

CHARTER SCHOOL
CONTRACTS AND FINANCES

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CONTRACT DEVELOPMENT PROCESS

CONDUCT NEEDS ASSESSMENT

- Why a charter school and not a program?
- Will the proposed school meet the federal definition of a school?
- Will the proposed school meet the federal definition of autonomy?
- Is there a market for this school?
- Is political support possible?
- What are the obstacles to achieving a charter?
- What benefits will be gained? At what cost?

DECIDE WHETHER TO ESTABLISH A CHARTER SCHOOL, ALTERNATE or MAGNET SCHOOL, OR PROGRAM

<u>Type</u>	<u>Benefits</u>	<u>Cost</u>
Charter School	Autonomy Freedom from Regulations Certification flexibility Funding availability	Limits district control Raises Complicated personnel/union issues
Alternative School	Some autonomy but district maintains most control Alternate school license allows some staffing flexibility	Not autonomous Less funding available Less parent/community ownership Potential fiscal impacts
Magnet/Program	District maintains total control	Potential fiscal impact limited Less parent/community ownership

DEVELOP A CONTRACT FOR THE CHARTER SCHOOL

- Determine if the charter school will be board initiated or established by petition (Follow state laws for the specific type of charter.)
- Develop a committee to craft the contract
- Include authorizer and sponsoring/supporting entities from the outset
- Cover the 15 Wisconsin state law requirements
- Consider the type of governance (for example a 501c3 non-profit corporation)
- Establish admission criteria and policies at the same time you develop the contract
- Have an attorney for both the charter school and authorizer review the contract
- Sell the stakeholders
- Present the contract to the authorizer
- Establish processes for contract revisions and re-authorization

Start to collect data immediately for school improvement and re-authorization. Include:

- | | |
|-----------|----------------------|
| Age | Satisfaction Surveys |
| Grade | Graduation Data |
| Ethnicity | Attendance Data |

Gender	Truancy Data
Retentions	Rate of student return
Suspensions Data	Special Education (SPED) Data
Expulsions Data	Academic Improvement Data
State Test Scores	Other Test Scores

Establish a marketing plan
Periodically review and revise the contract

CONTRACT COMPONENTS

PERSON(S) WHO ESTABLISHED THE SCHOOL

Charter School Governing Board (non-profit corporation)
Authorizer
Instrumentality or non-instrumentality
Other if Milwaukee

TITLE OF PERSON IN CHARGE

Administrator name and/or title
Qualifications
Amount of authority
Determine decision-making model
 Shared decision-making model
 Sole decision-making model
 Teacher Cooperative model

DESCRIPTION OF EDUCATIONAL PROGRAM

Mission
Goals
Population served
Curriculum/Educational plan or model
Behavioral plan/model
Academic, behavioral, employability skills and competency level
Transition plan (Required for SPED)
Community Service
Work experience/apprenticeship
Means of meeting WI goals and standards
Student assessment
 Teacher designed
 Authentic assessments
 Portfolios
 Standardized tests
 Competency/achievement
 Seat time/Carnegie units
 Wisconsin Knowledge and Concept Exam (WKCE)
Special Education services, plan, assessment, etc.

Process for transition back to school of residence if student ages out or chooses to leave
Type and amount of credits awarded (1/4, 1/2, specific courses only)
Award of credits, diplomas (By Whom?, How?, When?)
Accreditation
Acceptance of credit by school of residence
School calendar
 Same as district or different
 Number of days
 Hours of instruction (amount, time of day)

METHOD USED TO ENABLE STUDENTS TO ATTAIN THE EDUCATIONAL GOALS

Description of curriculum and delivery methods
Explanation of unique aspects of the curriculum
Research that supports the chosen curriculum

METHODS TO MEASURE PROGRESS ON EDUCATIONAL GOAL ATTAINMENT

Alignment of curriculum to state standards
Detailed description of methods used to measure student achievement related to the curricula and state standards
Measureable academic goals and objectives and standards marking success

GOVERNANCE STRUCTURE

Members and makeup of Governance Board -amount and type of staff, student, parent, community, and authorizer representatives
Appointment process
 By whom? When?
 Vacancy process
 Term length
 Term limits
 Voting/ex-officio membership
 Rotation process
Chain of command
Organizational meeting process
 Both initial and yearly
 Date
 Process/agenda
Governance Board Duties
 Set policy (Not administrator/manager)
 Approve and sign contracts
 Approve budget and expenditures
 Evaluate administrator
 Approve evaluation process for the school
 Follow open meeting laws
 Connect to other boards and agencies
 Insure liability, errors and omissions insurance coverage by Authorizer or Charter

EVALUATION

Internal vs. external

On-going or at specific intervals

Qualitative

Student, parent, staff satisfaction surveys

Board survey

Community/authorizer survey

Anecdotal data

Focus groups

Interviews

Quantitative

WKCE (state tests)

Standardized tests

Pre/post tests

Grades, discipline referrals, suspensions, attendance, gender, ethnicity, SPED data, retention and number of students returning to the school each year

Spread sheets indicating/tracking financial health of the organization

“Dashboard” of key indicators of success and progress to date

Formal assessment of progress on strategic plan and specific action plans

EMPLOYEE QUALIFICATIONS

District or not district employee

Union or non-union

Memorandum of Understanding (MOU) between the charter school, authorizer and each union (seniority, lanes, bumping, reduction in force)

Separate union category or with other similar district employees (bumping rights, seniority)

Licensing and/or certification requirements

Hiring process - Who selects? How? Who approves?

Staff development requirements and processes

HEALTH AND SAFETY

Inspections

Responsible party

Schedules

Process and time frame for correcting hazards

ETHNIC AND RACIAL BALANCE

Reflective of district population

Non-discrimination policy and process

ADMISSION/DISMISSAL PROCESS

Process to establish and amend policy

Waiting list/lottery policies and process

Admission criteria and process

Dismissal criteria and process

Staff/student ratios

Maximum and minimum enrollment

Process and timing for adding additional students
Appeal process
Statement of voluntary nature of charter schools
(Attendance cannot be required)
Expulsion process - Who? How? Why?

AUDITS AND FINANCIAL OPERATION

Establish fiscal year, fiscal agent, and that the governance board has authority to make fiscal decisions

Audits - By whom? Reported to whom? When?

FUNDING/BUDGET

Actual cost (income and expenditures)
Cost comparison to district cost per child (**including “opt-outs” and “buy- ins”**)
Foundations
Contributions

DISCIPLINE PROCEDURES

Who establishes - staff, governing board?
What does it look like?
Suspension and expulsion process
Truancy policy/process

ALTERNATIVES FOR STUDENTS WHO DO NOT WANT TO ATTEND THE CHARTER SCHOOL

Describe options

FACILITY, LIABILITY LIMITS AND EFFECT OF THE SCHOOL ON THE DISTRICT'S LIABILITY

Site
Rent/In-kind contribution/own
Heat Repairs
Electric Routine maintenance
Sewer/water Lawn care
Cleaning Snow plowing
Authorizer provided or own insurance/ amount and type of coverage
Effect of liability on authorizer

COMPLIANCE WITH FEDERAL LAW INCLUDING SPECIAL EDUCATION

Who provides SPED? (Charter or purchased from the authorizer or another provider)
Required non-discrimination statement

CO-CURRICULAR PARTICIPATION IN ACTIVITIES OF SCHOOL DISTRICT OF RESIDENCE

Check state athletic association rules on eligibility and other related matters

ENROLLMENT OF NON-RESIDENTS

Under what conditions
Check state open enrollment laws and regulations

FOOD PROGRAM

Who provides?
How funded?

TRANSPORTATION

Who provides?
How funded?

REAUTHORIZATION

Establish the process
Establish the time frame
Establish criteria that must be met for reauthorization (Include your academic measures)

TERMINATION LANGUAGE

Dates contract is in effect (from/to)
Renegotiation process
Reasons for termination (state required and local additions)
Dates termination notice must be given prior to the next year of the contract

CONTRACT BUDGET AND FINANCE ISSUES

BUDGET DEVELOPMENT

Consider best/worse case
Develop actual costs and cost comparison to district cost per seat for public relations and re-authorization purposes
Develop marketing and fund acquisition plans
Monitor expenditures

Establish carry over process
Establish petty cash fund, bank accounts, credit cards
Determine positive and negative impact on district budget
Establish a plan to fund repair, replacement and expansion items

EXPENDITURES

General supplies
Food -Breakfast/Lunch
Staff Development
Staff travel
Pupil travel
Library books and periodicals
Media - equipment, software, supplies

Salaries
Benefits (minimum-maximum, social security, workmen's comp.) Administrator, teachers, aides, secretary, student services, custodian, drivers, etc.

Equipment maintenance contracts
Rent - custodial services, heat/lights, sewer/water, taxes, lawn care, snow plowing – basic maintenance, etc.

Telephone/Fax - Internet access
Transportation
Testing costs
SPED – approves and provides assessment, services, transportation

REVENUES

State aid and tax levy
66.30 Agreements
Title funding
SPED reimbursements
AOTDA (entitlements and grants)
Transportation aide
Technology funds
Grant funds (state, federal, corporate, foundations)
Donations
Consulting fees
Carry over funds at end of fiscal year
Lunch monies
Student fees
Monies from vending machines

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