

# Charter Schools Annual Report Instruction Guide

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Georgia Department of Education

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***"Making Education Work for All Georgians"***

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## Introduction

At the end of each school year, all charter schools are required to submit an annual report to the Georgia Department of Education per O.C.G.A. §20-2-2067.1(c). Each charter school's annual report requirement will be satisfied by completing the Charter School Division's Annual Report Survey. This year the annual report survey will be available beginning Monday, August 15, 2011 and close Friday, September 30, 2011 to meet the October 1 deadline specified in O.C.G.A. §20-2-2067.1(c).

In addition to meeting the code requirements, the annual report survey provides several other opportunities for charter schools to highlight their accomplishments. The second section of the survey is a free response section for schools to provide details, examples and success stories which may not otherwise be captured through the survey. The student achievement section provides space to document additional progress through four additional goals possibly not included in the charter contracts, but nevertheless, important to the school's mission.

This year, additional data collected from the survey will allow the Department to benchmark Georgia's charter schools with public schools nationally. New questions included in the annual report survey will allow for comparisons with data from the National Center for Education Statistic's (NCES) Schools and Staffing Survey (SASS) as well as from other states' charter school surveys. Also captured for the first time will be longitudinal data on student re-enrollment in charter schools.

The annual report survey is a key piece of accountability for each charter school, charter system, local district authorizer and the state. This annual data collection process is crucial to demonstrate how Georgia's charter schools are using their flexibility to broaden quality public school choice options. The accuracy of the responses to the annual survey is crucial as the data will form the backbone of the Department's presentation to the Governor, the General Assembly and the public on the state of chartering in Georgia.

Thank you for your timeliness and commitment to accuracy in completing the annual report survey.

## Survey Tips

### Useful Documents

#### **Legal Documents/Governance Information**

- Charter Contract (accessible via [http://public.doe.k12.ga.us/pea\\_charter.aspx?PageReq=CIIAPCharterSchools](http://public.doe.k12.ga.us/pea_charter.aspx?PageReq=CIIAPCharterSchools))
- Name of Board Chair
- Board meeting minutes
- Proof of non-profit status (accessible via <http://corp.sos.state.ga.us/corp/soskb/csearch.asp>)

#### **Financial Documents**

- Statement of Net Assets
- Contract agreements with service providers
- Lease agreement
- Contact info for CFO and Auditor
- Unaudited Financial Statements

#### **Academic Data**

- Student Scores/Performance Data
- AYP Status (accessible via <http://www.gadoe.org/ayp2011.aspx>)
- Progress toward your academic goals
- Unique accomplishments in the 2010-2011 school year

#### **Personnel Information**

- Personnel numbers for 2010-2011 school year
- Personnel numbers for 2011-2012 school year
- Staff attrition information
- Teacher-student ratios

#### **Demographic**

- Enrollment numbers for 2010-2011 school year
- Enrollment numbers for 2011-2012 school year
- Lottery data and enrollment process
- Free/Reduced Lunch data
- Class size information

#### **General School Information**

- District and School codes (accessible via <https://portal.doe.k12.ga.us/login.aspx>)
- Ownership or leasing status and future plans
- Summary of your curriculum

### **Additional Suggestions**

- 1) Print out a hard copy of the survey and fill it out by hand first. Then, when you are ready to enter the responses online, you will be able to enter the responses in one sitting. This is *crucial* because Zoomerang will not allow you to save your progress and finish the survey at a later time.
- 2) Answer all mandatory questions. Mandatory questions are marked by a \* and the survey will not let you move on to the next page unless all mandatory questions are answered completely. For example, if you select “other,” in the space provided you will have to fill in your explanation for “other” or the survey will indicate that you haven’t answered the question.
- 3) Read all the instructions before answering each question. If you are stuck on a particular question, refer to the additional detailed “Question by Question” Instructions, the recorded webinar and the webinar PowerPoint slides, all of which can be located via [http://public.doe.k12.ga.us/pea\\_charter.aspx?PageReq=PEACSWebinarSeries](http://public.doe.k12.ga.us/pea_charter.aspx?PageReq=PEACSWebinarSeries).
- 4) Read all the answer choices before selecting your response. Please make sure to read the instructions. Some questions allow multiple answer selections, some require you to fill in the blanks, and others require you to select only the best option.
- 5) Pay attention to the dates in question. Most of the questions refer to the 2010-11 school year. Generally, questions for the upcoming 2011-12 school year will follow the initial questions for the 2010-11 school year.
- 6) Avoid using abbreviations, short-hand or acronyms. Although you may be familiar with the abbreviations or acronyms, please fill out your responses as though the reader is not.
- 7) Allot adequate time to complete the survey. We estimate with all directions read and documents already gathered, it should take about one hour to complete the survey. However, Please remember you cannot save your responses to the survey online and come back to complete the online survey later from where you left off. The survey will not save your progress.

### **Common Errors**

- Selecting “other” as a choice in a multiple choice option and then not providing an explanation in the space given
- Skipping a mandatory question or not completely answering a mandatory question
- Leaving a choice blank rather than placing a 0 or N/A

## Accessing the survey

To access the survey, you will need to refer to the August 15, 2011 email from Louis Erste, Director of the Charter Schools Division at GaDOE. Please copy and paste the link referenced in the August 15<sup>th</sup> email into your web browser. Please make sure you have ample time to answer the survey, and that you have already written your responses down. You will not be able to start the survey and then stop and complete at a later time. The survey must be completed in one sitting. Unfortunately, the option to save your answers and continue the survey at another time is not available.

# 2010 - 2011 Charter Schools Annual Report

Dear Respondent,

Thank you for your participation in the 2010 - 2011 Charter Schools Annual Report. The accuracy of your responses is crucial for gathering meaningful and useful data. Please allow yourself around one hour to complete the survey.

For individual question assistance, please refer to the Instruction Guide, the Question by Question Resource and the webinar training materials. For all other remaining questions, please email Sarah Oliver at [soliver@doe.k12.ga.us](mailto:soliver@doe.k12.ga.us).

**Deadline for Submission: 5:00PM Friday, September 30, 2011**

Start Survey!

## Appendix - Key Terms and Definitions

### **Administration Expenses –**

**Administrator** – any school-level personnel who has authority for operating or managing school affairs such as principals, assistant principals, and school managers

**Administrator Attrition Rate** – percentage that represents the number of administrators who left for any reason during the year in relation to the total number of administrator positions employed for the year; for eg: if you have 2 administrator positions and one left, the attrition rate for your administrators is  $\frac{1}{2} = .5 * 100 = 50\%$

**Annual Report** – Yearly submission required by GaDOE of all charter schools satisfied by completing the annual report survey and submitting by the October 1 deadline annually

**Audit** - examine the school's financial statements and issue an opinion on their accuracy.

**Audit Fee** – amount spent for auditing costs

**AYP** – Adequate Yearly Progress, designates whether your school's student achievement is in compliance with No Child Left Behind

**Balance Sheets/Statement of Net Assets** - A financial statement which includes what is owned, what is owed and what it is worth. A Balance Sheet demonstrates a financial position at a single point in time.

**Campus** – Another physical location where students of the charter school are taught

**Career Academy** – a public school designed to help create more effective paths between high school and postsecondary education and the workplace through offering career and technical instruction at the high school level and usually partners with technical institutions and local employers

**Chair** – the chairman of your charter school's governing board.

**Charter** – a performance based contract between the charter authorizer and a charter petitioner. By entering into a charter, a charter petitioner and the charter authorizer(s) shall be deemed to have agreed to be bound to all the provisions of the Charter Schools Act and SBOE Rule 160-4-9-.04 as if such terms were set forth in the charter.

**CMO** – Not-for profit Charter Management Organization, that can enter into a contract with a charter school for delivery of service, curricula, etc

**Charter authorizer** – a local school board and, the Georgia State Board of Education.

**Charter school** – a public school that is operating under the terms of a charter

**Chief Financial Officer (CFO)** - This is the senior manager responsible for overseeing the financial activities of a school. This includes signing checks, monitoring cash flow, and financial planning.

**Conversion charter school** – a charter school that existed as a local school prior to becoming a charter school.

**District Code** - Three digit code given by the facilities department of the Georgia Department of Education to signify what school district your charter is in.

**District-wide Attendance Zone** – An attendance zone that includes every attendance zone within an school district.

**Dual Language** - a school that teaches academic content through the medium of English and one other language so that a portion of the instructional day is in English and the other portion of the day in the 2<sup>nd</sup> language; and in which classes are deliberately made up of an equal mix of native English speakers and native speakers of the 2<sup>nd</sup> language.

**EMO** – For-profit Educational Management Organization which can enter into a contract with a charter school for delivery of service, curricula, etc

**Facilities Expenses** – Rent, maintenance and repairs, upkeep of the building, modifications that had to be made to the building to meet state or federal standards, utilities expenses

**Fiscal agent** – the entity responsible for the financial control and management of the charter school or schools. For state chartered special schools, the school will act as its own fiscal agent.

**Fiscal Year** – July 1 – June 30; funds are budgeted based on this calendar; the fiscal year is always the year that June 30 falls on; eg: July 1 2010 – June 30 = Fiscal Year 2011

**FTE** full-time equivalent; 1/6 segment of the school day for each student; for FTE count calculations see § 20-2-160(b)

**Goal** – As stated in your charter, a statement usually related to improving student performance. SMART goals are specific, measurable, attainable, rigorous, and timely.

**Governing Board** – a school-level group of parents, teachers, administrators, and others who are involved in school-level governance and are the party which enters into the charter contract with the state or local board

**Income Statement/Operating Statement** – a financial statement which shows how a fund's equity has changed during the year; similar to a Profit and Loss Statement prepared in the private sector. It is dated for a period of time.

**Instructional Hours/Day** – number of hours students spend in instruction in a given school day; can be by grade level or school-wide; example 8 hours/day

**Instructional Days** – full school days where students are actively learning

**Instruction Expenses** – expenses associated with the instructional program implemented by the school. Eg: Books, smart boards, computers, etc.

**Joint Enrollment** - an arrangement between a local board or governing board of education and a regionally accredited postsecondary institution wherein a student attends classes away from a high school and earns Carnegie units of credit (for postsecondary credit) that count toward high school graduation as well

**LEA**- Local Education Authority, typically a school district, but also an individual school in the case of a state chartered special school

**LEA start-up charter school** – a charter school that did not exist as a local school prior to becoming a charter school and which was created by a local board as part of the existing local school system. The charter petitioner is the local board.

**Liabilities** – all expenses incurred in operating the charter school

**Local charter school** – a start-up charter school, an LEA start-up charter school, a high school cluster, a jointly authorized charter school, or a conversion charter school that is operating under the terms of a charter between the charter petitioner, the local board, and the SBOE.

**Management Fee** – an agreed upon amount between the charter school and an education or charter management organization for services provided to the charter school; charter schools who partner with a CMO or EMO must report in the annual report survey how much the EMO or CMO earned in management fees from the charter school

**Maximum or Broad Flexibility** – waiver from adherence to the requirements of Title 20 of the Georgia Code with exceptions for health, life and safety issues, federal requirements and reporting requirements

**National School Breakfast and Lunch Program** - federally assisted meal program that provides nutritionally balanced, low-cost or free breakfast and lunch for qualifying students; includes reimbursement for snacks served to children in afterschool educational and enrichment programs.

<http://www.fns.usda.gov/cnd/lunch/>

**Operating Expenses** – expenses incurred as a result of the normal operations of a school.

**Private Fundraising** – the process of obtaining funding from other sources besides the Federal, State or Local Governments.

**QBE** – quality basic education, a term used to describe the state formula for calculating basic state funding. The term is also used to label the basic state funding earned by students in Georgia schools.



**Respondent** – An administrator-level person authorized to fill out the annual report survey such as the superintendent, school manager or director, principal or governing board member.

**Reserve Fund** – a reserve of cash set aside to cover possible unforeseen future expenses.

**Revenue** – an increase in cash, net current assets, or total equity

**SBOE**-Georgia State Board of Education

**School Code** – Four digit code issued by the facilities department of the Georgia Department of Education and is a requirement to receive funding

**Staff Days** – Paid full work days for staff (teacher, administrators and others) when no students are present and where staff can dedicate their time to professional development, curriculum development, assessing and developing individualized plans for students, etc

**Start-up charter school** – a charter school that did not exist as a local school prior to becoming a charter school. The petitioner is not the local board.

**State chartered special school** – a charter school created as a special school that is operating under the terms of a charter between the charter petitioner and the SBOE and which acts as its own public Local Education Agency for accountability purposes.

**Statement of Cash Flows** – a financial statement that shows the amount of cash generated and used by a school in a given period. Cash flow can be attributed to a specific project or to a school as a whole.

**Statement of Revenues, Expenditures and Changes in Fund Balance** – a financial statement which shows how a fund's equity has changed during the year; similar to a Profit and Loss Statement prepared in the private sector. It is dated for a period of time.

**Student Attrition Rate** – a percentage that describes how many students left the school during the school year; for eg: 350 students enrolled in 2010-11 in your charter school, but 40 students left for various reasons during the school year, your student attrition rate =  $40/350 * 100 = 11.4\%$

**Student Teacher Ratio** – a ratio of the number of students per teacher; usually calculated by grade level; for eg: 21:1 1<sup>st</sup> grade is 21 kindergarteners for each 1 teacher

**Surplus Balance** – A positive remaining balance (ending fund balance) after expenses and the reserve fund amount have been deducted from revenues. Revenue-Expenses-Reserve Fund= Surplus Balance (if positive).

**Target**- The measurable quantity you are trying to attain in your goal. Example of a target: 100% of grade 5 students will score meets or exceeds in reading.

**Teacher** - all personnel assigned to the charter school on a full- time basis and all paraprofessionals assigned to the school on a full-time basis. The term “paraprofessional” shall have the same meaning as set out in O.C.G.A. § 20-2-204.

**Teacher Attrition Rate** – Number of full-time teachers who left the school divided by the total number of full-time teachers employed by the school in a given school year

**Waiver** – charter schools are given permission to omit certain requirements; only the Georgia State Board of Education can issue waivers