  
7. Enrolling Underserved Families (New Charter Petitioner Guidance, Pg.17)
  - a. Strategies for reaching at-risk, diverse, and underserved families, as well as families that might not be aware of the school, are well developed.
  - b. Strategies for initial recruitment, as well as ongoing family and community engagement, appear reasonable and likely to be successful.

## Section IV: Related Appendices

### Appendix F1: District Notification Letter

- a. Appendix F1 includes a dated and signed letter to the district that meets the requirements outlined in I.C. §33-5205.

### Appendix F: Optional Supporting Documents

- a. Additional appendices to support the Student Demand and Primary Attendance Area Section may be included in Appendix F.
- b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

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## Section V: School Leadership and Management

### 1. General Standards of Quality

- a. **Thorough and Compliant** - The petition describes the leadership structure including a description of the experience, qualities, and/or management style of the “right” leader for this school and details regarding the division of duties if a co-director structure is proposed. The petition also evidences clear understanding of [the Idaho Standards for Effective Principals](#).
- b. **Supported and Credible** - The petition includes documentation to support the likely success of the proposed leadership and/or management plan.
- c. **Connected and Cohesive** - The leadership and management plan is aligned to other sections of the petition, including the educational program, organizational chart, and budget.

### 2. Leadership Team (New Charter Petitioner Guidance, Pg.17)

- a. The narrative describes the responsibilities of and relationships among school leadership, the governing board, instructional leaders, and staff.
- b. The petition includes a plan for evaluating school leader(s).

### 3. Educational Services Provider (if applicable) (New Charter Petitioner Guidance, Pg.17-18)

- a. If the school has chosen to work with an EMO, CMO, or ESP to provide leadership and/or management services:
  - This section includes the contact information for a representative from the organization or provider and other pertinent information such as other locations where the organization or provider operates, any available achievement, operational, and financial data, and any DBAs.
  - This section details the nature and extent of the entity’s participation in the management and operation of the school.
  - This section describes how the school’s board will regularly evaluate the performance of the EMO, CMO, or ESP.

## Section V: Related Appendices

### Appendix D: School Administration and Organization Chart (New Charter Petitioner Guidance, Pg.23)

- a. The organizational chart includes board of directors, administration, business management, contractors (including EMO/CMO, if applicable), and support staff.
- b. If the lead administrator has been identified, Appendix D includes his/her resume and additional pertinent information, including real or potential conflicts of interest.
- c. If the lead administrator has not been identified, Appendix D includes job descriptions and/or description of responsibilities for key leadership positions.

### Appendix E: Education Service Provider (if applicable) (New Charter Petitioner Guidance, Pg.24)

- a. A thorough term sheet provides the term length and termination agreement.
- b. If applicable, Appendix E includes the two most recent contracts that the ESP has executed with operating charter schools.
- c. The detailed description of the ESP's relationship to the school's board includes any conflicts of interest.
- d. If applicable, the detailed description of how and why the management organization or educational service provider was selected provides evidence that the organization provides high-quality service to similar schools.

### Appendix F: Optional Supporting Documents

- a. Additional appendices to support the School Leadership and Management Section may be included in Appendix F.
- b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

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## Section VI: Virtual and Blended Schools

### 1. General Standards of Quality

- a. **Thorough and Compliant** - The petition provides a detailed description of the proposal, and establishes the need for such a program.
- b. **Supported and Credible** - The petition includes documentation to evidence the validity of the chosen Learning Management system (LMS), curriculum, and instructional structure.
- c. **Connected and Cohesive** - The design of the program is aligned to other sections of the petition including, but not limited to, the budget, staffing plan, and mission.

### 2. Learning Management System (New Charter Petitioner Guidance, Pg.18)

- a. The description of the chosen LMS addresses the technology platform, curriculum, and rationale for the structure of the program.
- b. The LMS appears adequate to fulfill the mission and meet identified goals.
- c. All students can be served via the identified LMS.

### 3. Educational Program-Virtual and Blended (New Charter Petitioner Guidance, Pg.19-20)

- a. There is a strong rationale for use of a virtual program, rather than a brick-and-mortar program, to fulfill the mission and meet stated goals.
- b. The plan to ensure all students have access to the virtual educational program is complete and demonstrates thoughtfulness and planning of petitioners to market to and address educational needs of all students.
- c. The expectations for online teachers include required availability and the role that he/she plays in individualizing and providing guidance on course material.
- d. The student work assessment plan includes the level of teacher involvement required in evaluating and responding to student performance.
- e. The described means by which student will interact with teachers includes timely and frequent feedback about student progress.
- f. The opportunities for student-to-student interaction are practical, diverse, and likely to cultivate school community.
- g. The educational program offers new opportunities for families.

#### 4. Technology (New Charter Petitioner Guidance, Pg.20)

- a. A plan for ensuring equal access to all students includes the provision of necessary hardware, software, and internet connectivity required for participation in online coursework.
- b. The plan for provision of technical support relevant to the delivery of online courses is cost-effective, timely, and supported by adequate staff.
- c. The plan for training students and parents in the use of hardware and software is practicable.

#### 5. Professional Development (New Charter Petitioner Guidance, Pg.20)

- a. The strategies for professional development specific to education in the virtual environment address both initial and ongoing training.
- b. The teacher evaluation plan includes strategies specific to virtual education.

#### 6. Data Collection/Attendance and Course Credit (New Charter Petitioner Guidance, Pg.20)

- a. The means of verifying student attendance demonstrate that attendance will focus primarily on coursework and activities correlated to the thoroughness standards.
- b. The proposed means of awarding course credit are adequate.
- c. The strategies for administering standardized testing to all students are practicable and affordable.

## Section VI: Related Appendices

### Appendix F: Optional Supporting Documents

- a. No appendices are required to support Section VI. Optional appendices support the virtual educational program's credibility.
- b. Each document is numbered within this section (i.e. F2, F3, F4, etc.).

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IDAHO PUBLIC CHARTER SCHOOL COMMISSION  
**APPENDIX A: BUDGET TEMPLATE**



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Alan Reed, Chairman  
Tamara Baysinger, Director



<b>Financial Summary</b>					
Worksheet Instructions: This page will auto-populate as you complete the Pre-Operational and Operational Budget tabs.					
<b>Revenue</b>					
Anticipated Enrollment for Each Scenario:		0	0	0	0
	Pre-Operational Budget	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget
Cash on Hand/ Other Revenue Sources	\$0.00	\$0.00	NA	NA	\$0.00
Contributions/ Donations	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Loans	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grants	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Base Support	NA	\$0.00	\$0.00	\$0.00	\$0.00
Salary and Benefit Apportionment	NA	\$0.00	\$0.00	\$0.00	\$0.00
Transportation Allowance	NA	\$0.00	\$0.00	\$0.00	\$0.00
Special Distributions	NA	\$0.00	\$0.00	\$0.00	\$0.00
<b>REVENUE TOTAL</b>	-	\$0.00	\$0.00	\$0.00	\$0.00
<b>Expenditures</b>					
	Pre-Operational Budget	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget
Staff and Benefit Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Educational Program Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Technology Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Capital Outlay Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Board of Directors Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Facilities Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Transportation Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Nutrition Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>EXPENSE TOTAL</b>	-	\$0.00	\$0.00	\$0.00	\$0.00
<b>OPERATING INCOME (LOSS)</b>	-	\$0.00	\$0.00	\$0.00	\$0.00
<b>PREVIOUS YEAR CARRYOVER</b>		-	\$0.00	\$0.00	\$0.00
<b>NET INCOME (LOSS)</b>	-	\$0.00	\$0.00	\$0.00	\$0.00

**Idaho Public Charter School Commission  
Charter Petition: Pre-Operational Budget**

**Worksheet Instructions:** list revenues, expenditures, and Full-Time Equivalencies (FTE) anticipated during the pre-operational year. Insert rows as necessary throughout the document. Include notes specific to start-up costs (details, sources, etc.) in the Assumptions column.

**Pre-Operational Revenue**

Line Item / Account	Budget	Assumptions / Details / Sources
Donations and Contributions		Only include secured funds. Sum all donations/contributions here. Provide documentation for each donation/contribution as appendices.
Loans		Include documentation that provides the lender, term, rate, and total principal.
Grants		Only include secured grants. Provide documentation of grantor, total amount, and any applicable restrictions or requirements.
Other Revenue		Include details and documentation as necessary.
<b>REVENUE TOTAL</b>	<b>\$0.00</b>	

Additional Notes or Details Regarding Revenues:

## Pre-Operational Expenditures

### Section 1: Staffing

1a: CERTIFIED STAFF	Budget		Assumptions / Details / Sources
Classroom Teachers	FTE	Amount	
Elementary Teachers			
Secondary Teachers			
Specialty Teachers			
Classroom Teacher Subtotals	0.0	-	Average classroom size:
Special Education	FTE	Amount	
SPED Director / Coordinator			
Special Education Teacher			
Special Education Subtotals	0.0	-	Anticipated % Special Education Students:
Other Certified Staff	FTE	Amount	
Lead Administrator			
Assistant Administrator			
Other Certified Staff Subtotals	0.0	-	
<b>CERTIFIED STAFF TOTAL</b>	<b>0.0</b>	<b>-</b>	

1b: CLASSIFIED STAFF	Budget		Assumptions / Details / Sources
Position	FTE	Amount	
Paraprofessionals- General			
Paraprofessionals- SPED			
Admin / Front Office Staff			
<b>CLASSIFIED STAFF TOTAL</b>	<b>0.0</b>	<b>-</b>	

1c: BENEFITS	Budget		Assumptions / Details / Sources
Type	Rate	Amount	
Retirement			
Workers comp			
FICA/Medicare			
Group insurance			
Paid time off (provide assumptions)			
<b>BENEFITS TOTAL</b>		<b>-</b>	

<b>CERTIFIED &amp; CLASSIFIED STAFF TOTAL</b>	<b>-</b>	
<b>TOTAL STAFF &amp; BENEFITS TOTAL</b>	<b>-</b>	

Section 2: Educational Program		
<b>2a: OVERALL EDUCATION PROGRAM COSTS</b>	<b>Budget</b>	<b>Assumptions / Details / Sources</b>
Professional Development		
SPED Contract Services		Types of anticipated SPED Contractors:
Other Contract Services (i.e. accounting, HR, management)		
Office Supplies		
Membership Dues (if applicable)		
<b>OVERALL EDUCATION PROGRAM TOTAL</b>	<b>-</b>	
<b>2b: ELEMENTARY PROGRAM</b>	<b>Budget</b>	<b>Assumptions / Details / Sources</b>
Elementary Curriculum		
Elementary Instructional Supplies & Consumables		
Elementary Special Education Curricular Materials		
Elementary Contract Services (provide assumption)		Types of anticipated Contractors:
<b>ELEMENTARY PROGRAM TOTAL</b>	<b>-</b>	
<b>2c: SECONDARY PROGRAM</b>	<b>Budget</b>	<b>Assumptions / Details / Sources</b>
Secondary Curriculum		
Secondary Instructional Supplies & Consumables		
Secondary Special Education Curricular Materials		
Secondary Contract Services (provide assumptions)		Types of anticipated Contractors:
<b>SECONDARY PROGRAM TOTAL</b>	<b>-</b>	
<b>EDUCATIONAL PROGRAM TOTAL</b>	<b>-</b>	
Additional Notes or Details Regarding Educational Program Expenditures:		



Section 3: Technology		
Line Item / Account	Budget	Assumptions / Details / Sources
Internet Access		
Contract Services		
Technology Software & Licenses		
Computers for Staff Use		
Computers for Student Use		
Other Technology Hardware (i.e. document cameras, projectors, etc.)		
TECHNOLOGY TOTAL	-	
Additional Notes or Details Regarding Technology Expenditures:		

Section 4: Non-Facilities Capital Outlay		
Line Item / Account	Budget	Assumptions / Details / Sources
Furniture (school-wide)		Include only items not covered via FFE, if applicable.
Kitchen Equipment (warming oven, salad bar, etc)		
Other Capital Outlay (i.e. library, kitchen small wares, maintenance equipment, etc.)		
CAPITAL OUTLAY TOTAL	-	
Additional Notes or Details Regarding Non-Facilities Capital Outlay Expenditures:		

Section 5: Board of Directors		
Line Item / Account	Budget	Assumptions / Details / Sources
Board Training		
Legal		
Insurance (property, liability, E & O, etc.)		
Audit		
<b>BOARD OF DIRECTORS TOTAL</b>	-	
Additional Notes or Details regarding Board of Directors Expenditures:		

Section 6: Facilities Details (consistent with facilities template)		
Line Item / Account	Budget	Assumptions / Details / Sources
Mortgage or Lease		
Construction / Remodeling (if applicable)		
Repairs and Maintenance		
Facilities Maintenance Contracts (i.e. snow removal, lawn care, custodial, security, etc.)		
Utilities (i.e. gas, electric, water, etc.)		
Phone		
Other Facilities Related Costs (specify)		
<b>FACILITIES TOTAL</b>	-	
Additional Notes or Details Regarding Facilities Expenditures:		

Section 7: Transportation		
Line Item / Account	Budget	Assumptions / Details / Sources
Daily Transportation		
Special Transportation (i.e. SPED, field trips, etc.)		
Other Transportation Costs (specify)		
<b>TRANSPORTATION TOTAL</b>	<b>\$0.00</b>	
Additional Notes or Details Regarding Transportation Expenditures:		

Section 8: Nutrition		
Line Item / Account	Budget	Assumptions / Details / Sources
Food Costs		
Non-Food Costs		
<b>OTHER TOTAL</b>	<b>-</b>	
Additional Notes or Details Regarding Transportation Expenditures:		

Section 9: Other Expenditures		
Line Item / Account	Budget	Assumptions / Details / Sources
<b>OTHER TOTAL</b>	<b>-</b>	
Additional Notes or Details Regarding Transportation Expenditures:		

Idaho Public Charter School Commission Charter Petition: Operational Budgets					
<b>Worksheet Instructions:</b> list revenues, expenditures, and Full-Time Equivalencies (FTE) anticipated during the pre-operational year. Insert rows as necessary throughout the document. Include notes specific to start-up costs (details, sources, etc.) in the Assumptions column.					
Operational Revenue					
Anticipated Enrollment for Each Scenario:	0	0	0	0	
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Cash on Hand			NA	NA	Secured funds only; include documentation
Donations and Contributions					Secured funds only; include documentation
Loans					Include documentation for lender, term, rate, and total principal and interest.
Grants					Provide documentation and details.
Entitlement					Attach the M & O Revenue Template
Salary and Benefit Apportionment					Attach the M & O Revenue Template
Transportation Allowance					
Special Distributions	NA	NA	NA	NA	From the SDE Special Distributions Doc.
Charter School Facilities					Virtual schools include SDE worksheet
Content and Curriculum					
Continuous Improvement Plans and Training					
Gifted Talented					
Leadership Premiums					
IT Staffing					
Math and Science Requirement					
Professional Development					
Safe and Drug-Free Schools					
Technology (i.e. infrastructure)					
Advanced Opportunities					secondary schools only
College and Career Advisors/ Mentors					secondary schools only
Literacy Proficiency	NA	NA			
Limited English Proficient (LEP)	NA	NA			
School Facilities (Lottery)	NA	NA			
<b>REVENUE TOTAL</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	

**Operational Expenditures**

**Section 1: Staffing**

1a: CERTIFIED STAFF	Break-Even Year 1 Budget		Full Enrollment Year 1 Budget		Year 2 Budget		Year 3 Budget		Assumptions / Details / Sources
	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
Classroom Teachers									
Elementary Teachers									
Secondary Teachers									
Specialty Teachers									
Classroom Teacher Subtotals	0.00	-	0.00	-	0.00	-	0.00	-	Average classroom size:
Special Education									
SPED Director									
Special Education Teacher									
Special Education Subtotals	0.00	-	0.00	-	1.00	-	0.00	-	Anticipated % Special Education Students:
Other Certified Staff									
Lead Administrator									
Assistant Administrator									
Other Certified Staff Subtotals	0.00	-	0.00	-	0.00	-	0.00	-	
<b>CERTIFIED STAFF TOTAL</b>	<b>0.00</b>	<b>-</b>	<b>-</b>	<b>\$0.00</b>	<b>1.00</b>	<b>\$0.00</b>	<b>0.00</b>	<b>\$0.00</b>	

1b: CLASSIFIED STAFF	Break-Even Year 1 Budget		Full Enrollment Year 1 Budget		Year 2 Budget		Year 3 Budget		Assumptions / Details / Sources
	FTE	Amount	FTE	Amount	FTE	Amount	FTE	Amount	
Position									
Paraprofessionals- General									
Paraprofessionals- SPED									
Admin / Front Office Staff									
Other									
<b>CLASSIFIED STAFF TOTAL</b>	<b>0.00</b>	<b>-</b>	<b>0.00</b>	<b>-</b>	<b>0.00</b>	<b>-</b>	<b>0.00</b>	<b>-</b>	

1c: BENEFITS	Break-Even Year 1 Budget		Full Enrollment Year 1 Budget		Year 2 Budget		Year 3 Budget		Assumptions / Details / Sources
	Rate	Amount	Rate	Amount	Rate	Amount	Rate	Amount	
Type									
Retirement									
Workers comp/ FICA/ Medicare									
Group Insurance (Medical/Dental)									
Paid time off (provide assumptions)									
<b>BENEFITS TOTAL</b>		<b>-</b>		<b>-</b>		<b>-</b>		<b>-</b>	
<b>CERTIFIED &amp; CLASSIFIED STAFF TOTAL</b>		<b>-</b>		<b>-</b>		<b>\$0.00</b>		<b>\$0.00</b>	
<b>TOTAL STAFF &amp; BENEFITS TOTAL</b>		<b>-</b>		<b>-</b>		<b>\$0.00</b>		<b>\$0.00</b>	

Section 2: Educational Program					
2a: OVERALL EDUCATION PROGRAM COSTS	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Professional Development					
SPED Contract Services					Types of anticipated SPED Contractors:
Membership Dues					
Authorizer Fee					
Other Contract Services (i.e. accounting, HR, management)					Provide details
Office Supplies					
<b>OVERALL EDUCATION PROGRAM TOTAL</b>	-	-	-	-	

2b: ELEMENTARY PROGRAM	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Elementary Curriculum					
Elementary Instructional Supplies & Consumables					
Elementary Special Education Curricular Material					
Elementary Contract Services (provide assumption)					
<b>ELEMENTARY PROGRAM TOTAL</b>	-	-	-	-	

2c: SECONDARY PROGRAM	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Secondary Curriculum					
Secondary Instructional Supplies & Consumables					
Secondary Special Education Curricular Materials					
Secondary Contract Services (provide assumption)					Types of anticipated Contractors:
<b>SECONDARY PROGRAM TOTAL</b>	-	-	-	-	
<b>EDUCATIONAL PROGRAM TOTAL</b>	-	-	-	-	

Additional Notes or Details Regarding Educational Program Expenditures:

Section 3: Technology					
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Internet Access					
Contracted Services					Include details.
Technology Software & Licenses					
Computers for Staff Use					
Computers for Student Use					
Other Technology Hardware (i.e. document cameras, projectors, etc.)					
<b>TECHNOLOGY TOTAL</b>	-	-	-	-	
Additional Notes or Details Regarding Technology Expenditures:					

Section 4: Non-Facilities Capital Outlay					
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Furniture (school-wide)					
Kitchen Equipment (warming oven, salad bar, etc.)					
Other Capital Outlay (i.e. library, kitchen small wares, maintenance equipment, etc.)					
<b>CAPITAL OUTLAY TOTAL</b>	-	-	-	-	
Additional Notes or Details Regarding Non-Facilities Capital Outlay Expenditures:					

Section 5: Board of Directors					
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Board Training					
Legal					
Insurance (property, liability, E & O, etc.)					
Audit					
<b>BOARD OF DIRECTORS TOTALS</b>	-	-	-	-	
Additional Notes or Details Regarding Board of Directors Expenditures:					

Section 6: Facilities Details (consistent with facilities template)					
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Mortgage or Lease					
Construction / Remodeling (if applicable)					
Repairs and Maintenance					
Facilities Maintenance Contracts (i.e. snow removal; trash; lawn care, custodial, security, etc.)					
Utilities (i.e. gas, electric, water, etc.)					
Phone					
Other Facilities Related Costs (specify)					
<b>FACILITIES TOTAL</b>	-	-	-	-	
Additional Notes or Details Regarding Facilities Expenditures:					



Section 7: Transportation					
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Daily Transportation					
Special Transportation (i.e. SPED, field trips, etc)					
Other Transportation Costs (specify)					
<b>TRANSPORTATION TOTAL</b>	\$0.00	\$0.00	\$0.00	\$0.00	
Additional Notes or Details Regarding Transportation Expenditures:					

Section 8: Nutrition Program					
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
Food Costs					
Non-Food Costs					
<b>NUTRITION TOTAL</b>	-	-	-	-	
Additional Notes or Details Regarding Other Expenditures:					

Section 9: Other Expenditures					
Line Item / Account	Break-Even Year 1 Budget	Full Enrollment Year 1 Budget	Year 2 Budget	Year 3 Budget	Assumptions / Details / Sources
<b>OTHER TOTAL</b>	-	-	-	-	
Additional Notes or Details Regarding Other Expenditures:					



IDAHO PUBLIC CHARTER SCHOOL COMMISSION  
**PETITION FACILITY OPTIONS TEMPLATE**



Idaho Public Charter School Commission  
304 North 8<sup>th</sup> Street, Room 242  
Boise, Idaho 83702

Phone: (208) 332-1561  
[chartercommission.idaho.gov](http://chartercommission.idaho.gov)

Alan Reed, Chairman  
Tamara Baysinger, Director

New Charter Petition Facility Option 1						
Location Address						
Facility Information	Anticipate Move-In Date	Click or tap to enter a date.	Facility Type	Choose an item.	Facility Status	Choose an item.
Budget Location	Please indicate if this option is reflected as an expenditure in the budget template.  Note: A facility option may be true for only your first year with a different option in subsequent years, or a scaled-down option may be presented in the break-even budget only. Sometimes a facility option is presented as evidence that the petitioners have explored multiple facilities, but only one plan is reflected in the budget.				Year 1 Budget Only	
Vendor/ Developer/ Contractor Information (if applicable)	Company Name:					
	Physical Address of Home Office:					
	Website Address:					
	Company Contact:					
	Company Contact Phone Number:					

Additional Information - Facility Option 1
<p>Please include any information pertinent to Facility Option 1 that is not already included in Section II (Finance and Facilities Plan) of the petition. Include attachments referenced here or throughout the petition in Attachment F. Links in the final PDF are appreciated.</p>

Facility Option 1 - Details		
Please describe the costs involved with this option and the structure of any arrangements the school has made (or intends to make) in order to secure and sustain this facility option. Adjust descriptions and add columns as necessary.		
Description of Start-Up Costs	Cost Estimate (Refer to appropriate documentation in Attachments)	Responsible Party (Board or Name of Contractor)
Land purchase (if applicable)		
Land development (include grading, utilities, etc.)		
Parking, curb, lighting (if applicable)		
Permits and applicable studies (as applicable)		
Delivery and set up of modular units (if applicable)		
Remodel estimate (if applicable)		
Other		
<b>Total One-Time Costs</b>		
Description of Lease/Rent/Purchase Plan	Details (Refer to appropriate documentation in Attachments)	
<b>Annual Lease / Rent / Mortgage Payment</b>		
Lease term		
Interest rate		
Rate escalator (if applicable, please describe)		
In which operating year does the school intend to purchase (if option to purchase is applicable)	Choose an item.	
Capitalization rate at purchase (if applicable)		
Other		
Please include any additional narrative here.		

New Charter Petition Facility Option 2						
Location Address						
Facility Information	Anticipate Move-In Date	Click or tap to enter a date.	Facility Type	Choose an item.	Facility Status	Choose an item.
Budget Location	Please indicate if this option is reflected in the Budget Template (Attachment A1-A4)			Choose an item.		
Vendor/ Developer/ Contractor Information (if applicable)	Company Name:					
	Physical Address of Home Office:					
	Website Address:					
	Company Contact:					
	Company Contact Phone Number:					

Additional Information - Facility Option 2
<p>Please include any information pertinent to Facility Option 2 that is not already included in Section II (Finance and Facilities Plan) of the petition. Include attachments referenced here or throughout the petition in Attachment F. Links in the final PDF are appreciated.</p>

Facility Option 2 - Details		
Please describe the costs involved with this option and the structure of any arrangements the school has made (or intends to make) in order to secure and sustain this facility option. Adjust descriptions and add columns as necessary.		
Description of Start-Up Costs	Cost Estimate (Refer to appropriate documentation in Attachments)	Responsible Party (Board or Name of Contractor)
Land purchase (if applicable)		
Land development (include grading, utilities, etc.)		
Parking, curb, lighting (if applicable)		
Permits and applicable studies (as applicable)		
Delivery and set up of modular units (if applicable)		
Remodel estimate (if applicable)		
Other		
<b>Total One-Time Costs</b>		
Description of Lease/Rent/Purchase Plan	Details (Refer to appropriate documentation in Attachments)	
<b>Annual Lease / Rent / Mortgage Payment</b>		
Lease term		
Interest rate		
Rate escalator (if applicable, please describe)		
In which operating year does the school intend to purchase (if option to purchase is applicable)	Operating Year 2	
Capitalization rate at purchase (if applicable)		
Other		
Please include any additional narrative here.		



IDAHO PUBLIC CHARTER SCHOOL COMMISSION

# GUIDANCE: NEW CHARTER PETITIONS



Idaho Public Charter School Commission  
304 North 8<sup>th</sup> Street, Room 242  
Boise, Idaho 83702

Phone: (208) 332-1561  
[chartercommission.idaho.gov](http://chartercommission.idaho.gov)

Alan Reed, Chairman  
Tamara Baysinger, Director

UPDATED 7/22/2019



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## Welcome

Welcome to Idaho's public charter school sector. This guide is intended to give you tools for successful navigation of the charter petitioning process. We'll provide some basic information about public charter schools and an outline of the petitioning process, then focus primarily on recommendations for drafting your petition.

As you may be aware, public charter schools operate under a grant of authority from an authorized chartering entity, or authorizer. The majority of Idaho's public charter schools are authorized by the Public Charter School Commission (PCSC). Although this document reflects the priorities of the PCSC, it may also be used to support the efforts of petitioners seeking authorization by local school district boards or institutions of higher learning. However, you should be sure to check with your potential authorizer regarding any policies, processes, or requirements that may apply.

The PCSC's office, located in Boise, has a full-time staff that stands ready to assist you, should you choose to petition to the PCSC. We appreciate your interest in taking on this challenge and invite you to contact us anytime with questions or concerns.

## History & Structure

Idaho's original charter school legislation passed in 1998. At that time, only local school district boards could authorize public charter schools. This worked well for many schools, but in other cases, sufficient difficulty arose that the legislature identified a need for an alternative, independent authorizer. The Public Charter School Commission (PCSC) was created in 2004 to fulfill this role. The PCSC currently authorizes the majority of Idaho's public charter schools.

The PCSC's seven members hail from all around the state. Commissioners are appointed by the Governor (3 members), Senate Pro Tempore (2 members), or Speaker of the House (2 members). They serve four-year terms, and officers are elected every two years in the spring.

The PCSC is staffed by the Office of the State Board of Education.

## The Authorizer's Role

The PCSC's statutory role is one of oversight. We seek to fulfill this role with an attitude of service and look forward to working with you toward a mutual goal of providing Idaho's students with many diverse, high-quality schools of choice.

*The Public Charter School Commission's mission is to ensure PCSC-authorized public charter schools' compliance with Idaho statute, protecting student and public interests by balancing high standards of accountability with respect for the autonomy of public charter schools and implementing best authorizing practices to ensure the excellence of public charter school options available to Idaho families.*

In accordance with Idaho statute, the PCSC sets expectations for performance and holds schools accountable for results. We support schools’ autonomy by refraining from dictating their inputs or controlling their processes. Instead, we establish a consistent standard for performance outcomes while freeing schools to manage their operations as needed, within the bounds of the law, to meet or exceed that standard. We believe in the foundational concept that public charter schools exchange increased autonomy for increased accountability, and strive to uphold both sides of that equation.

The PCSC is responsible for prudent evaluation of new charter petitions, as well as the oversight of existing public charter schools’ academic, operational, and financial statuses. The bulk of our focus is on academic outcomes, but schools’ operational compliance and financial health are also important to ensure the protection of student and public interests.

During the petitioning phase, we will focus on your proposed school’s likelihood of success. This process involves thoughtful consideration of factors such as community need, market interest, financial resources, viability of the academic program, access to appropriate staffing, and capacity of your board of directors. The following sections provide guidance for presenting this information effectively in order to increase your opportunity for success.

## Petitioning Process

Idaho statute describes the process through which the PCSC may consider new charter petitions. We strongly advise that you take an hour or two to familiarize yourself with Idaho’s entire [charter school statute](#). The petitioning process is addressed specifically in [§33-5205](#), Idaho Code. Administrative rule and PCSC policy provide additional structure.

The next page offers a summary of the petitioning process. Be sure to take note of all timelines and deadlines so that you don’t encounter unnecessary delays.

Deadline	Task	Notes
None	Write your petition	Statute provides a list of four areas that petitions must address (more for proposed virtual schools). Administrative rule provides additional direction. This guide is designed to offer additional assistance.
None	Submit completed petition and letter(s) to local school district superintendents	Your letter(s) should notify the school district(s) overlapped by your proposed attendance area that you are seeking an authorizer. The district(s) cannot deny or delay your petition, but they may ask you to attend a meeting to discuss the matter.
4 weeks after letter/petition submitted to district,	Submit your petition to the PCSC office	It is possible, by mutual agreement with the district superintendent(s), to submit your petition to the PCSC before 4 weeks have passed.

AND By Sept. 1		Statute allows authorizers to receive petitions later than September 1 by mutual agreement, but missing this deadline may make it difficult to meet the non-negotiable January 1 deadline below, so exceptions to the deadline are rare.
Within 12 weeks	The PCSC office will notify you of your hearing date and recommendation to the PCSC	<p>During this 12 weeks, PCSC staff will provide an initial review of your petition and offer you an opportunity to make revisions.</p> <p>PCSC staff will conduct a board capacity interview during this period. Please see the Board Governance Resources section of the PCSC website for more information.</p> <p>Revisions must be received at least 30 days prior to the end of the 12-week review period. They must also be received at least 30 days prior to the regular PCSC meeting at which your petition will be considered. Exact timelines are unique to each petition, but don't worry - we'll walk you through it.</p> <p>After any requested revisions are received, we will notify you of your hearing date. We will also advise you of PCSC staff's recommendation (deny, approve, or conditionally approve) so you may best prepare for your hearing.</p>
None	PCSC hearing	<p>Your petition will be heard at the earliest regular PCSC meeting that allows time for appropriate review and revision of the petition.</p> <p>At the hearing, the PCSC may approve, conditionally approve, or deny your petition. There is no option for delaying a decision, so you'll want to be sure the PCSC sees your very best work at this time.</p>
By Jan. 1	Petition must be approved in order to open the following fall	The PCSC typically holds its last regular meeting of the year on the second Thursday in December, so be sure your petition is prepared in time for inclusion on that agenda in order to meet the January 1 approval cutoff.

**Formatting & Submission**

Your petition includes two sections: the petition narrative plus a set of appendices. The narrative and the appendices may be submitted in one PDF. However, if the file is too large, it may be submitted in two separate PDFs. Please note that all budgets should be both embedded in the PDF and also submitted separately in the PCSC MS Excel template.

Bear in mind that your petition represents a request for a grant of authority to manage large sums of taxpayer funds and children's educational futures. Take care to present yourself professionally through clear writing, accurate budgets, and thorough proofreading.

Before submitting your documents, check for any pages where information may have accidentally been cut off. (This is especially common when Excel files are converted to PDF.) Also ensure that your table of contents is accurate, page numbers are visible, and any hyperlinks are functional. In PDF documents, bookmarks are extremely helpful for navigation.

Your petition, and particularly the appendices, may be large enough that emailing the documents is impractical. Feel free to deliver them to our office on a flash drive or send them via the free, online file sharing system Dropbox.

If you aren't familiar with hyperlinking, bookmarking, or use of Dropbox, you are welcome to contact the PCSC office for a quick tutorial.

Please note that when you receive PCSC staff feedback on the first draft of your petition, you will have the opportunity to revise and resubmit. When making edits to your petition, with the exception of changes to the PCSC budget and facilities templates, please use legislative formatting. See [The Idaho Rule Writer's Manual](#), section II.4, pg. 36, for instructions in the proper use of legislative format. Please do not use "track changes" or the "show markup" feature in Microsoft Word as a substitute for legislative formatting. For more information, see PCSC Policy Section II.B, which contains additional requirements related to the submission of petitions and petition and revisions.

## Petition Narrative

New charter petitioners often want to know what information should be included in their petitions, and to what level of detail. While every petition is unique, the guidance that follows is designed to help you understand what the PCSC will need to know in order to make a well-informed authorizing decision.

A Standards of Quality document provides more specific guidance for each section of your petition.

Statute requires that you describe the following in your charter petition:

1. Educational program, including academic proficiency and growth standards and measurement methods and any mission-specific standards that may be unique to the school.
2. Financial and facilities plan.
3. Board capacity and governance structure.
4. Student demand and primary attendance area.
5. School leadership and management.
6. For virtual schools, additional elements are required. The PCSC also requires that these elements be included in proposals for blended programs.

Administrative rule elaborates on these categories, providing additional detail regarding the required contents of your charter petition. Each of these requirements, along with some

PCSC recommendations and lists of required supporting documentation, is detailed in the following pages.

We encourage you to spend plenty of time thinking through each section of your developing petition. Hold discussions with your founding group. Do the necessary research and tap experts as needed for advice. Gather documentation to support your financial and facilities plans. Write and edit carefully, then wrap up with a final check to be sure you have addressed all the suggestions and requirements provided below.

## Introduction

### Cover Page

Please include the following on the first page of your petition, for easy reference:

- Name of Proposed School
- Proposed Opening Year
- General Location (This may be a school district, city, or county rather than a specific address.)
- Contact Information (For primary liaison between PCSC staff and your petitioning group. If this is employee or contractor, please include contact information for your board chair as well. Name, mailing address, daytime phone, and email are important.)

### Table of Contents

Please verify that you have included accurate page numbers. Hyperlinks or bookmarks are especially helpful.

### Executive Summary

Take one page to introduce your proposed school to the PCSC. Provide a succinct description of your proposed organizational structure, educational program and the community need it is intended to meet, and the academic outcomes you expect it to achieve. Remember to keep it brief and to the point; you'll flesh out the details later.

### Mission Statement

Good mission statements are easy to read, but often challenging to write, so plan on putting some careful thought into this section. Ultimately, your mission statement should convey, in just a sentence or two, the following:

- What your school does (example: Provides an exceptional academic foundation to students in grades 9-12),
- How your school does it (example: through the implementation of a research-based, experiential learning STEM program),
- And why (example: in order to expand future career options for demographically diverse students in our low-income community).

Be sure that your mission can be implemented upon the school's opening, not a goal you intend to reach after several years of operation.

You may also choose to include an optional vision statement or a set of core values. These may be included in the executive summary page and should be separate from the mission statement. Vision statements project the impact your school will have over time. Core values are shared beliefs that guide decision-making. The following are examples of a vision statement and core values:

- Vision: Our students will be prepared to lead successful lives as part of a larger community.
- Core Values: Honesty, Hard Work, and Kindness

## Educational Program

Statute requires that your petition provide a description of your educational program, including academic proficiency and growth standards, measurement methods, and any mission-specific standards that may be unique to the school. This section represents the bulk of your petition narrative and should clearly describe how education will take place at your school, and what outcomes you expect as a result.

Many petitioners struggle to find the right balance between thoroughness and concision. It is important to explain your ideas so that they may be understood by individuals who are unfamiliar with your proposal, but avoid being too verbose or repetitive. It often helps to recruit a skilled editor (ideally, one who is not well-versed in your educational program) to review your draft and offer suggestions.

### Description of Educational Philosophy

Here's your chance to describe the heart of your school: its educational philosophy. What do you, as a founding board, believe is critical to a successful education? Think of the description of the educational philosophy as the big picture and provide more details about the model in the key design elements and curriculum section described below.

Provide research to support the proposed educational philosophy and academic model. When citing research, it is best to offer hyperlinks or refer readers to the appendices, rather than copying and pasting at length. Speaking of copying and pasting, be sure to avoid plagiarism. We want to hear about your academic program in your own words.

### Student Academic Achievement Standards

This is where the rubber meets the road. The most well-defined educational model is only worthwhile if students actually learn. That said, success can look very different from one school to another, depending on the goals identified and students served.

Think about your anticipated student demographic and how your proposed educational program will serve them. What academic proficiency level do you expect your students to achieve? How much academic growth should they show? Do you have any student outcome

goals that are specific to your school’s mission? What measurement tools will you use to evaluate proficiency, growth, and any mission-specific data?

Create a bullet-point list to describe, in concrete terms, the outcomes you expect to result from your program. Perhaps you expect 90% of your young readers, most of whom came to you with a history of low achievement, to be proficient in reading by the end of third grade. Maybe you anticipate that the students at your STEM school will show 20% more year-over-year growth in math than a comparison group. Or maybe you plan to ensure an 80% graduation rate among your alternative population, even if some kids take an extra year or two to earn their required credits.

In addition to specific, measurable academic outcomes, it is also appropriate to include some “soft” targets (such as decreased bullying or increased student engagement) in this section.

#### Description of Key Design Elements, Curricula, Tools and Instructional Methods

This section asks you to describe how your educational philosophy looks when applied in the classroom, covering the nuts and bolts of your proposed academic program.

What are the key design elements of your educational program, without which your school wouldn’t be true to your founding vision? Key design elements are a few, straightforward sentences that highlight the unique aspects of your program. Think of it as your “elevator pitch” that provides a quick summary of the defining features of your school. Should your petition be approved, your key design elements will be included in your performance certificate, the legal document that outlines what your school promises to deliver.

Tell us more about your academic model. Some charter petitioners wish to implement an established model, such as Expeditionary Learning, Montessori, or Classical Education. If this is the case for you, consider spending a page or two describing the model. Then, focus primarily on how you will implement the model with fidelity. Consider also how you will ensure that the model meets state and federal requirements, such as Common Core.

If your model includes the use of an Education Service Provider (ESP) - also known as a Charter Management Organization (CMO) or Educational Management Organization (EMO) - be sure to address your rationale for selecting the particular ESP. What makes it the best solution for an identified need? Describe your expectations and plan for regular evaluation of the ESP.

It is not uncommon for petitioners to propose an educational model that is “based on” or “similar to” an established model. In such cases, it is critical that you explain in exactly what ways your school will adhere to, and differ from, the established model. Why is your variation preferable to the established model? Will you have access to tools (ranging from professional development to curriculum) specific to the model? While it may seem easier or cheaper to imitate or approximate an established model rather than implementing it fully, the reality is that schools taking this route often struggle with low academic outcomes or mission drift down the road. Proceed with caution and expect a lot of questions from the PCSC.



Some petitioners wish to propose new educational models, perhaps based on various studies or their own observations. If you fall into this category, be sure to explain your model thoroughly, bearing in mind that your reader won't have any prior information around which to build a mental image of your proposal. Consider instructional style, classroom organization, school culture, behavioral expectations, subject-area focus, and any other relevant factors. Explain what you want to do and why you believe it will work, citing as much research and/or experiential evidence as possible.

Some petitioning groups have already identified the curricular materials they plan to purchase. Others prefer to wait on these selections until they have hired an administrator. If you fall into the latter category, include a description of specific characteristics you'll be looking for in your curriculum choices.

### Strategies for Effectively Serving Special Populations

Public charter schools are exactly that: public. While the number of students enrolled may be limited, students cannot be selected based on factors such as academic prowess, athletic ability, socioeconomic status, or special needs. Public charter schools must serve any student who wishes to attend, up to the enrollment capacity of the school, and provide services just like any other public school.

Rather than simply citing or quoting your legal obligations, really think through how your program will offer a continuum of services for all students, including those who have special needs, are at-risk, are gifted and talented, or are English language learners. If your school specifically targets a certain demographic, be sure to explain how your support system is particularly well designed to meet their needs.

Use this section to describe specific strategies your school will employ to ensure that all students feel welcome, supported, and fully served by your program. Be sure that the narrative and the budget are aligned. Here are some questions to consider while you draft this section:

- How will student identification programs such as Child Find and Response to Intervention work within the scope of your educational program?
- How will your facilities meet the needs of students receiving special services? Have you planned for provision of pull-out rooms, group instruction space, computer/science labs, sensory control space, storage for files and materials, etc.?
- What purchases are necessary for successful implementation of your educational model for all students? Consider modified curriculum, accommodated seating options, special software, and adaptive technology.
- How will you staff programs such as 504, special education, ELL, and gifted and talented? Particularly if your proposed school is small or rural, it may prove

- challenging to recruit personnel. Can you find individuals who are able to wear multiple hats?
- How will you develop and maintain a culture of high expectations, emphasizing every student’s personal growth?
  - How will you engage families in the process of their child’s learning? Be sure to consider families’ work schedules and comfort level in the education environment.
  - How will you ensure that your communication systems and policies meet the needs of all families? Think about potential obstacles such as language barriers and limited access to technology.
  - How will you address the specific needs of low-income students, such as transportation and nutrition?

If you need specifics about your legal obligations, the State Department of Education (SDE) has experts who can assist. Furthermore, several departments at the SDE, provide program manuals regarding various special services. PCSC staff or the SDE’s School Choice Coordinator can point you in the right direction to learn more.

### Professional Development Plan

Most public charter schools offer a program that is different from those available at other area schools. You may be hiring numerous teachers, and possibly even an administrator, with little or no training in your educational model. As you might imagine, a cohesive professional development plan is critical to success.

Consider what resources will be important for your educators, and how they can be affordably accessed in a constructive and meaningful way. Can your teachers shadow colleagues at similar schools? Are workshops available? Will experts be brought in before school opens, and for follow-up seminars thereafter? Could web-based courses be used as a basis for regular training throughout the year? How can application of your model be built into regular teacher and administrator evaluations? What professional development options will be most effective and affordable? Describe your plan - including specific training tools whenever possible - in a few paragraphs, including hyperlinks as appropriate.

### Financial and Facilities Plan

Public charter schools offer different opportunities than traditional public schools. Arguably, they do so on a tighter budget. It follows that most public charter schools must choose their spending priorities carefully, and make wise financial decisions, in order to fulfill both their missions and their legal obligations.

Before you write this section, set aside some time for your board to talk about money. (We know, it’s not as scintillating as discussing the educational program. But if you can’t stay afloat financially, you won’t have an educational program, so bite the bullet and have those hard conversations.)

### Fiscal Philosophy and Spending Priorities

How do you, as a board, think about your financial obligations, particularly since charters rely primarily on taxpayer dollars? What level of understanding do you believe is important to maintain regarding the school's finances? How will you ensure you have access to the appropriate expertise for preparation (by staff) and interpretation (by your board) of financial records? How confident are you in your budget projections? Are they conservative or optimistic in nature? What are your fixed costs, and what expenditures could be adjusted if enrollment numbers come in lower than anticipated? What are your must-haves for successful implementation of your educational program, and what can you live without? Do you have a clear understanding of how public schools are funded? (If not, be sure to ask PCSC and SDE staff for help.)

It isn't necessary to answer all of the questions above in your petition, but you should use them as a starting place for discussion. Boil down your board's collective thoughts to a paragraph describing your fiscal philosophy and spending priorities.

Next, be sure to address the following, required information:

### Transportation and Food Service Plans

While Idaho statute does not absolutely require public charter schools to provide transportation and nutritional services to students, many choose to do so in order to ensure their programs are available to all students. This can both promote diversity and reduce attrition.

Your petition should clearly state whether you intend to provide student transportation and/or nutrition. If you will offer these services, describe your plans for doing so. Be sure the details are supported by your budget and relevant documentation in your appendices.

### Financial Management and Monitoring Plan

It is important to have clarity regarding the different roles of the school's board and its employees with regard to financial management. In a few paragraphs, explain the nuts and bolts of how your school's finances will be managed.

Describe what tasks will be performed by staff and specify what those staff positions will be. (Most schools employ a full- or part-time business manager.)

Be sure to think about how the school's fiscal policies will address budgeting, processing and monitoring of revenue and expenses, cash flow management, and internal controls. Also plan for how you will develop the school's annual budget, making sure to identify roles, timelines, and the budget amendment process. (This can be addressed at a relatively high level in the petition, but keep in mind that this is an area in which many operational schools struggle.)

Note which fiscal reports your board expects to review monthly, quarterly, and annually. Identify the key status indicators your board will examine on a regular basis. Explain how you will ensure that board members have the necessary knowledge to oversee the school's finances and how you will ensure proper fiscal oversight.

## Facilities Plan

Ideally, a charter school’s facility is both affordable and reflective of the nature of the educational program. This section of your petition should describe a realistic vision for your facility.

Consider your proposed enrollment and growth plan, class sizes and course offerings, and the nature of your educational program. How much square footage will you need? Will any special features, such as a dance studio or garden space, be required? Does it need to be in a particular area of town in order to ensure access by your target demographic? How much can you afford to spend on a facility, and will that amount cover the necessities you’ve identified?

The financial details of your facility plan, complete with documentation demonstrating that they are realistic, will be covered in your appendices. Here, simply take a paragraph or two to describe the type of facility that your proposed school will need and can afford.

## Board Capacity and Governance Structure

It is difficult to overstate how important a competent, trained governing board is to the success of a public charter school. This section of your petition should provide a clear picture of your founding board, as well as your plans for ensuring that your school maintains an effective governing board in years to come.

### Description of Governance Structure

A strong governing board is one that understands its own role and responsibilities, and can clearly differentiate these from the roles and responsibilities of the school’s administrative team. Take some time to clarify your thoughts regarding your school’s governance and management structure. Educate yourself on the difference between governance and management. (It’s a great way to shut down power struggles before they start.) Describe your proposed structure in a few paragraphs.

In your appendices, you’ll include a chart that defines the roles and responsibilities of the board, administrator(s), and other key figures, such as ESP personnel. You’ll be able to refer back to this when crafting job descriptions, refining management contracts, making hiring decisions, and performing evaluations.

### Board Member Qualifications

Starting a new school is no small feat. Take a paragraph or two to summarize the capacity of your founding board to accomplish the task. What skill sets are represented, and how are you leveraging them toward your petition’s success? Are all your board members engaged, or is one person bearing most of the load? Can you identify any skills gaps that should be filled by additional members, or perhaps by acquiring training in specific areas?

### Transition Plan

The ongoing work of your governing board will differ substantially from that of your founding board. It is possible that some of your most dynamic founders are better suited to the startup role than to ongoing governance. (“Founders Syndrome” is a common

phenomenon at new charter schools. It occurs when a founder can't let go of the day-to-day work of operating the school, and instead causes damage by attempting to micromanage the administrator, or even teachers. Don't let this happen to you!) On the other hand, founders can be critical to ensuring faithful implementation of the stated mission during the early life of the school.

As a board, have a frank discussion about which members plan to move on and which will stay after the school is operating. In your petition, include a paragraph that describes your board's plan for a smooth transition from founding to governing. Consider whether any skills sets will need to be added or changed. If some members of the founding board are likely to resign from the board in order to seek employment at the school, be sure to note how you will ensure that the remaining membership reflects a strong capacity to govern. Identify potential pitfalls and strategize to avoid them.

### Board Member Recruitment and Training

Effective board membership is a skill in and of itself. The best boards are comprised of individuals who understand the board's role and operate within that role. They are clear-eyed about which responsibilities to take on and which to delegate. Additionally, they perform regular self-evaluations that help them identify areas for self-improvement, and they access quality training in order to improve.

In your petition, describe your plan for ensuring that all your board members participate in ongoing board training. PCSC staff can help guide you to opportunities for in-person training; you may also look into books or web-based resources. Consider developing a new member onboarding protocol, and be sure you don't neglect the continued learning of longtime members. Identify specific areas in which all board members should have competency (such as reviewing financial statements) and discuss what tools you will employ to build your board's knowledge base. Be sure any relevant expenses are reflected in your budget.

Additionally, bear in mind that many charter schools struggle to recruit new board members. You'll want to start early - months or years ahead of time - in grooming potential candidates. Include a paragraph describing your recruitment plan.

### Student Demand and Primary Attendance Area

It's especially important to be realistic when drafting this section of your petition. Many new charter schools, especially those located in rural areas and/or serving grades 6 and up, struggle to enroll as many students as they anticipated. Because your school's financial survival will depend upon adequate enrollment, the level of market interest in your idea should be clearly established. Additionally, your primary attendance area will impact a variety of factors, such as your student demographic, transportation expenses, and perhaps your relationship with local school districts.

## Primary Attendance Area

Statute requires that public charter schools define a primary attendance area, the main purpose of which is to identify students who are eligible for the relevant preference in your enrollment lottery. Students who live outside your primary attendance area may still request enrollment, but they'll receive a lower lottery preference than students who live inside the primary attendance area.

Your primary attendance area must be compact and contiguous. Basically, this means that you can't pick and choose certain neighborhoods in order to influence your student demographic. To the contrary, you should make every effort to ensure that enrollment at your school is demographically representative of its surrounding population.

Many public charter schools have primary attendance areas whose borders match those of the surrounding school district. Some encompass two or more complete districts, and others include parts of multiple districts. Be sure to list in your petition all districts that overlap your primary attendance area, and remember that you must notify them of your intentions before submitting your petition to the PCSC.

As you select your primary attendance area, bear the following in mind:

- It is best to plan on providing transportation to students who reside within your primary attendance area, but the state will only reimburse you for transportation within a certain radius of your school. This could make a large primary attendance area too expensive to manage.
- Your school facility must be located within the primary attendance area, so make sure that appropriate real estate is available and affordable.
- Most families want their children to attend school fairly close to home, so select a primary attendance area whose student population is large enough - and sufficiently interested in your educational program - to support adequate enrollment.
- If you select a primary attendance area whose borders are not pre-defined (such as by a school district), you'll need to be extremely specific in defining the area. Plan to use language such as "the west side of First Street" in order to avoid future disputes about enrollment preferences. Avoid simply using a "five mile radius around the school" definition, as this has a way of cutting properties in half and causing confusion.

Once you have defined your primary attendance area boundaries, do some additional research on the area. Demographics (including socioeconomic and racial diversity), school choices currently available, population trends, and similar information should be included.

## Student Demand

This section represents an opportunity for you to explain the benefits your proposed school will bring to your community. Describe why your area needs and demands this particular public charter school. Although only a few paragraphs are necessary, they should represent extensive research on your part.

In administrative rule, “need” is defined as the reasons(s) existing schools are insufficient or inadequate. Be sure to include student academic performance data in your discussion. “Demand” is defined as evidence of desire from prospective families to attend the school. Explain why you believe enough families will be interested in enrollment to sustain the school financially.

Do your homework and provide as much concrete data as possible. It is critical that you demonstrate to the PCSC that your proposed enrollment numbers (and the budget that relies upon them) are realistic. You don’t want to struggle financially, or even close your doors, due to under enrollment down the road. This is the time to let your inner skeptic have a voice. Estimate conservatively.

Network with community members and survey their interests. Shoot for having at least twice as many interested students as classroom seats to enroll.

### Student Population

This section should describe your intended student population and explain how you will serve those students on a practical level. Will your school be located in an area appropriate to attract the students you plan to serve? How many students do you anticipate will require special services? Are your staffing plan and educational program consistent with your intended demographic?

### Enrollment Capacity

Your petition should clearly describe the enrollment capacity of your school, both overall and by grade level. This section does not need to be long, but it should cover the following:

- Grade levels you intend to serve.
- Total enrollment capacity of the school.
- Exact, per-grade enrollment capacity. (This is necessary for purposes of the enrollment lottery, even if you intend to offer mixed-age classrooms.)
- Growth projection for at least five years, if applicable.

If you plan to expand over time, that information may be best provided in chart form. For example, this hypothetical school plans to increase both the number of classrooms per grade and the range of grades served over its initial ten years of operation:

Grades	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
K	25	50	50	50	50	50	50	50	50	50
1	25	25	50	50	50	50	50	50	50	50
2	25	25	25	50	50	50	50	50	50	50
3	25	25	25	25	50	50	50	50	50	50
4	25	25	25	25	25	50	50	50	50	50
5	25	25	25	25	25	25	50	50	50	50
6	25	25	25	25	25	25	25	50	50	50
7		25	25	25	25	25	25	25	50	50



<b>8</b>			25	25	52	25	25	25	25	50
<b>Total</b>	175	225	275	300	325	350	375	400	425	450

**Community Partnerships and Local Support**

Many public charter schools enjoy symbiotic relationships with other entities in their communities. Have you developed relationships with the Boys and Girls Club, YMCA, cultural organizations, science or athletic clubs, or other groups? Do you have supportive connections within the local school district or local government? In your petition, describe any community partnerships or other local support for your proposed school.

**Enrolling Underserved Families**

Demographic diversity is a weak point in Idaho’s public charter school sector, and one that the PCSC is excited to work with new charter petitioners to improve. We are looking for petitions that contain strong plans intended to ensure that the resulting schools enroll diverse student populations.

As a board, spend some time discussing how you can make your entire community aware of enrollment opportunities at your school. Think about racial, cultural, and socioeconomic diversity, at-risk students, English language learners, and students with special needs. Reach out to community groups who can help you strategize about how best to reach different markets. Plan to have enrollment materials published in languages reflective of the demographics of your primary attendance area. Be sure you can share with families how you’ll meet diverse student needs. Consider the practical aspects of access to your school, such as transportation and nutrition programs.

In your petition, include a few paragraphs that describe your strategies for ensuring all families are not only aware of enrollment opportunities, but also feel welcome and confident that quality services will be provided.

**School Leadership and Management**

**Leadership Team**

This section should describe the intended leadership structure of your school. Consider how leadership roles, from governing board to administrator, differ from one another. Define the school leader positions you intend to fill, making sure to identify who will report to whom, and include a school leader evaluation plan.

**Educational Services Provider**

If your school has chosen to work with an Educational Service Provider (ESP), please use this section to describe the services that entity will provide. Be sure to include the following information:



- Description of the ESP, including corporation name, any DBAs, corporate status, time in operation, number and location of schools managed and for how long, etc;
- Academic, operational, and financial performance outcome data regarding schools managed by the ESP;
- The intended role of the ESP at your proposed school; and
- How your board will regularly evaluate the ESP's performance.

## Virtual and Blended Programs

Technology provides interesting, new opportunities for educational programs. If your proposed school will be virtual (also known as online or cyber) or blended (incorporating substantial use of internet-based learning in combination with on-site instruction), you'll need to include a section of your petition that provides additional detail in the following areas:

### Learning Management System

This section should explain, on a practical level, how you will deliver educational materials via the internet. What technology platform and curricular materials will you use?

Will you engage a management company whose role is broader than curriculum provision, or perhaps develop your own platform in-house? If the former, clearly define the role of the management company. If the latter, describe your capacity to build and maintain the necessary technology.

Be sure to investigate the track record of any curriculum or management company you are considering using. How are students who have been through their courses performing on normed assessments? Are other schools that use their programs getting good results relative to the demographics they serve? Do they retain students over the long term, or is enrollment turnover high?

### Educational Program-Virtual and Blended

Describe how your school will offer a new, high-quality opportunity for families. Bear in mind that Idaho already has a variety of virtual education options for both full- and part-time enrollment, and overall enrollment in virtual charter schools has been on a gradual decline. Additionally, research at the national level raises questions about the academic effectiveness of virtual schools; less is known about the long-term impact of blended programs.

Consider the following: Why does a virtual or blended program represent the best way to fulfill your mission? What student demographic do you anticipate enrolling? What opportunity does your school offer that existing virtual or blended options do not? How will you ensure that students achieve better results at your school than they likely would have if enrolled in a more traditional option?

Explain how your teachers will interact with students through the learning management system and any other means. What is the role of an online teacher? How will your teachers

deliver course material and individualize instruction for particular students? How will they assess student work and provide timely, frequent feedback regarding student progress?

Consider who will do most of the teaching at your school: Is it the teacher, the parent, or the technology? How can you leverage your teachers' expertise to maximize student learning?

Many virtual school students report rich social lives despite the fact that they don't attend school in a brick-and-mortar classroom. Explain how you will encourage this experience within your school community. Include a plan for providing school-sponsored opportunities for students to interact with one another.

### Technology

We all love technology...when it works. Unfortunately, the opportunity for technical difficulties to arise is amplified at virtual and blended schools. Describe your plan for providing technical support for teachers, students, and families. Be sure to consider how new enrollees will be introduced to the online learning platform and correspondence pathways.

Additionally, discuss how you will ensure that your school is accessible to all students, including those with special needs and English language learners. How will special services, such as speech therapy, be delivered? How will you provide the necessary hardware, software, and internet connectivity required for participation in online coursework?

### Professional Development

Many teachers enjoy providing online instruction, but doing so may represent a skill set they have not had an opportunity to develop through prior experience. Describe your plan for ensuring that your teachers are well-prepared for both the practical and interpersonal aspects of providing a virtual education. Additionally, address how teacher evaluations will reflect implementation of strategies specific to the virtual environment.

### Data Collection/Attendance and Course Credit

Virtual schools must meet the same attendance requirements as other public schools, but they face unique challenges regarding the verification of student attendance. Consider how you will report Average Daily Attendance (ADA) and award course credit. Additionally, address how you will ensure that student work is being completed by the student himself or herself, and that he or she is actively engaged with the material while logged in.

Also, be sure to discuss your practical plan for ensuring student participation in state-mandated tests. What facilities will be used, and how will the necessary technology be provided? Related expenses should appear in your budget.

## Appendices

Your appendices should comprise a set of documents that support and expand upon the information in your petition narrative. Be sure to submit the appendices in a single PDF document, with electronic bookmarks to facilitate easy navigation. Please label each appendix as it is listed below. If you need to include additional appendices, feel free to add them to the end. (Just bear in mind that the document will already be quite long, so you should be judicious in your selections.)

### Appendix A: Budgets and Facilities Options

Your budgets will be one of the most carefully examined elements of your petition. We recommend that you spend extensive time on their development. Enlist the help of qualified individuals who understand Idaho public school funding. Consider asking the business manager of a financially stable charter school to weigh in, and seek support from the SDE or Idaho Charter School Network. PCSC staff will provide feedback upon our initial review of the petition in order to guide you toward any necessary improvements.

The PCSC provides templates to help you develop thorough budgets. You may access these online [here](#) (click on “PCSC Petition Budget Template” to download the Excel file). Before you begin, be sure to read the guidelines provided [here](#).

Facility plans are closely related to budgets, and securing an appropriate, affordable facility is often one of the most challenging steps toward opening a public charter school. Negotiating, permitting, and building or remodeling can be time-consuming and expensive. Even for portable classrooms, site preparation and installation can represent a significant practical and financial hurdle. Additionally, facility deals sometimes fall through, leaving nascent schools in the lurch as opening day looms. For these reasons, the PCSC requires most petitioners to provide at least two, realistic facility options. (Exceptions may be made when the group has a guaranteed facility already secured.)

The PCSC provides a template to help you identify, organize, and present information about your facility option(s). The template is available online [here](#) (click on Facility Options to download the Word file). Use the narrative section of the template to describe the facility plan and provide contextual details explaining the supporting documentation that you will include in Appendix F.

In this appendix, be sure to provide the following:

- Appendix A1: Financial Summary (Use Financial Summary tab in template provided by PCSC)
- Appendix A2: Pre-Opening Budget (Use Pre-Opening tab in template provided by PCSC)
- Appendix A3: Three-Year Operating Budget and Break-Even Year 1 Scenario (Use Operational Budgets tab in template provided by PCSC)
- Appendix A4: Cash Flow Projection for Initial Operating Year (Use Cash Flow tab in the template provided by PCSC)
- Appendix A5: Facility Options (Include a completed copy of the template for each of your facility options. Remember that most petitioners must provide two or more options.)

Be sure to fill out the templates completely. Ensure that the information they contain is consistent with both your petition narrative and the estimates, contracts, and other supporting documentation in Appendix F.

Since the break-even budget can be particularly confusing, please refer to the guidance below when completing this section of the budget template.

The purpose of a break-even budget is to determine the lowest student enrollment required to cover the necessary operational and programmatic expenses. Before creating the break-even budget, complete your three-year budgets based on the assumption that you'll achieve your anticipated enrollment goals. This will provide a baseline budget.

Then, beginning with the “year 1 full enrollment” budget numbers, adjust revenue and expenditure line items down until the net balance for the year is zero. This is your break-even budget that reflects your minimum enrollment to remain financially viable.

Even at break-even, your budget must support your proposed program. A good break-even budget considers that some expenses are fixed (such as administrative salaries and utilities) while others are variable based on the number of students enrolled (such as curriculum and technology purchases). It also considers whether purchases proposed in a full-enrollment situation may be cut or delayed without harming the overall success of the program. For example, an expensive equipment purchase may not be crucial in year one, and could be delayed to year three when enrollment numbers are up. On the other hand, a STEM program will not be able to provide the promised educational program if the technology budget is cut too deeply.

Words of caution: A budget plan that achieves break-even by cutting positions, programs, or equipment necessary to provide the program as described in the petition may not be a viable plan. Likewise, a budget that relies on enrollment goals that are significantly higher than local trends in order to achieve a functional break-even budget may be inviable. Finally, a budget that relies on unsecured funds (such as a fundraiser that hasn't taken place, or equipment promised by a company, but not yet received) may not be viable.

## Appendix B: Articles of Incorporation and Bylaws

As you know from reading Idaho’s charter school statute (you did read it, didn’t you?), public charter schools are organized and managed as non-profit corporations. This means that you should have filed Articles of Incorporation with the Secretary of State’s office. Include a copy of those Articles (and any amendments thereto) with your petition. Before you do, take note of the following:

- Check how your Articles describe the purpose of your corporation, which should exist for “educational purposes.”
- In the section regarding disposal of assets, make sure your language is compliant with §33-5212(2), Idaho Code. It’s different from the boilerplate language common in Articles for nonprofits. Note that assets purchased using federal funds need to be disposed of differently than other assets.
- If your school will have a different name than the corporation, you’ll need to file a Certificate of Assumed Business Name.
- Make sure your non-profit corporation exists only to operate the public charter school (or schools). Statute prohibits the operation of other enterprises under the same corporation.
- Be sure your Articles, and any amendments thereto, are signed by your board chair and stamped by the Secretary of State’s office.

Note that the list above does not comprise a complete description of Articles contents; it only addresses some of the most common errors made by charter petitioners. Work with your attorney to ensure that your Articles are thorough and appropriate.

Writing the Bylaws for your corporation may not be exciting, but doing it well can save you a lot of hassle down the road, especially if disputes arise. Before adopting your Bylaws and including a signed copy in your petition, enlist the help of an attorney and think through the following:

- Check the items under “Articles of Incorporation” above, and make sure your Bylaws match up.
- Clearly establish these details regarding your board of directors:
  - Minimum and maximum number of members.
  - Length of membership terms. In the beginning, it is wise to stagger term lengths so you don’t run the risk of all your board members turning over at once. Name the seats “Seat A,” “Seat B,” etc. and assign term lengths to them. Keep track of which member fills which seat in order to avoid confusion as turnover occurs.
  - Term limits, if any.
  - Selection of board members. Is your board self-appointing, voted upon by stakeholders, or a combination of the two? How will

- o nominations be taken? Who can vote, and through what method? When will elections be held? How will mid-term vacancies be filled?
- o Removal of board members. Consider resignation, incapacitation, death, and removal by the board and/or stakeholders.
- o Identification and duties of officers.

Note that the list above does not comprise a complete description of Bylaws contents; it only addresses some of the most common errors made by charter petitioners. Work with your attorney to ensure that your Bylaws are thorough and appropriate.

Finally, avoid copying and pasting from other charter schools' Articles and Bylaws. Many of them contain errors that you could unwittingly replicate. While you may benefit from viewing various examples, take the time to ensure that your own documents are thorough and in compliance with Idaho law.

#### Appendix C: Board of Directors and Petitioning Group

The expertise of your founding board is very important to the PCSC. Please include professional resumes for all board members. Think of it as applying for the “job” of managing student lives and taxpayer funds.

It is likely that there are individuals involved with your petitioning group in ways other than board membership. Please include a list of all persons who are significantly involved with the petition. Include brief descriptions of each individual's role in this pre-opening phase, as well as any intended role over the longer term. This list may include both volunteers and employed or contracted parties.

As you work on this appendix, you should also think about whether the listed individuals meet your definition of “founder,” as this will impact their children's eligibility for an enrollment lottery preference. It is advisable to put the definition in writing to minimize future disputes.

#### Appendix D: School Administration and Organizational Chart

Having the right leader (whose job title is usually Administrator or Principal) is critical to the success of your school. If you have already identified this individual, list his or her name, contact information, and qualifications here. Include his or her resume.

If you have not yet identified a particular individual, provide a description of your ideal school leader and your plan for successful hiring. Be sure to consider the realities of attracting a qualified professional to a unique program or rural area.

Note that while your administrator does not need to be certified as a superintendent, she or he will likely need a skill set extending beyond that of a typical public school principal. This is because, as a Local Education Agency, your school will be responsible for both school-level and district-level functions and reports.

This appendix must also include an organizational chart illustrating your school's leadership structure and indicating how school leaders will report to the board.

## Appendix E: Education Service Provider

If you plan to engage an ESP, administrative rule requires that you provide details including the company name, a contact within the company, and the intended extent of the ESP's participation in the management and operations of the school. Please include the following:

- A term sheet indicating the fees to be paid by the proposed school to the ESP, the length of the proposed contract, the terms for the contract's renewal, and provisions for termination.
- Copies of the two, most recent contracts that the ESP has executed with operating charter schools.
- A detailed description of the ESP's relationship to the school's board of directors.
- A detailed description of how and why the ESP was selected.
- Evidence that the ESP provides high-quality services to similarly situated schools, if applicable.

## Appendix F: Supporting Documentation

This appendix (which may be divided into F1, F2, etc. as appropriate) is the best place to provide supporting documentation for claims made in your petition narrative, budgets, and facility plans.

Be sure to include the following:

- A copy of the letter sent to the superintendent of each district that overlaps the proposed public charter school's primary attendance area pursuant to I.C. 33-5205 (3)(b).
- Any contracts or draft contracts, purchase and sale agreements, etc.
- Any leases or draft leases. These may be for anything from your facility to your printer.
- Any other real estate agreements, including documentation of purchase agreements or donations.
- Any cost estimates, such as for transportation services, facility remodeling, utilities hookups, curricular materials, etc.
- Any facility development proposals, such as for remodeling, new construction, or installation of portables and supporting infrastructure. Be sure to include timelines on which the work will be completed.

In Appendix F, you may also choose to include additional documents that you feel are important to the PCSC's understanding of your proposal.

## Resources

Are you feeling overwhelmed? Take a deep breath. Developing a new charter petition is a daunting task, but you don't need to face it alone. Pull together a quality board and other volunteers to help. Seek out professionals at successful charter schools, many of whom are willing to offer advice. The Idaho Charter School Network, State Department of Education, and our Public Charter School Commission office all stand ready to assist you.

Resist the temptation to hurry through petition development. Take the time to develop a quality proposal that represents the outstanding educational option you hope to provide. Balance optimism with realism. Research your educational program, explain it clearly, and present it alongside a strong business plan that optimizes your likelihood of success.

We appreciate your willingness to take on this challenge. Let us know how we can help.

### [Idaho Public Charter School Commission](#)

304 N. 8<sup>th</sup> Street, Room 242, Boise, ID 83702

[PCSC@osbe.idaho.gov](mailto:PCSC@osbe.idaho.gov)

(208) 332-1561

### [Idaho State Department of Education](#)

650 W State Street, Boise, ID, 83702

[info@sde.idaho.gov](mailto:info@sde.idaho.gov)

(208) 332-6800

### [Idaho Charter School Network & BLUUM](#)

1010 W Jefferson Street, Suite 201, Boise, ID 83702

[info@idahocsn.org](mailto:info@idahocsn.org)

(208) 336-8400



MARCH 15, 2019

# NACSA AUTHORIZER EVALUATION REPORT

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**IDAHO PUBLIC CHARTER SCHOOL COMMISSION (IDAHO PCSC)**

*Authorizer*

**ALAN REED**

*Commission Chair*

**TAMARA BAYSINGER**

*Director*

Funding for this report was provided by the U.S. Department of Education through the National Charter School Resource Center. The National Charter School Resource Center is led by Safal Partners under contract number ED-OII-13-C-0065.



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## ABOUT THE EVALUATION

### PURPOSE AND PROCESS

This evaluation is designed to provide the authorizer with a reflective, formative analysis of its primary strengths, priorities for improvement, and recommendations for moving forward. Through this evaluation, NACSA hopes to provide the authorizer with critical feedback that will accelerate the adoption of practices that will lead to stronger outcomes for students and communities.

This evaluation is based on NACSA's [\*Principles & Standards for Quality Charter School Authorizing \(Principles & Standards\)\*](#), which is recognized as the leading framework for authorizing best practices, having been written explicitly and implicitly into numerous state charter school laws. Consistent with NACSA's *Principles & Standards for Quality Charter School Authorizing*, this evaluation assesses the authorizer's core responsibilities in the following areas:

1. Organizational Capacity and Commitment;
2. Applications and School Openings;
3. Monitoring and Intervention; and
4. Renewal, Expansion, and Closure.

This evaluation is also guided by key findings from NACSA's [\*Quality Practice Project \(QPP\)\*](#), an initiative that seeks to build a stronger evidence base between authorizing practices and student outcomes. Through this research, NACSA studied the practices of authorizers with a range of performance profiles and identified certain practices and perspectives that correlate with strong student and public-interest outcomes. The key findings from this initiative, which are incorporated into this evaluation, include:

- **Commitment.** Great authorizers reflect their institution's commitment to quality authorizing. Authorizing is visible, championed, and adequately resourced, rather than buried in a bureaucracy. The people responsible for day-to-day authorizing functions have influence over decision-making.
- **Leadership.** Great authorizers are dedicated to a mission of giving more children access to better schools through the proactive creation and replication of high-quality charter schools and the closure of academically low-performing charter schools.
- **Judgment.** Great authorizers make decisions based on what will drive student outcomes, not based on checking boxes or on personal beliefs.

This evaluation is the culmination of a process, which included an extensive document review, data analysis, surveys, multiple conversations and discussions with the authorizing staff, and a two-day site visit, during which the evaluation team interviewed authorizing staff, leadership, board members, and charter school leaders.

### ABOUT NACSA

NACSA believes that authorizers are responsible for ensuring that charter schools are good schools for children and the public. As an independent voice for quality charter school authorizing, NACSA uses data and evidence to encourage smart charter school growth. NACSA works with authorizers and partners to create the gold standard for authorizing and build authorizers' capacity to make informed decisions. NACSA also provides research and information that help policymakers and advocates move past the rhetoric to make evidence-based policy decisions. More at <https://www.qualitycharters.org/>.

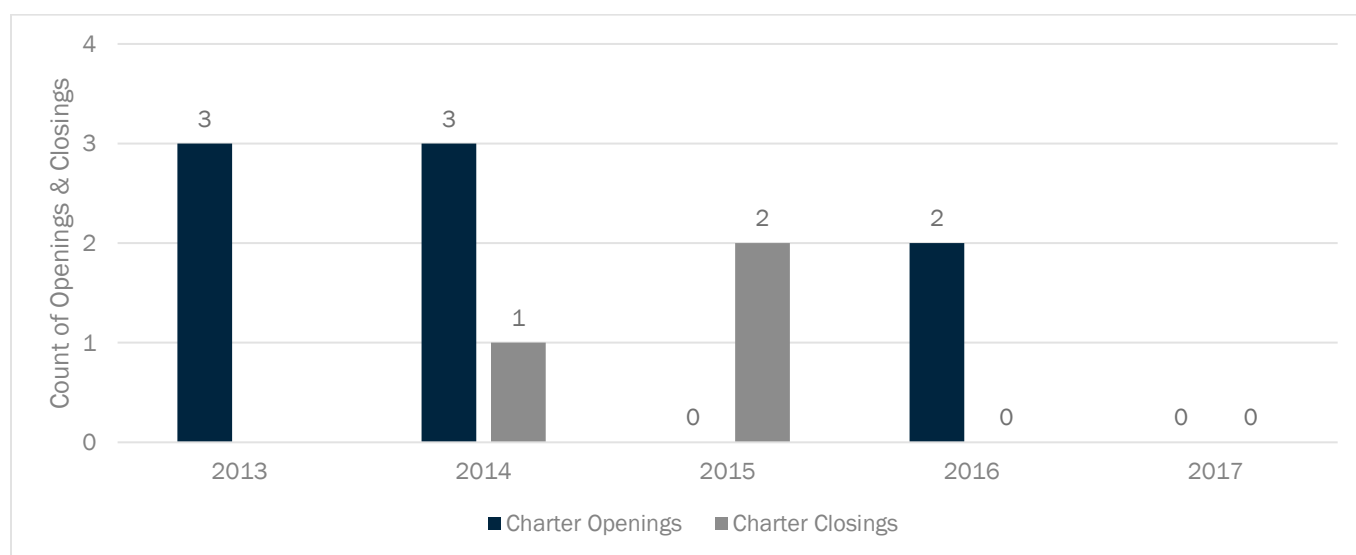
## ABOUT IDAHO PUBLIC CHARTER SCHOOL COMMISSION (IDAHO PCSC)

### IDAHO PCSC PORTFOLIO COMPARED TO STATE SCHOOLS (2017)

	IDAHO PCSC SCHOOLS	STATE
<b>No. of Schools</b>	41	706
<b>Student Enrollment</b>	16,611	280,413
<b>Percent of Students with Disabilities</b>	8.9%	9.6%
<b>Percent of Students Qualifying for Free/Reduced Lunch</b>	26.7%	48.7%
<b>Percent of English Learners</b>	1.5%	5.6%

Source: Idaho Department of Education: <http://www.sde.idaho.gov/finance/#attendance>

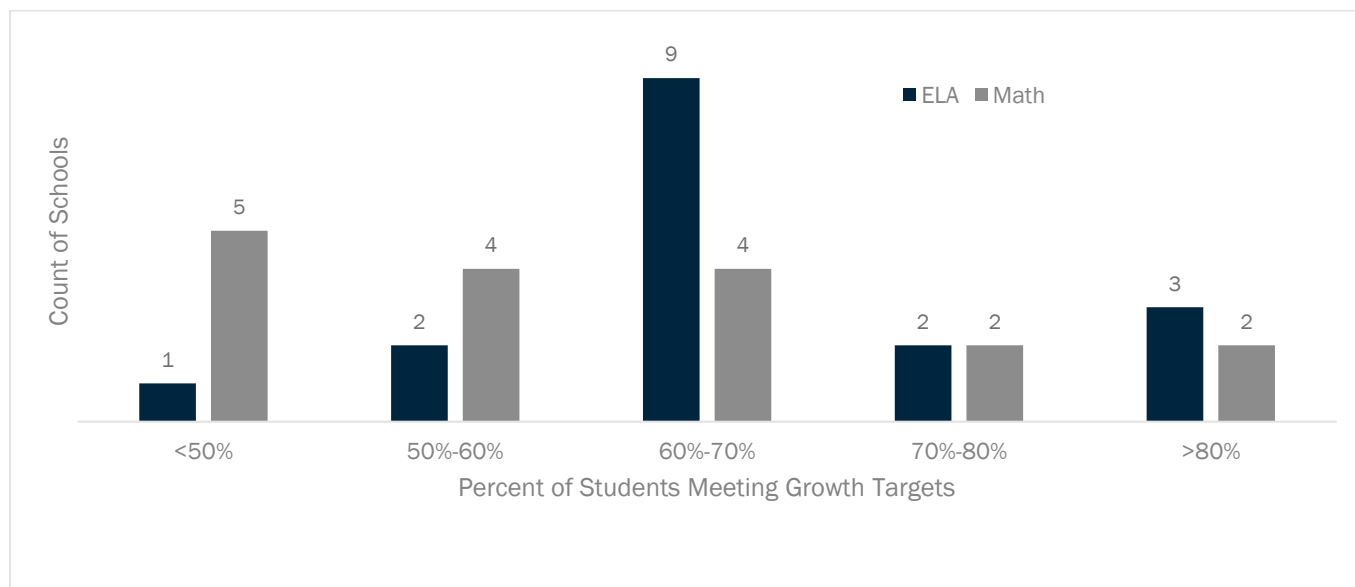
### CHARTER SCHOOL OPENINGS AND CLOSINGS OVER TIME



Source: National Alliance for Public Charter School Database

## CHARTER SCHOOL PERFORMANCE

### Number of Schools Meeting Student Growth Targets<sup>1</sup> in English Language Arts and Math: 2017



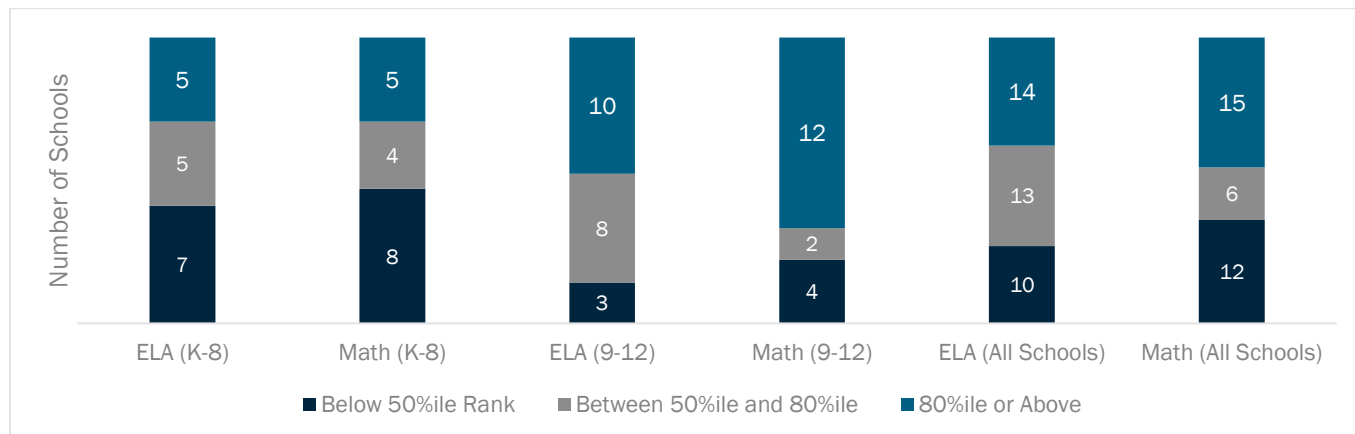
Source: Idaho State Department of Education (2018 Accountability Data: Academic Growth). Downloaded 11/9/2018 from <http://www.sde.idaho.gov/assessment/accountability/index.html>

Note: Data are only available for schools serving K-8 populations. ELA = English/Language Arts

How to Read This Figure: Each bar represents the number of K-8 schools meeting student growth targets on the Idaho Standards Achievement Test (ISAT) as established by the Idaho State Department of Education. For example, in ELA, one school had 50 percent or fewer of its students meet growth targets and 5 schools had 50 percent or fewer meet targets in Math. On the other end of the distribution, three schools had 80 percent or more of its students meet academic growth targets for ELA and two schools had 80 percent or more meet targets for Math.

<sup>1</sup> “To calculate a student’s academic growth target, a student’s scale score from the prior year will serve as a baseline. Next, the score that the student needs to reach Level 3 (Proficient) on the statewide assessment **three years in the future** is identified and called a target scale score. A simple subtraction of the baseline score from the target scale score results in the necessary growth needed to meet proficiency in three years. That number is then divided by three, providing an annual growth target. The change between a student’s 2017 and 2018 ISAT scale score is compared against his or her annual growth target. If the student’s actual growth was greater than or equal to the annual growth target, the student is “on track.” (Idaho State Department of Education, Academic Growth Description, 2018)

### Number of Schools Above and Below the State Average in Proficiency (or Above) by Subject and Level: 2017

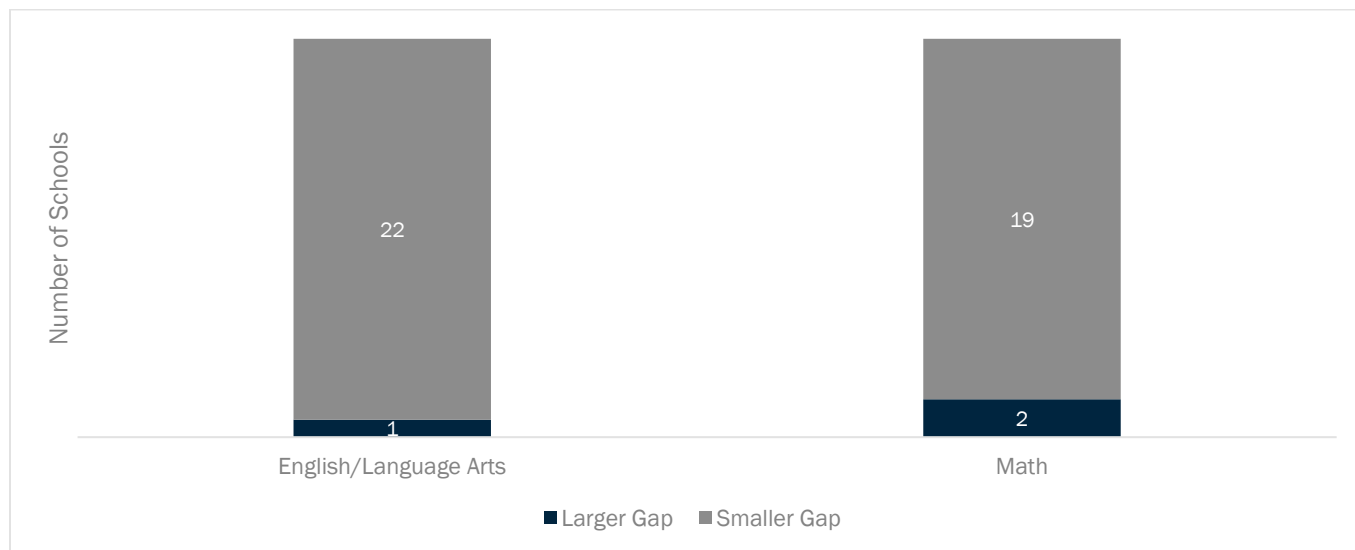


Source: Idaho State Department of Education (2018 Accountability Data: Academic Achievement). Downloaded 11/9/2018 from <http://www.sde.idaho.gov/assessment/accountability/index.html>

Note: For high schools, Idaho also includes a separate English/Language Arts and Math proficiency (or above) percentile rank for alternative high schools. The data represent four such schools overseen by the Idaho PCSC and are included in this analysis. ELA = English/Language Arts

**How to Read This Figure:** Each bar represents the number of schools having a proficiency percentage that ranks the school below the 50th percentile, between the 50th percentile and 80th percentile, and above the 80th percentile. For example, for schools serving grades K-8 in ELA, seven schools proficiency percentage ranked them below the 50th percentile, five ranked between the 50th percentile and 80th percentile, and five ranked higher than the 80th percentile. That also means that 10 schools (5+5) ranked above the 50th percentile.

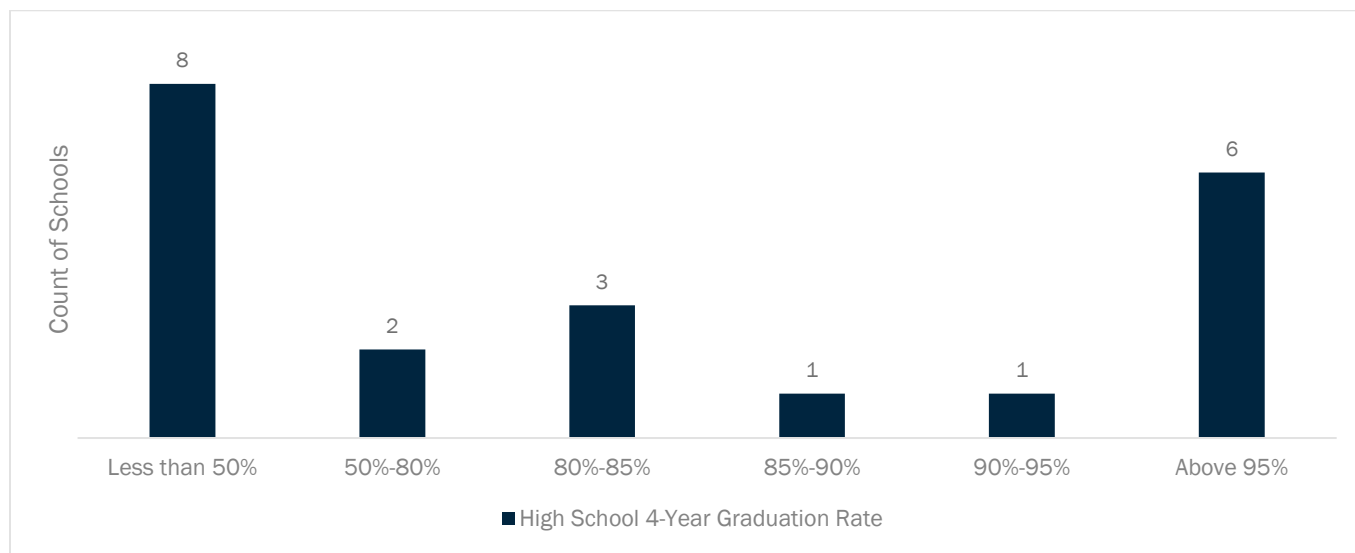
### Number of Schools with Larger and Smaller Gaps in Proficiency Compared to the State for Economically Disadvantaged and Non-Economically Disadvantaged Students: 2017



Source: Idaho State Department of Education (2018 Accountability Data: Academic Achievement). Downloaded 11/9/2018 from <http://www.sde.idaho.gov/assessment/accountability/index.html>

**How to Read This Figure:** The proficiency gap is the difference between the percent of economically disadvantaged and non-economic disadvantaged students scoring proficient (or above) on the state accountability assessment. For 2017 for the state of Idaho, that gap in ELA was 25 percentage points (65 percent proficient for non-economically disadvantaged students and 41 percent for disadvantaged students), and in Math was 24 percentage points (55.3 percent and 31.4 percent, respectively). For example, in Math there were two Idaho PCSC schools with a proficiency gap larger than the state's (i.e. 24 percentage points) and 19 schools with a gap smaller than the state's.

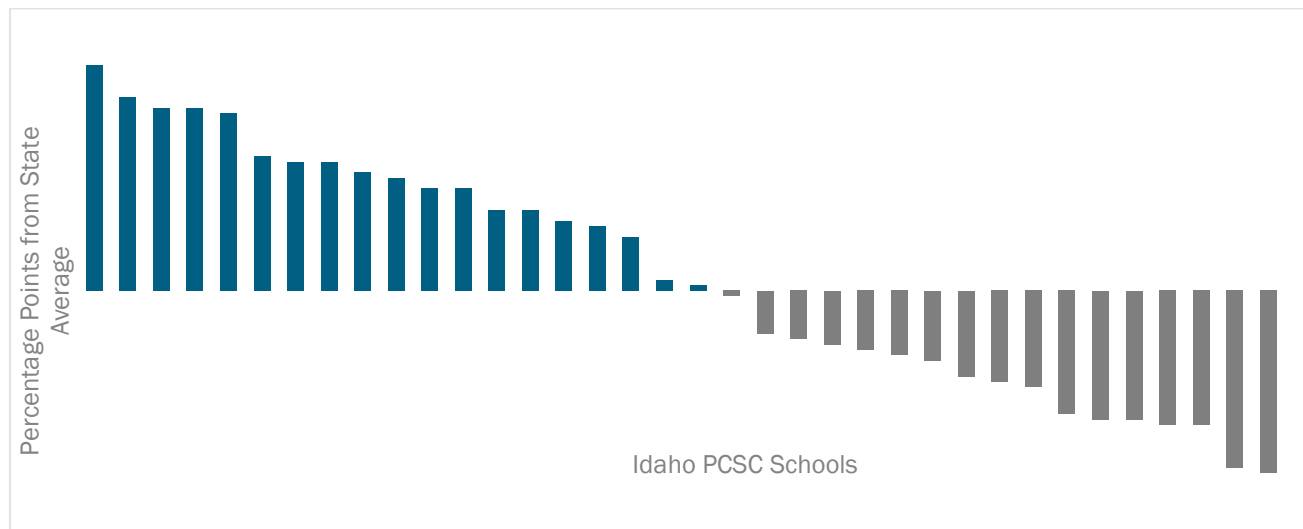
### Count of Schools at Multiple Graduation Rate Percentages: 2017



Source: Idaho State Department of Education (2018 Accountability Data: Graduation Rate). Downloaded 11/9/2018 from <http://www.sde.idaho.gov/assessment/accountability/index.html>

**How to Read This Figure:** Each bar represents the number of high schools within a graduation rate band. For example, eight high schools had less than a 50 percent 4-year adjusted graduation rate as defined by the Idaho State Department of Education. For context, a 4-year adjusted graduation rate of 89.0 percent would be considered at the 50th percentile (i.e. state average). The greater of the typical and alternative high school graduate rate was used in this analysis.

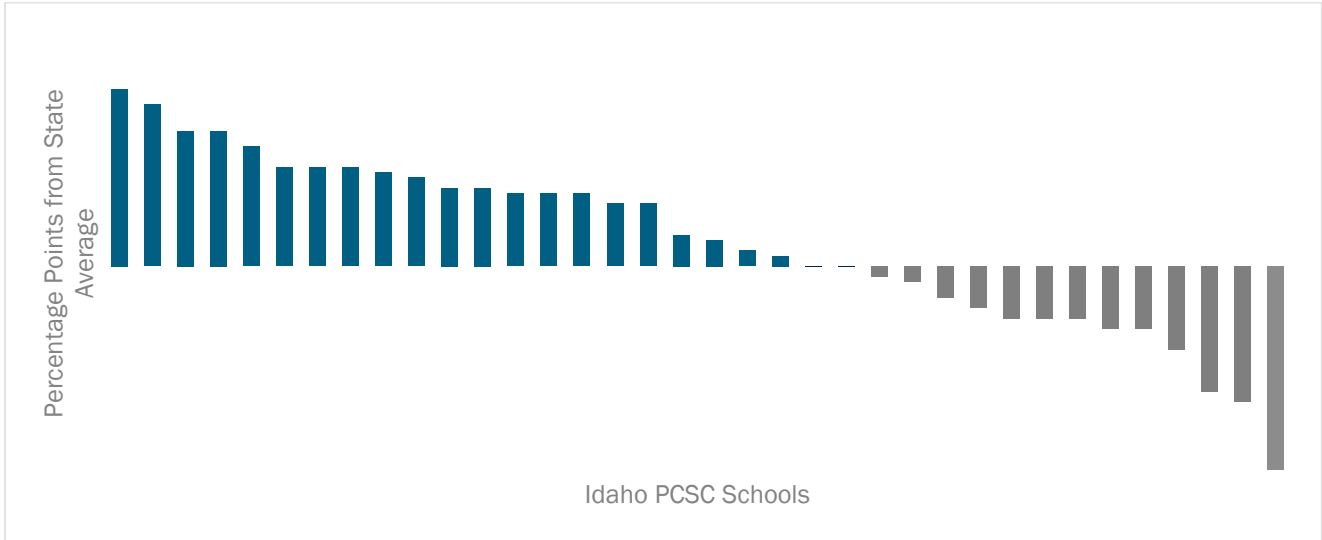
### Idaho PCSC’s Analyses<sup>2</sup> of Schools Above and Below the State Average in Proficiency in ELA: 2017



<sup>2</sup> Idaho PCSC uses stricter inclusion criteria compared to Idaho State Department of Education when analyzing student performance. In contrast to the state, Idaho PCSC excludes alternate ISAT data, only includes students who were continuously enrolled from early in the school year through the test window, and conducts state comparisons at the grade level rather than at the school level. For this reason, we have included both the state’s and the authorizer’s reports of Idaho PCSC’s portfolio performance.



**Idaho PCSC’s Analyses of Schools Above and Below the State Average in Proficiency in Math: 2017**



Source: Idaho Public Charter School Commission (2017 Annual Report). Downloaded 2/13/2019 from <https://chartercommission.idaho.gov/pcsc-schools/pcsc-annual-report/>

Note: Alternative schools are not included in this analysis.

How to Read This Figure: Each bar represents one school’s difference in performance compared to the state average for the enrolled. Positive (blue) bars indicate higher performance than the state; negative (gray) bars indicate lower performance than the state.

## EXECUTIVE SUMMARY

The Idaho Public Charter School Commission (Idaho PCSC) oversees a portfolio of 41 charter schools, including four schools that opened in the 2018-19 school year. The Idaho PCSC is an independent statewide commission composed of seven members appointed by the governor, speaker, or pro tempore. There are four full-time staff members focused on the charter authorizing work of the commission; these staff members serve within the Idaho State Board of Education office. Idaho PCSC shows diligence and intentionality in its academic analyses (e.g., conducting grade-by-grade comparisons; only including in the analyses students enrolled the entire year) to gather an accurate representation of portfolio performance, even though this results in lower proficiency rates than the state reports Idaho PCSC has earned. Based on Idaho PCSC's analyses, in 2017, just over half of its charter schools (54 percent) were meeting or exceeding performance expectations on the academic performance framework revised in 2016. While all four of Idaho PCSC's alternative schools posted performance that trended above state averages for alternative school performance, most of its virtual schools underperformed the state average.

Since NACSA's 2014 Authorizer Evaluation, Idaho PCSC has made several commendable improvements to its policies and practices that should continue to manifest in better charter school outcomes and portfolio performance in the coming years. Idaho PCSC has improved its performance frameworks, designed and implemented a charter renewal process, overhauled its new school application process, and revised its policies and procedures manual substantially. Idaho PCSC issues thorough annual reports to each school in the portfolio that summarize their performance against all three (academic, financial, and organizational) performance frameworks. These reports help schools understand how they are performing and form the basis for a body of evidence to consider in charter renewal. While there are opportunities to further improve Idaho PCSC practices discussed below, NACSA commends the authorizer for a clear commitment to continuous improvement, transparency, and strong support for charter schools in the state.

Interviews with school leaders and education stakeholders make evident that the staff at Idaho PCSC are well-respected and work hard to communicate clear expectations. The staff support schools that are struggling by working to ensure that schools understand expectations, laws, and regulations through meetings and written correspondence. Staff sometimes suggest resources or support organizations but do not overstep appropriate school autonomies. The strong positive relationship between Idaho PCSC and the schools it authorizes is further evidenced by the fact that several charter schools have sought to transfer into the Idaho PCSC portfolio over the past few years.

To improve portfolio performance over time, Idaho PCSC should apply rigorous quality standards in its new school application process. Having approved 100 percent of the new school applications that made their way through the process in the last two years, the Idaho PCSC's approval rate is much higher than the national average of 35 percent. NACSA encourages commissioners and staff to rigorously evaluate new school applicants and only approve those applicants that are fully credentialed, qualified, and prepared to open high-quality schools.

Almost half of schools in Idaho PCSC's portfolio have failed to meet overall performance expectations on the 2017 academic performance framework, suggesting that overall portfolio performance still needs improvement. Idaho PCSC has adopted clear policy language that schools should be renewed based on past performance, not promises of future improvement; the next step for Idaho PCSC is to implement this policy consistently in its recommendations and decision-making. Charter renewals should not be offered to schools repeatedly falling far below academic performance expectations. When offering conditional renewals, Idaho PCSC should evaluate the conditions in a timely manner (e.g., after one or two years of the new charter contract) and only utilize conditions in cases in which schools are reasonably close to meeting performance expectations.

Finally, the Idaho PCSC should develop a clear revocation policy and set of procedures to ensure that students do not languish in low-performing schools. Statute indicates that each authorizer should articulate a clear revocation process. Given that all charter contracts must be for a full five years in Idaho, it is important for Idaho PCSC to articulate and implement revocation processes that protect the interests of students.

## SUMMARY OF RECOMMENDATIONS

### ***Section 1: Organizational Commitment and Capacity***

- 1.1. Demonstrate a commitment to high-quality authorizing by implementing adopted policies with fidelity and holding schools to rigorous performance expectations.
- 1.2. Clarify and expand the current annual planning and goal-setting process to ensure that Idaho PCSC staff and commissioners are setting specific, measurable, attainable, relevant, and time-bound (SMART) goals each year as part of its commitment to continuous improvement.

### ***Section 2: Application and School Opening***

- 2.1. Enforce high expectations by only approving petitions from boards, school leaders, and founding teams that have sufficient capacity to oversee and run high-quality schools.
- 2.2. Apply clear quality criteria to evaluate new school petitions.
- 2.3. Include external evaluators in the application review process.

### ***Section 3: School Monitoring and Intervention***

- 3.1. Develop and implement a systematic process to evaluate schools on the operational framework that also leverages the renewal site visit.
- 3.2. Clarify intervention processes to stipulate triggers for intervention, Idaho PCSC procedural steps, and expectations for school responses.

### ***Section 4: Renewal, Expansion, and Closure***

- 4.1. Renew only schools that have met the standards for academic performance laid out in the accountability frameworks and embedded in the charter performance certificates.
- 4.2. Clarify and consistently enforce financial accountability policies.
- 4.3. Apply renewal conditions in a timely manner and amend Idaho PCSC policies and procedures to ensure that performance expectations are enforced for each year of the charter term.
- 4.4. Establish a clear revocation policy and process to ensure that schools can be held accountable to performance expectations in a timely manner.

## STRENGTHS AND SPOTLIGHTS

### Organizational Capacity and Commitment

*A quality authorizer engages in chartering as a means to foster excellent schools that meet identified needs, clearly prioritizes a commitment to excellence in education and in authorizing practices, and creates organizational structures and commits the human and financial resources necessary to conduct its authorizing duties effectively and efficiently.*

*Reference: NACSA's Principles & Standards for Quality Charter School Authorizing, Standard 1: Agency Commitment and Capacity; and Leadership, Commitment, Judgment: Elements of Successful Charter School Authorizing: Findings from the Quality Practice Project, pgs. 10 – 15.*

- Idaho Public Charter School Commission (Idaho PCSC) maintains policies that are well-aligned to NACSA's *Principles & Standards for Quality Charter School Authorizing*. Specifically, Idaho PCSC has a policies and procedures manual covering topics, such as new school petitioning processes, contract amendments, ongoing monitoring, and charter renewal. Idaho PCSC posts the manual publicly, which transparently articulates Idaho PCSC's roles and duties. The policies regularly cite state statute and Idaho PCSC updates them in a timely manner to reflect changes in statute.
- The commissioners on Idaho PCSC bring diverse skills and expertise, including a number who have been directly involved in charter school start-up. Many of the commissioners have direct professional experience in K-12 or higher education and several have served on local school boards or in elected roles within the state legislature. The commissioners adhere to a conflict of interest policy that applies to state employees and elected officials, as evidenced by meeting minutes that denote when commissioners have recused themselves from specific votes due to conflicts with applicant or renewal schools.
- Professional development is a priority for both staff and commissioners at Idaho PCSC, reflecting a commitment to continuous improvement in policy and practice. The director of the office, Tamara Baysinger, recently completed NACSA's Leaders' Program and has been a regular attendee at professional conferences related to charter authorizing and education reform for many years. Idaho PCSC's budget includes dedicated funds for professional development and memberships, and these funds are utilized appropriately as evidenced by the commissioner reports at the December 2018 regular meeting. At this meeting, several commissioners reported key takeaways and learnings from attending recent NACSA- and ExcelinEd-hosted conferences.
- Idaho PCSC has expanded its staff in recent years to provide oversight to its 41 charter schools. In addition to the director, there are two full-time program managers and a full-time administrative assistant, which represents a 1.5x full-time equivalent increase since the 2014 Authorizer Evaluation. While there is no specific recommended staffing ratio for authorizers, the current ratio of approximately one full-time equivalent per 10 schools is close to some other statewide authorizers; for example, the Massachusetts Board of Elementary and Secondary Education employs a staff of one full-time equivalent per eight schools authorized as of 2015-16. Idaho PCSC also contracts with education practitioners and experts to conduct site visits as part of the charter renewal process. The funding to cover this contracted support was a recent addition to the Idaho PCSC budget from the Idaho legislature. The seven appointed commissioners of the Idaho PCSC make all formal decisions on behalf of the Idaho PCSC.

## Applications and School Opening

*A quality authorizer implements a comprehensive application process that includes clear application questions and guidance; follows fair, transparent procedures and rigorous criteria; includes an interview of all qualified applicants; and grants charters only to applications that demonstrate strong capacity to establish and operate quality schools.*

*A quality authorizer uses the pre-opening process to build relationships, set expectations, and provide technical assistance to schools, and does not let schools open that have not demonstrated their readiness to serve students.*

*Reference: NACSA's Principles & Standards for Quality Charter School Authorizing, Standard 2: Application Process & Decision Making; and Leadership, Commitment, Judgment: Elements of Successful Charter School Authorizing: Findings from the Quality Practice Project, pgs. 16 – 20.*

- Idaho PCSC supports schools through the new school petition process by providing applicants with written feedback and then allowing applicants to submit revisions to their petitions. In the Spring 2018 petition cycle, Idaho PCSC provided clear written feedback to three schools; all three schools exercised their option to revise their petitions, resubmitted within the evaluation window, and Idaho PCSC ultimately approved each petition. This feedback-and-revision process is consistent with recommended practices identified in NACSA's Quality Practices Project, which states that high-quality authorizers have "a multi-stage process in which applicants are provided feedback and are permitted to respond to feedback during the process."
- To further support applicants in developing their new school applications, Idaho PCSC provides helpful guidance in their new school petition process that goes beyond a simple checklist of required items. Rather than formalizing a long list of questions to which an applicant must respond, the guidance document explains statutory requirements and provides suggested considerations in developing a new school petition. The guidance document provides tips on how best to form a good mission statement, how to describe the educational program, the importance of boards, and the need to keep in mind "Founders Syndrome" (in which a founder does not want to relinquish the day-to-day work of operating the school to staff, resulting in micromanaging the administrator or even teachers), etc. The guidance document suggests that the applicant consider enlisting the help of qualified individuals who understand Idaho public school funding in creating a balanced budget for the new school. Helping applicants locate support resources and critical information is an important best practice highlighted in NACSA's Quality Practices Project.



## PRACTICE SPOTLIGHT

Idaho PCSC's pre-opening process supports schools significantly. The process aligns to statutory expectations for standard conditions that a school must satisfy prior to opening. It creates a transparent mechanism for Idaho PCSC to track items, such as securing the facility, obtaining a certificate of occupancy, conducting fair and transparent enrollment lotteries, and establishing health and safety protocols. In interviews, school leaders reported that the pre-opening support was very helpful, especially regarding the availability of Idaho PCSC staff members to meet regularly with school staff and focus the meetings on the particular needs of individual schools.

The robust pre-opening process provides support to schools and establishes accountability around the standard pre-opening conditions. Central to Idaho PCSC's pre-opening support is a detailed spreadsheet of tasks for a board and school leadership to complete during the planning year. The spreadsheet organizes tasks into categories, such as finance, governance, facility, technology, and transportation. Additionally, over the course of the pre-opening year, Idaho PCSC staff members conduct at least five meetings and one on-site school visit to determine the extent to which the school is on track to open successfully.

## School Monitoring and Intervention

*A quality authorizer defines and incorporates into the charter contract, clear, measurable, and attainable academic, financial, and organizational performance standards and targets that the school must meet as a condition of renewal.*

*A quality authorizer conducts contract oversight that competently evaluates performance and monitors compliance; ensures schools' legally entitled autonomy; protects student rights; informs intervention, revocation, and renewal decisions; and provides annual public reports on school performance.*

Reference: NACSA's [Principles & Standards for Quality Charter School Authorizing](#), Standard 3: Performance Contracting and Standard 4: Ongoing Oversight and Evaluation; and [Leadership, Commitment, Judgment: Elements of Successful Charter School Authorizing: Findings from the Quality Practice Project](#), pgs. 13 – 15.

- Idaho PCSC provides helpful support to charter leaders who join their schools after a petition has been granted or after a school has opened. The school leader guidance document contains succinct and clear information to help new school leaders understand the landscape of regulatory entities involved with charters, as well as various ongoing monitoring processes and performance expectations. The document explains how Idaho PCSC will notify schools of academic, operational, and financial concerns. It provides a helpful summary of the responsibilities of the State Board of Education, the State Department of Education, and the Public Charter School Commission, and includes a timeline of reports that schools must submit. The document also includes a summary of what Idaho PCSC measures and includes in the Annual Performance Reports, with helpful examples of how to interpret academic performance measures. Idaho PCSC makes this document available on its website and shares it with newly hired principals joining schools in the portfolio.
- The charter contract, called the performance certificate, contains many components that make for a clear relationship and understanding between Idaho PCSC and the charter school. The performance certificate template includes language regarding Idaho PCSC's ability to non-renew or revoke a charter if the school does not meet academic, organizational, or financial performance expectations. The performance certificate does not contain any provisions or unusual language that infringe on school autonomy. While the performance certificate is strong overall, Idaho PCSC could further strengthen it by specifying what kinds of programmatic or operational changes rise to the level of being "material" and thus requiring authorizer approval.
- Idaho PCSC creates annual reports that provide consistent and actionable information to schools. The annual report explicitly summarizes the school's annual performance against the three key performance frameworks: academic, operational, and financial. The annual report contains indicators, measures, and metrics for student academic proficiency, student academic growth, post-secondary readiness (for high schools), and board performance and stewardship. In interviews, school leaders expressed that information in the report is helpful and informs their practices, especially regarding school operations, finances, and board practices. In a recent survey of school leaders, 88 percent of respondents (15 of 17) agreed that Idaho PCSC evaluates schools regularly. Notably, at the time of NACSA's previous evaluation in 2014, Idaho PCSC had planned – but had not yet developed – the current annual report format aligned to recent statutory requirements.

**PRACTICE SPOTLIGHT**

School closure is one of the more difficult but also impactful parts of charter authorizing. Ideally, the closure process proceeds respectfully and collaboratively between the school’s staff, board of directors, and the authorizer. In practice, tense conversations and conflict can inhibit an orderly closure process. For this reason, NACSA recommends that authorizers maintain a “detailed closure protocol that ensures timely notification to parents; orderly transition of students and student records to new schools; and disposition of school funds, property, and assets in accordance with law” (*Principles and Standards*, pg. 21).

Idaho PCSC has developed a detailed closure protocol that supports these critical steps and could serve as a model to other authorizers. The protocol was developed in careful consideration of best practice guidance from NACSA and exemplar materials from other authorizers, such as the State University of New York and the Colorado Charter School Institute. There is a clear conceptual timeline that identifies student, parent, and staff notification as a first step in the process. A detailed table outlines specific tasks and assigns responsible parties to ensure that tasks are carried out. The table maintains space to note deadlines and status throughout the process as a tracking and documentation tool. The level of detail and clarity in the document is exemplary for structuring a transparent and orderly closure process.

**Renewal, Expansion, and Closure**

*A quality authorizer designs and implements a transparent and rigorous process that uses comprehensive academic, financial, and operational performance data to make merit-based renewal decisions and revokes charters when necessary to protect student and public interests.*

*A quality authorizer encourages high-performing charter schools to expand through a transparent process based on clear eligibility standards and historical performance records.*

*Reference: NACSA’s [Principles & Standards for Quality Charter School Authorizing](#), [Standard 5: Revocation and Renewal Decision Making](#); and [Leadership, Commitment, Judgment: Elements of Successful Charter School Authorizing: Findings from the Quality Practice Project](#), pgs. 16 – 17.*

- As part of its commitment to transparency, Idaho PCSC provides strong guidance and support to schools throughout the renewal process. The “Performance Certificate Renewal Process” guidance document outlines a multi-year timeline connecting annual performance reports to the renewal process occurring in the final year of charter contract. The “Reporting Auxiliary Data at Renewal” guidance document explains how schools can submit additional academic performance data as part of the renewal process and provides guidance about what types of data are most helpful. To ensure that schools understand their prospects for renewal, as well as the process in general, Idaho PCSC staff meet with each charter school personally in the year prior to its renewal to review school performance and discuss the process.
- The adopted policies and procedures for charter renewal demonstrate Idaho PCSC’s intention to make outcomes-based renewal decisions. For example, the policies indicate that “renewal decisions shall be based on past outcomes, not on the promise of future improvement.” This language is consistent with NACSA’s *Principles & Standards* for charter authorizing and makes clear the expectation that school outcomes are central to renewal decision-making. While the articulated policies are strong, the recommendations that follow in this document highlight opportunities to implement the policies with fidelity.



## RECOMMENDATIONS | ORGANIZATIONAL CAPACITY AND COMMITMENT

*A quality authorizer engages in chartering as a means to foster excellent schools that meet identified needs, prioritizes a commitment to excellence in education and in authorizing practices, and creates organizational structures and commits human and financial resources necessary to conduct its authorizing duties effectively and efficiently.*

### **Recommendation 1.1: Demonstrate a commitment to high-quality authorizing by implementing adopted policies with fidelity and holding schools to rigorous performance expectations.**

While Idaho PCSC has made great strides in revising and improving the policies that guide its work in recent years, the authorizer does not consistently hold schools accountable to meeting expectations. Idaho PCSC has made revisions both in response to statutory changes and as part of the organization's continuous improvement efforts. One significant statutory change was the introduction of a charter renewal process; prior to 2014 legislation, charter contracts were issued for an indefinite time period and there was no explicit renewal process. From 2014 through 2016, Idaho PCSC designed a new performance framework, created a renewal process, and updated its policies and procedures to outline roles and expectations. The first two rounds of charter renewal occurred in 2017 and 2018. Simultaneously, Idaho PCSC has been working to continuously improve its new school process.

While Idaho PCSC has dedicated time and expertise to developing high-quality policies and practices, there are recent instances in which staff recommendations and/or commissioner decisions have not upheld the adopted performance standards. For example, consistent with language from NACSA's *Principles & Standards*, Idaho PCSC has adopted a policy that renewal decisions shall be "based on documented outcomes" and "past outcomes, not on promises of future improvement" (Idaho PCSC policies Section V). However, Idaho PCSC has renewed 25 out of 25 schools in the first two years of charter renewal, 14 of which had received the academic designation of "remediation" or worse in the year preceding their renewal. In these same two years, the commission approved eight out of eight new school applications, including one application in which the commission overruled a staff recommendation to deny. These decisions do not fully align to performance frameworks and adopted policies. In interviews, staff noted that several aspects of school accountability changed simultaneously; namely, Idaho PCSC adopted a new performance framework, the state adopted a new standardized assessment, and schools were subject to new contract terms that had not existed previously. In this context, Idaho PCSC staff and commissioners felt a potential non-renewal decision would have been indefensible on appeal. Additionally, commissioners noted that strong pro-charter groups have created political pressure to renew

charter schools across the state. This practice does not align with NACSA *Principles & Standards*, which states that a high-quality authorizer does not make renewal decisions, including granting probationary or short-term renewals, on the basis of political or community pressure or solely on promises of future improvement (page 20). In the coming years, Idaho PCSC should ensure that decisions align with its stated commitment to high-quality authorizing by non-renewing charter schools that receive low accountability ratings for consecutive years and only approving new school applicants that fully meet rigorous quality criteria.

### **Recommendation 1.2: Clarify and expand the current annual planning and goal-setting process to ensure that Idaho PCSC staff and commissioners are setting specific, measurable, attainable, relevant, and time-bound (SMART) goals each year as part of its commitment to continuous improvement.**

As noted in the Strengths section, Idaho PCSC evidences a commitment to continuous improvement through ongoing professional development and specific improvement efforts, such as the development of clear policies and procedures. However, Idaho PCSC does not have an explicit goal-setting process conducted among commissioners and staff. At present, the staff evidence strong knowledge of state statute and national best practice, and can clearly articulate specific steps Idaho PCSC has taken to improve authorizing policy and practice. However, there is not a clear process or document to identify SMART goals for the commission each year. SMART goals would ensure alignment between commissioners and staff, and provide an opportunity to articulate goals in terms of school performance and measure progress toward those goals. In interviews, commissioners noted that they generally do not provide direct input into annual planning processes for the staff. At the observed December 2018 commission meeting, commissioners exemplified their commitment to continuous improvement as they discussed takeaways from recent conferences. For example, commissioners noted a desire to learn more about states, such as Colorado, in which district-issued tax-exempt bond dollars are accessible to charter schools for facilities. Idaho PCSC will better leverage staff and commissioner expertise and commitment if it conducts an explicit annual goal-setting process and then ties its goals back to opportunities to improve the overall performance of charter schools in its portfolio.



## RECOMMENDATIONS | APPLICATIONS AND SCHOOL OPENING

*A quality authorizer implements a comprehensive application process that includes clear application questions and guidance; follows fair, transparent procedures and rigorous criteria; includes an interview of all qualified applicants; and grants charters only to applications that demonstrate strong capacity to establish and operate quality schools.*

*A quality authorizer uses the pre-opening process to build relationships, set expectations, and provide technical assistance to schools, and does not let schools open that have not demonstrated their readiness to serve students.*

### **Recommendation 2.1: Enforce high expectations by only approving petitions from boards, school leaders, and founding teams that have sufficient capacity to oversee and run high-quality schools.**

While Idaho PCSC staff members thoroughly review each petition and make deliberate and thoughtful approval or denial recommendations, there remains some misalignment between staff recommendations and commissioners' decisions. Idaho PCSC's executive director and both program managers read each application in full, write individual analyses, and discuss those analyses. The staff recommendations to the commissioners note areas of weakness and often propose conditions as part of the approval recommendations. However, commissioners have occasionally removed suggested conditions or gone against staff recommendations altogether, which has on occasion resulted in failed or troubled schools. For example, a school that commissioners approved against staff's recommendation has failed to meet several basic terms of its contract, has faced high staff and board turnover, and has garnered community complaints and compliance violations.

Additionally, Idaho PCSC placed conditions on more than a third of approved petitions in the past two years, suggesting that several approved applicants were not yet ready to open schools. Overall, Idaho PCSC has approved 100 percent of the charter petitions that have come before the commission in the past two years. In interviews, commissioners acknowledge that, in retrospect, they should not have approved some of the recent applications or at least required some applicants to undergo an additional planning year in order to open successfully. This is a continuation of a trend that NACSA identified in 2014, when Idaho PCSC was approving the great majority of petitions despite significant shortcomings. Given the recently awarded federal CSP grant and expected influx of charter applications, it is particularly important to ensure alignment among staff members and commissioners now to enforce high expectations for new applications.

As part of enforcing high expectations for new school applicants, commissioners should take note when staff point out weaknesses in the founding board and/or school leadership teams as part of their due diligence and analysis. In interviews, commissioners recognize the need to improve

screening and expectations for the capacity of board members. To support commissioners in better understanding how staff are evaluating the capacity of founding teams, Idaho PCSC should consider more detailed training for commissioners in both nationally accepted best practices and the details of the current evaluation process, such as the capacity interview that the staff conducts.

Idaho PCSC's new petition committee is an encouraging development in this regard. In 2018, Idaho PCSC established a petition committee composed of commissioners and staff members to support a more thorough analysis of incoming applications and create the space for detailed reflection on past application cycles. In interviews, commissioners and staff members assert that the newly established committee enables them to focus on particular issues and better understand the rationale behind staff members' recommendations. The petition committee is a positive step toward improving alignment between staff recommendations and commissioner decision-making in an effort to enforce rigorous standards.

### **Recommendation 2.2: Apply clear quality criteria to evaluate new school petitions.**

Idaho PCSC currently uses its guidance documents for new school applicants and for outlining standards of quality to establish and apply quality criteria for new school applicants. However, the documents do not fully align and do not clearly present quality criteria for new school applicants. There are elements of Idaho PCSC's new school evaluation process that reflect best practices outlined in NACSA's *Principles & Standards*, including substantive in-person interviews with each qualified applicant (pg. 13). Yet in interviews, staff explained that the standards of quality were developed after the guidance document and that the two documents present a few inconsistencies; for example, the guidance document suggests applicants include their rationale for selecting an Educational Service Provider (ESP) but the standards of quality do not clarify selection criteria for an ESP beyond evidence that an ESP "provides high-quality service to similar schools." (Standards of Quality Appendix E sub-bullet d.) While staff attempt to use the standards of quality to review each application, the document is general enough such that reviewers can interpret and apply expectations differently. For example, one part of the document reads, "The special services plan is

complete and addresses the needs of special populations, including, but not limited to: special education, at-risk, gifted, and English Language Learners.” While this statement identifies general content that should be included in an application, it does not describe the details that a quality response should include. For instance, it does not instruct the reviewer that schools must have processes in place to identify students with special needs or that once an Individualized Education Plan has been established, it must be updated regularly and discussed with parents. In interviews, Idaho PCSC staff indicate that they used to employ a more detailed rubric as part of the application review process but ultimately discontinued use of that rubric because it seemed to provide too much guidance to applicants and not enough space for staff to exercise professional judgment. While NACSA acknowledges that authorizers should use professional judgment when evaluating applications, it is still important that “evaluation criteria describe both the rigorous standard and the specific information required to meet the standard” (Quality Practices Project, pg. 18). Idaho PCSC should ensure full alignment between the guidance document and the standards of quality document, and further, provide sufficient detail to apply quality criteria objectively.

**Recommendation 2.3: Include external evaluators in the application review process.**

While Idaho PCSC staff members collaborate internally to evaluate new school applications, Idaho PCSC does not currently employ external reviewers. External reviewers would strengthen the process and help substantiate staff recommendations to commissioners. Idaho PCSC staff members should train each external reviewer on Idaho PCSC’s most updated petition review process. Every external reviewer should provide a thorough written analysis of the petition and participate in the related capacity interview.

Per NACSA’s *Principles & Standards* (pg. 13), incorporating external evaluators with educational, organizational, financial, and legal expertise will provide important perspectives to commissioners and highlight relevant best practices. External reviewers often have experiences working with other authorizers and in other states, and thus can bring additional perspectives and expertise to the petition review process. This added capacity ultimately benefits Idaho PCSC staff members and commissioners by increasing breadth of expertise and by limiting the burden of all Idaho PCSC staff reading every petition. Additionally, in cases of application denial, the inclusion of external evaluators helps legitimize such decisions to the public.

## RECOMMENDATIONS | SCHOOL MONITORING AND INTERVENTION

*A quality authorizer defines and incorporates into the charter contract clear, measurable, and attainable academic, financial, and organizational performance standards and targets that the school must meet as a condition of renewal.*

*A quality authorizer conducts contract oversight that competently evaluates performance and monitors compliance; ensures schools' legally entitled autonomy; protects student rights; informs intervention, revocation, and renewal decisions; and provides annual public reports on school performance.*

### **Recommendation 3.1: Develop and implement a systematic process to evaluate schools on the operational framework that also leverages the renewal site visit.**

Though the operational performance framework measures are strong, Idaho PCSC has not fully codified how it tracks submissions and how each submission maps to an indicator on the framework. To evaluate a school against the framework, Idaho PCSC currently collects some information from schools and other state agencies, including the Department of Education. However, Idaho PCSC does not efficiently collect all requisite information or appropriately categorize that information. For example, the Department of Education oversees charter school compliance with special education law and maintains all the information regarding compliance with the law. Special education compliance also appears on Idaho PCSC's operational framework but Idaho PCSC does not have a defined procedure to obtain specific compliance information from the Department of Education on a set timeline. With multiple sources of information, it is especially critical that Idaho PCSC codify the process to obtain data on each operational framework indicator to consistently hold all schools accountable for their performance.

To improve operational oversight, Idaho PCSC should continue the work it has started to map the various documents and data submissions to the indicators on the operational framework. This map should align to the submissions calendar that Idaho PCSC already supplies to schools and the map should articulate the specific evidence used to evaluate each indicator. The mapping process itself will help staff identify areas of the framework in which Idaho PCSC may not be presently collecting sufficient data or information. For example, in interviews staff mentioned that they do not pro-actively collect information about school enrollment practices each year and instead rely on community members or school staff members to raise any enrollment concerns directly to Idaho PCSC. Instead, Idaho PCSC could review enrollment forms and/or lottery documents or even use a "mystery caller" strategy to confirm that schools are adhering to open enrollment rules. In addition to the map, Idaho PCSC should continue its work to develop a data system or tracking tool that confirms whether a school has submitted each item in a timely manner and whether the item met expectations.

Finally, Idaho PCSC should embed operational framework components into the pre-renewal site visit rubric to capitalize on the opportunity to confirm previously submitted information. The pre-renewal site visit is the only site visit during which Idaho PCSC uses pre-established criteria to evaluate a school; other site visits are primarily for relationship-building visits and occur in an ad hoc manner. Currently, site visit evaluators collect some qualitative information pertinent to Idaho PCSC's operational framework, such as whether the school is faithful to its mission and is implementing the key design elements outlined in the performance certificate. However, the site visit rubric does not address the organizational framework and does not include important components of the framework, such as employee credentialing, background checks, and information handling, among other items. Idaho PCSC could verify, or spot check, all these components during the pre-renewal site visit.

### **Recommendation 3.2: Clarify intervention processes to stipulate triggers for intervention, Idaho PCSC procedural steps, and expectations for school responses.**

Though Idaho PCSC has several building blocks of a clear intervention process in place, triggers, procedural steps, and expected school responses are not codified fully. Idaho PCSC provides courtesy letters to schools when concerns arise regarding a school's operations, legal compliance, or academic status. For financially underperforming schools, Idaho PCSC has the option to issue a notice of concern and has, at times, requested more frequent financial reports from a school. Idaho PCSC also notifies the Department of Education, which may elect to modify the school's payment schedule to ensure that funds are not advanced to a financially faltering school. However, the courtesy letters and financial notices of concern do not consistently explain what procedural steps Idaho PCSC will take to support schools nor do they always identify clear time-bound expectations for schools to rectify the issues. For example, in a recently issued sample notice of concern, Idaho PCSC notes that the school in question is likely to experience a substantial budget shortfall based on low enrollment but does not require a follow-up response from the school, such as submitting a revised balanced budget on a specific

timeline. Clearly documenting procedural steps and schools' responses to notices of concern would enable Idaho PCSC to address problematic practices consistently across its portfolio and would also hold schools accountable to meeting expectations.

Idaho PCSC has not clearly identified the levels of under-performance that trigger intervention or that could impact renewal prospects. The 2017 portfolio annual report identifies a number of schools that were underperforming in the operational or financial frameworks. However, there was not a clear paper trail of courtesy letters or notices of concern for each of the impacted schools and it appeared that some performance issues had persisted for multiple years. For example, as of January 2018, there were at least three schools that had not met expectations on the financial performance framework for multiple consecutive years. Furthermore, two of these schools were renewed in 2018 without specific financial conditions to their renewal. In interviews, commissioners acknowledge that Idaho PCSC has not placed suitable financial performance conditions on schools demonstrating financial shortcomings. Additionally, commissioners suggest in interviews that Idaho PCSC finds it difficult to enforce interventions while still providing schools the appropriate level of autonomy. To protect school autonomy, Idaho PCSC should avoid prescriptive inputs that change the school's program and, instead, focus on establishing clear expectations for outputs.

While preserving the existing policies regarding courtesy letters and notices to entities responsible for enforcement, Idaho PCSC should develop more detailed procedures to guide intervention. Drawing from NACSA's *Principles & Standards*, Idaho PCSC should develop and publish intervention procedures that state the conditions that may trigger intervention and the types of actions that may result. Clearly identifying the triggers for different tiers of intervention would enable Idaho PCSC to provide consistent support to schools in similar situations. The procedures should include provisions such that, for a school rated as "does not meet" on a specific indicator, Idaho PCSC codifies the improvements necessary and the expected timeline, based on the severity of the issue. The procedures should also include descriptions of how non-compliance could escalate to becoming a condition on renewal and/or a possible component of a non-renewal or revocation decision. Additionally, Idaho PCSC should issue and enforce notices of financial concern that include specific time-bound corrective action and, if a school is going through a renewal, include the same types of specific and time-bound corrective action steps as conditions to the renewal. Idaho PCSC should consider conducting more regular site visits using clear evaluative criteria, in addition to the pre-renewal site visit, to schools with intervention plans. Specific, time-bound, and published Idaho PCSC intervention procedures would support the schools in greatest need of improvement.

## RECOMMENDATIONS | RENEWAL, EXPANSION, AND CLOSURE

*A quality authorizer designs and implements a transparent and rigorous process that uses comprehensive academic, financial, and operational performance data to make merit-based renewal decisions and revokes charters when necessary to protect student and public interests. A quality authorizer encourages high-performing charter schools to expand while establishing clear eligibility standards for school past performance and a clear process for considering expansion and replication requests.*

### **Recommendation 4.1: Renew only schools that have met the standards for academic performance laid out in the accountability frameworks and embedded in the charter performance certificates.**

Though Idaho PCSC has strong stated policies and procedures to hold schools accountable for performance, decisions to renew schools do not consistently align to the established performance expectations. In the spring of 2018, Idaho PCSC renewed 13 charter schools, but only seven of these schools met academic performance expectations in the most recent year (i.e. 2016-17) and only four schools met academic expectations in at least three of the four years under review. Similarly, in 2017, Idaho PCSC renewed 12 charter schools but only four of the 12 schools had met academic expectations in the most recent year (i.e. 2015-16). As noted in Recommendation 1.2, the renewal process is still relatively new alongside new standardized assessments and other accountability-related statutory changes. While the nascency of the overall process and the changes to the academic performance framework can complicate the application of rigorous expectations in renewal, the net effect of these two cycles of charter renewal could be detrimental to students, as evident in the assessment data. Ten of the recently renewed charter schools have math proficiency rates more than 15 points lower than the state average and two of these schools are more than 30 points lower than the state average. Four of the recently renewed charter schools have literacy proficiency rates more than 15 points lower than the state average. Furthermore, because Idaho statute only provides for a five-year charter contract term, each renewed school received five additional years to serve students.

Idaho PCSC policies indicate that “the [school’s] academic accountability designation shall guide the PCSC’s renewal or non-renewal decision-making” and further that “schools achieving an academic accountability designation of critical are likely to be recommended for non-renewal.” These policies align to NACSA *Principles & Standards*, which state that a quality authorizer “grants renewal only to schools that have achieved the standards and targets stated in the charter contract” and by extension, the performance frameworks articulated in that contract. The established policy aligns to both statute and NACSA recommendations by creating a focus on academic achievement in renewal decision-making. However, decision-making does not align to the stated policy. If implemented as written, the renewal policy could ensure that students are not continuing to

attend schools that significantly underperform state averages.

### **Recommendation 4.2: Clarify and consistently enforce financial accountability policies.**

Idaho PCSC renewal decisions and conditions on applicable renewals do not consistently reflect whether a charter school has met expectations on the financial performance framework. In the 2018 renewal cycle, Idaho PCSC recommended four schools for renewal, inclusive of evidence that the schools were not meeting financial performance expectations. Two of these schools received “critical” ratings on the financial performance framework and yet the renewal recommendations did not include specific financial targets for the schools to reach during their renewed performance certificates. Idaho PCSC policies indicate that “the academic accountability designation shall guide Idaho PCSC’s renewal or non-renewal decision-making. Renewal or non-renewal decision-making shall also be influenced by results on the financial, operational, and mission-specific sections of the framework.” This policy statement indicates that financial performance should factor into renewal decisions but it does not clearly state that a school could be non-renewed based solely on its financial performance. To ensure that schools maintain appropriate financial sustainability, Idaho PCSC should clarify in policy and practice that schools could be non-renewed based on their financial performance. Furthermore, when making renewal decisions for schools with persistently poor financial performance, Idaho PCSC should either non-renew the school or establish specific, time-bound conditions for improvement that will be applied promptly in the new charter term, consistent with Recommendation 4.1 in this section. It is important to enforce expectations for financial performance and sustainability to ensure continuity of service to students. If a school must close suddenly due to financial concerns, students may not have sufficient time to identify a new high-quality school to attend or that school may already be full.

### **Recommendation 4.3: Apply renewal conditions in a timely manner and amend Idaho PCSC policies and procedures to ensure that performance expectations are enforced for each year of the charter term.**

Idaho PCSC has offered conditional renewals to all schools

that were not meeting performance expectations at the time of their renewal. However, the conditions are not evaluated until three years into the new performance certificate and thus not soon enough to fully protect the interest of students. In the past two years, Idaho PCSC has offered conditional renewal to 14 out of 25 charter schools that were not yet meeting academic performance expectations as of their renewal. Idaho PCSC placed performance conditions on these renewals designed to facilitate progress monitoring during the term of the new performance certificate. However, there is a time lag between the start of the new contract and the effective date for the performance conditions. For example, a school that earned renewal in 2018 received academic conditions to be evaluated after the conclusion of the 2020-21 school year, more than three years after the renewal decision and into the fourth year of the renewed charter term. Conditions should be evaluated in a timely manner and in a stepwise progression. For example, if Idaho PCSC provides renewal conditions in the spring, a school would have sufficient notice to plan and implement program improvements that should produce results at the end of the first year of the new contract. For conditions requiring more time to address, Idaho PCSC should hold schools accountable to implementing planned programmatic changes that demonstrate gradual improvements and culminate in the school meetings its conditions by an appropriate timeline determined by Idaho PCSC.

Idaho PCSC should clarify language in its adopted policies to ensure that schools understand that renewal decisions, including conditional renewals, will be based on a cumulative performance record. The policies currently state that “schools achieving *an* academic accountability designation of honor or good standing shall be recommended for renewal” [emphasis added]. The use of the article “an” in this part of the policies suggests that renewals hinge primarily on the most recent year of performance. Idaho PCSC should amend existing authorizing policies and applied practices to ensure that the full cumulative performance record factors into the renewal decision, including whether the school receives a conditional renewal.

#### **Recommendation 4.4: Establish a clear revocation policy and process to ensure that schools can be held accountable to performance expectations in a timely manner.**

While Idaho PCSC maintains many clear policies and processes in the areas of annual performance reviews and charter school renewal, there is not an explicit policy nor procedure for charter school revocation beyond what is specifically articulated in statute, and the statute has some ambiguity in this area. In interviews, staff indicated that when the statute changed to require regular charter renewals, the focus of the authorizing work shifted from revocation to renewal as the primary mechanism to enforce school accountability. However, in the process of rolling out the new renewal policies and processes, Idaho PCSC has sacrificed some clarity regarding the grounds for revocation. At present, Idaho PCSC contends that charter revocation is only possible in two situations. The first is revocation if the school does not meet a specific written condition for school improvement. The second is revocation in the event of an imminent public safety issue. These two reasons are articulated in Section 33-5209C(7) of the Idaho statute. However, another portion of statute indicates that “an authorized chartering entity must develop revocation and non-renewal processes” and further that the prospect of revocation or renewal “shall be limited to failure to meet the terms of the performance certificate *or* the written conditions established pursuant to the provisions of subsection (1) of this section,” [emphasis added] Section 33-5209B(8). Considering the “or” component of this statement, the statute suggests that non-renewal or revocation can occur if a school fails to meet the terms of its performance certificate (i.e. charter contract). Further, the statute indicates that authorizers should develop articulated processes to conduct such a revocation. NACSA recommends that Idaho PCSC return to addressing revocation clearly in its adopted policies. A clear revocation policy should identify the performance levels over time that would trigger revocation and reference back to the statutory expectation that a school meet all the terms of its performance certificate.



## LOOKING FORWARD

### SHORT-TERM RECOMMENDATIONS

#### RECOMMENDATION

1.2. Clarify and expand the current annual planning and goal-setting process to ensure that Idaho PCSC staff and commissioners are setting specific, measurable, attainable, relevant, and time-bound (SMART) goals each year as part of its commitment to continuous improvement.

2.2 Apply clear quality criteria to evaluate new school petitions.

2.3 Include external evaluators in the application review process.

3.2. Clarify intervention processes to stipulate triggers for intervention, Idaho PCSC procedural steps, and expectations for school responses.

4.3. Apply renewal conditions in a timely manner and amend Idaho PCSC policies and procedures to ensure that performance expectations are enforced for each year of the charter term.

4.4. Establish a clear revocation policy and process to ensure that schools can be held accountable to performance expectations in a timely manner.

### LONG-TERM RECOMMENDATIONS

#### RECOMMENDATION

1.1. Demonstrate a commitment to high-quality authorizing by implementing adopted policies with fidelity and holding schools to rigorous performance expectations.

2.1. Enforce high expectations by only approving petitions from boards, school leaders, and founding teams that have sufficient capacity to oversee and run high-quality schools.

3.1. Develop and implement a systematic process to evaluate schools on the operational framework that also leverages the renewal site visit.

4.1. Renew only schools that have met the standards for academic performance laid out in the accountability frameworks and embedded in the charter performance certificates.

4.2. Clarify and consistently enforce financial accountability policies.

### HELPFUL RESOURCES AND PROGRAMS

- To support development of a rubric for the new school petition process, see NACSA's guidance on Application Process and Decision Making ([https://www.qualitycharters.org/wp-content/uploads/2018/11/NACSA\\_Core\\_Resources\\_Application\\_Process\\_and\\_Decision\\_Making.pdf](https://www.qualitycharters.org/wp-content/uploads/2018/11/NACSA_Core_Resources_Application_Process_and_Decision_Making.pdf))

- To improve ongoing monitoring work, Idaho PCSC could consult NACSA's intervention protocol ([https://www.qualitycharters.org/wp-content/uploads/2019/01/Intervention\\_Protocol.pdf](https://www.qualitycharters.org/wp-content/uploads/2019/01/Intervention_Protocol.pdf))
- To support the development of a revocation policy and process, Idaho PCSC could review NACSA's guidance on tiered intervention ([https://www.qualitycharters.org/wp-content/uploads/2019/01/Intervention\\_Protocol.pdf](https://www.qualitycharters.org/wp-content/uploads/2019/01/Intervention_Protocol.pdf))



## BIOGRAPHIES

**Brenna Copeland** is the founder of EdPlex, a consulting company focused on supporting schools and districts to rapidly improve student achievement. Brenna has helped establish school accountability procedures at the state and local levels, analyzed district supports through a lens of academic outcomes, and helped governing bodies make data-driven decisions in the interest of students. Brenna has 16 years of experience in the education field among high-performing charter schools and districts. She led Denver Public Schools' charter and innovation school authorizing work from 2011 to 2015, responsible for more than 80 schools. Previously, Brenna co-founded a network of K-8 charter schools in Washington D.C. She also served as the CFO at KIPP DC while that charter network grew from one to five schools. Brenna has a certificate from Relay Graduate School of Education in Principal Supervision, an MBA from Duke University, and a BA from Rice University.

**Adam Aberman** is the CEO and founder of The Learning Collective (TLC). Adam has profound content expertise in technology-based innovation and a 20-year track record educating young people in numerous venues, from traditional public schools to school district administration trainings. Over the past 15 years, Adam has assessed more than 200 current – and 100 proposed – charter schools nationally (California, Colorado, Illinois, Indiana, Michigan, Minnesota, Nevada, New Jersey, New York, and Washington), including being the lead writer for charter renewal inspection visits, charged with evaluating schools and writing the reports that are submitted to authorizers. During every school visit, Adam evaluates the effectiveness of charter schools on a wide range of issues. The range of issues includes schools' use of assessment data, curricular development and alignment with the Common Core, instructional leadership and staff evaluations, classroom instruction, professional development, board governance, parental involvement, and school finances. Adam has also worked with the NACSA and other organizations on evaluation and strategic planning projects regarding Florida, Minnesota, New York, and Ohio authorizers. Other TLC clients have included Alliance College-Ready Public Schools, Chicago Public Schools, College Board, Inglewood Unified School District, KIPP, Tiger Woods Foundation, and UCLA. Adam received an MPP, with an emphasis in Education, from Harvard University's Kennedy School of Government, and a BA from Vassar College.

## SOURCES

Idaho Charter School Law  
Budget Documents  
Organizational Charts  
Annual Report

Application Packet and Criteria  
Applicant Materials and Sample Applications  
Capacity Interview Materials  
Pre-opening Materials

Charter School Contract and Sample Contracts  
Monitoring Guidance  
Charter School Performance Framework  
Site Visit Protocol and Reports

Renewal Contracts and Applications  
Renewal Reports  
Expansion Amendment Requests  
Closure Notices and Protocol  
Renewal Process Guidance for Schools  
Sample Closure Plan

Interviews with Staff, Board Members, and School Leaders  
School Leader Survey