

# Charter Petition Workshop

Charter Schools Division  
March 29, 2011

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Dr. John D. Barge, State School Superintendent  
"Making Education Work for All Georgians"  
[www.gadoe.org](http://www.gadoe.org)

# Agenda

Time	Topic/Activity	Petition Section(s) Addressed
9:00 – 9:10	Welcome / Introduction	
9:10 - 9:30	Overview and Why Charter?	Mission, Vision, Educ. Philosophy
9:30 - 10:00	Accountability and SMART Goals	Performance Goals and Objectives
10:00 - 10:20	Governance	Governing Body/Board Composition
10:20 - 10:30	Break	
10:30 - 11:00	Legal Requirements	Multiple
11:00 - 11:45	Financial Operations	Budget, Financial Management, Facility
11:45 - 12:00	Questions	

# Overview

# The Petition

Introduction

A. Educational Plan

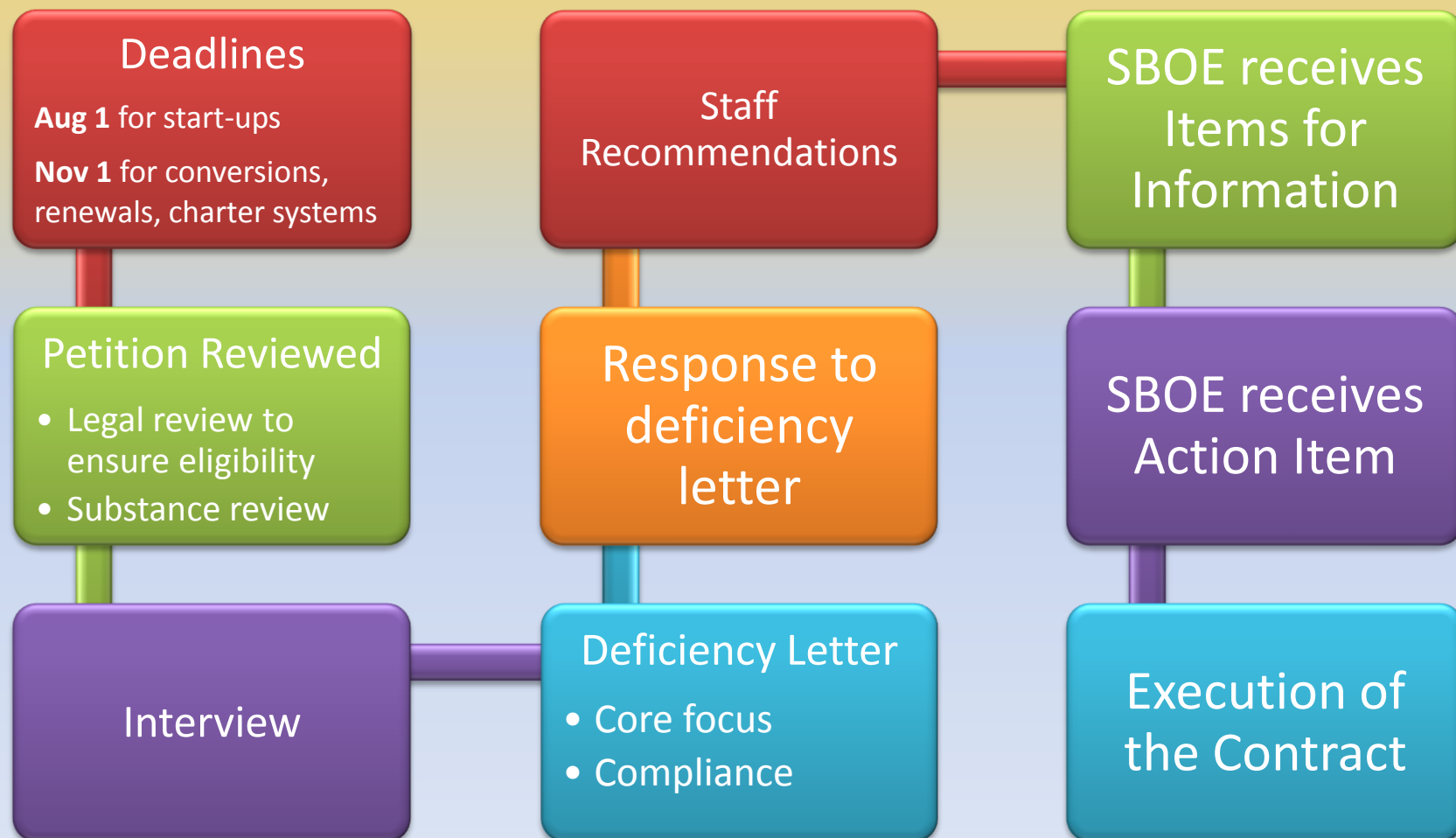
B. Organizational Plan

C. Financial Plan

D. Local Supplement

E. Commission Supplement

# SBOE's Petition Process for Locally Approved Charter Schools



# Georgia Charter Schools Commission's Petition Process



# Elements of a High-Quality Charter School



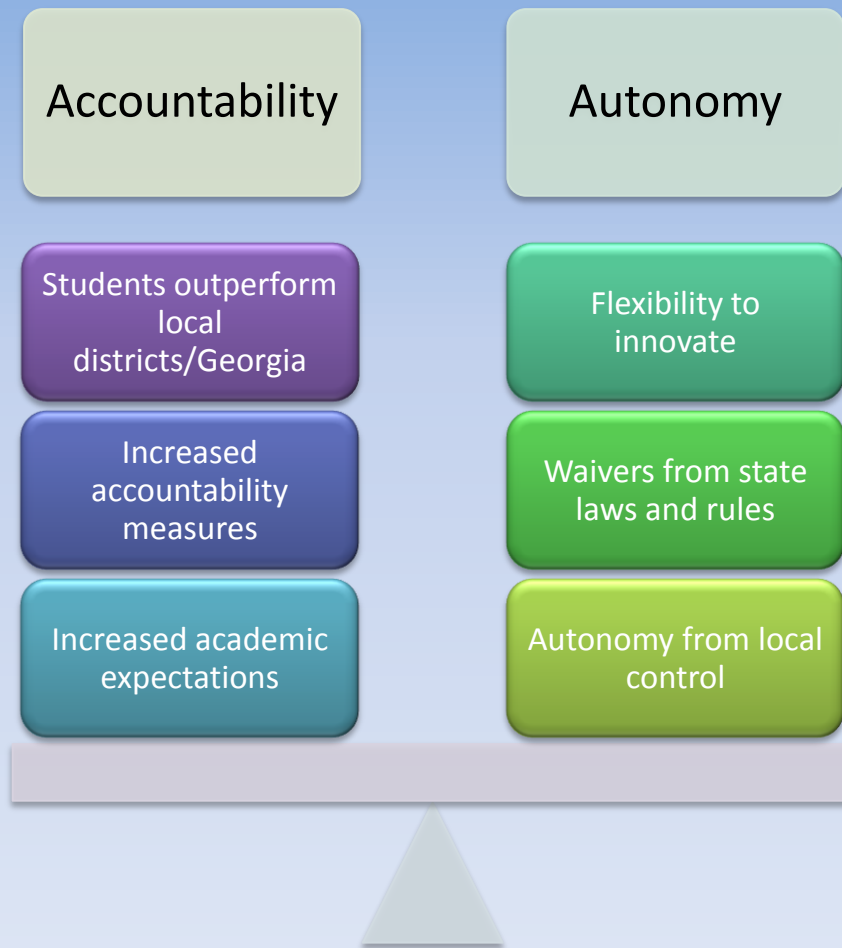
# Why Charter?



Petition Section: Mission, Vision, and Educational  
Philosophy

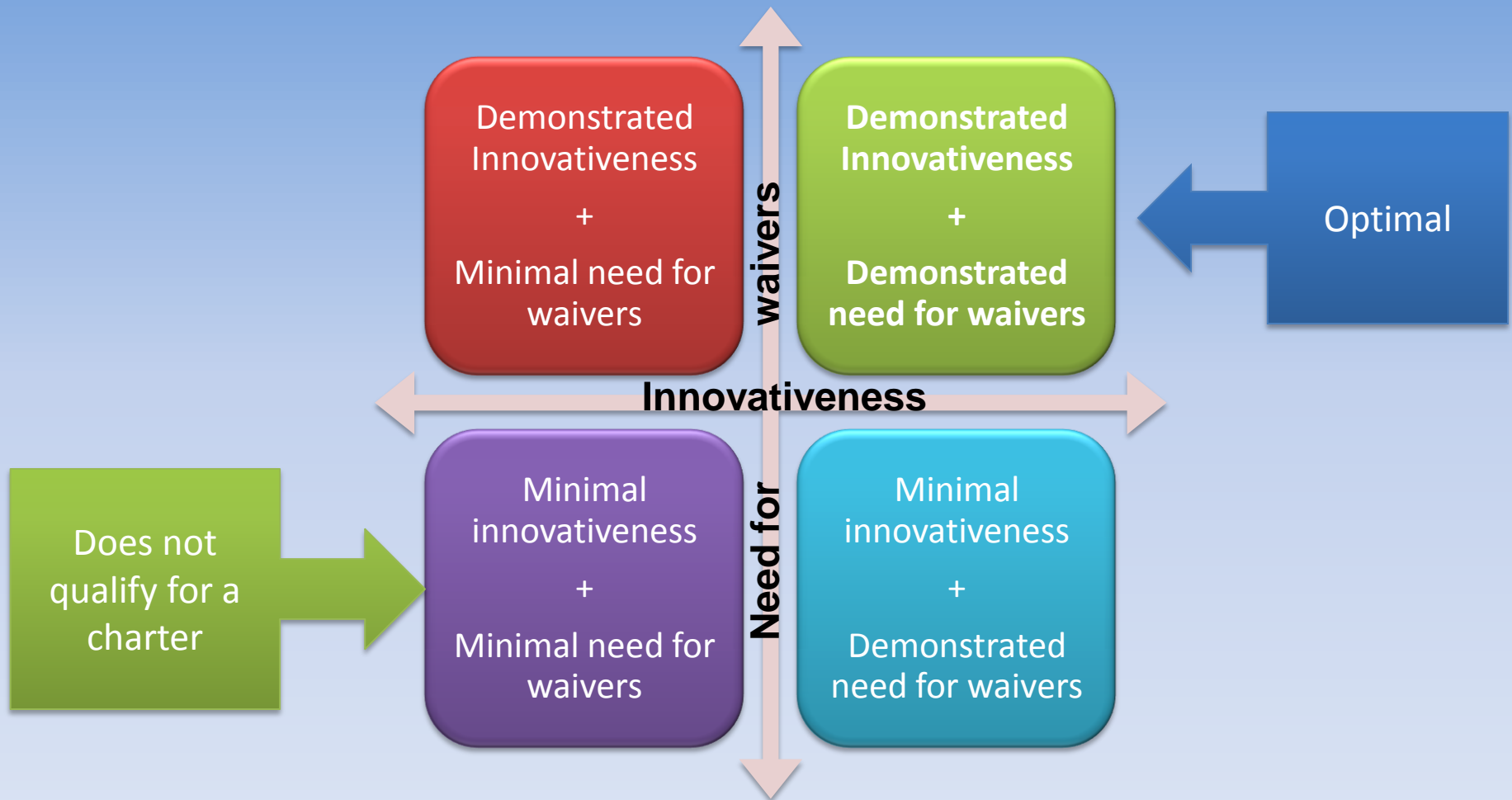


# The Basic Bargain

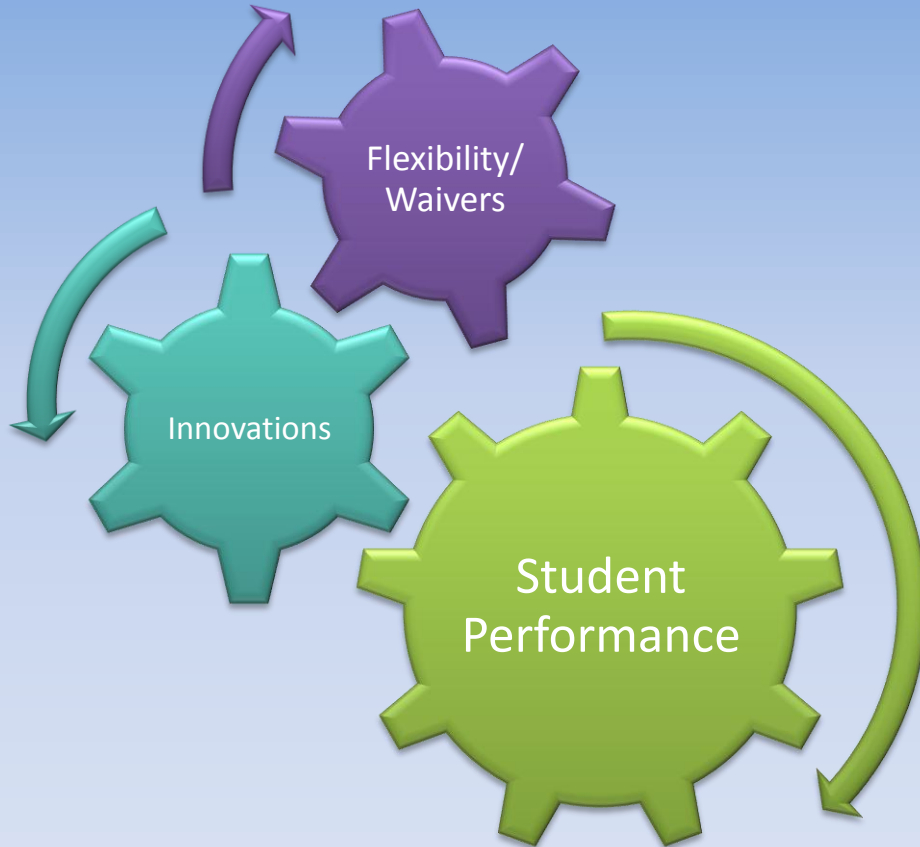


So...how do you demonstrate the need for a charter?

# Flexibility



# Accountability



- You must show the link!
- Example: We request a seat time waiver so that we can extend the school day and provide additional math instruction, thereby raising CRCT Math scores.

# Group Activity: Waivers and Innovations

Discuss and write down ONE way in which your will be educationally or operationally innovative.

Discuss and write down ONE waiver which you will need to request from state law in order to implement this innovation.

Explain how the waiver you seek and your innovation will improve student performance.



# Popular Uses of the Broad Flexibility Waiver

Class size

Teacher  
Certification

Textbook  
Selection

Governance

Seat time

Length of school  
year

## Special Programs

- Early Intervention Program
- Gifted Services



# Writing SMART Goals



Petition Section: Measureable performance goals and objectives

# Performance Goals

Mission and Vision  
Statement



Academic and  
Organizational  
Performance Goals

S

- SPECIFIC

M

- MEASURABLE

A

- AMBITIOUS & ATTAINABLE

R

- REALISTIC/REFLECTIVE OF  
MISSION/RESEARCH-BASED/RIGOROUS

T

- TIME-PHASED/TIME-BOUND



# SMART Goals: Specific

## Specific

- All teachers at Achievement Charter School will complete a 2-week summer workshop in Achievement's educational philosophy, school culture and instructional methodology.

## Not Specific

- Teachers at Achievement Charter School will receive staff development training.

# SMART Goals: Measureable

## Measurable

- On average, students will improve their scores on the Stanford-9 Reading Assessment by 4% each year.

## Not Measureable

- Students will become excellent readers and writers.

# SMART Goals: Ambitious & Attainable

## Attainable

- Achievement Charter School will have an exceeds rate 5% above the state average by year 3.

## Not Attainable

- Achievement Charter School will outperform every school in the local district in all academic areas.

# SMART Goals: Realistic

## Realistic

- 75% percent of students at Achievement Charter School will exceed State averages on Math and Reading on the CRCT.

## Not Realistic

- 100% of students at Achievement Charter School will improve upon their baseline CRCT reading scores by 15% in the first year of operation.

# SMART Goals: Time-Bound

## Time-bound

- Achievement Charter School will close the achievement gap between subgroups by 50% by the end of year 2, and by an additional 10% each year thereafter.

## Not Time-Bound

- Achievement Charter School will close the achievement gap between subgroups by 50%.

# Group Activity: SMART GOALS

Using the template provided, work as a team to write a SMART goal for your school. (5 min)



2 or 3 groups will share your SMART goal with the whole group. **Justify** what makes it SMART. (5 min)



# Governance



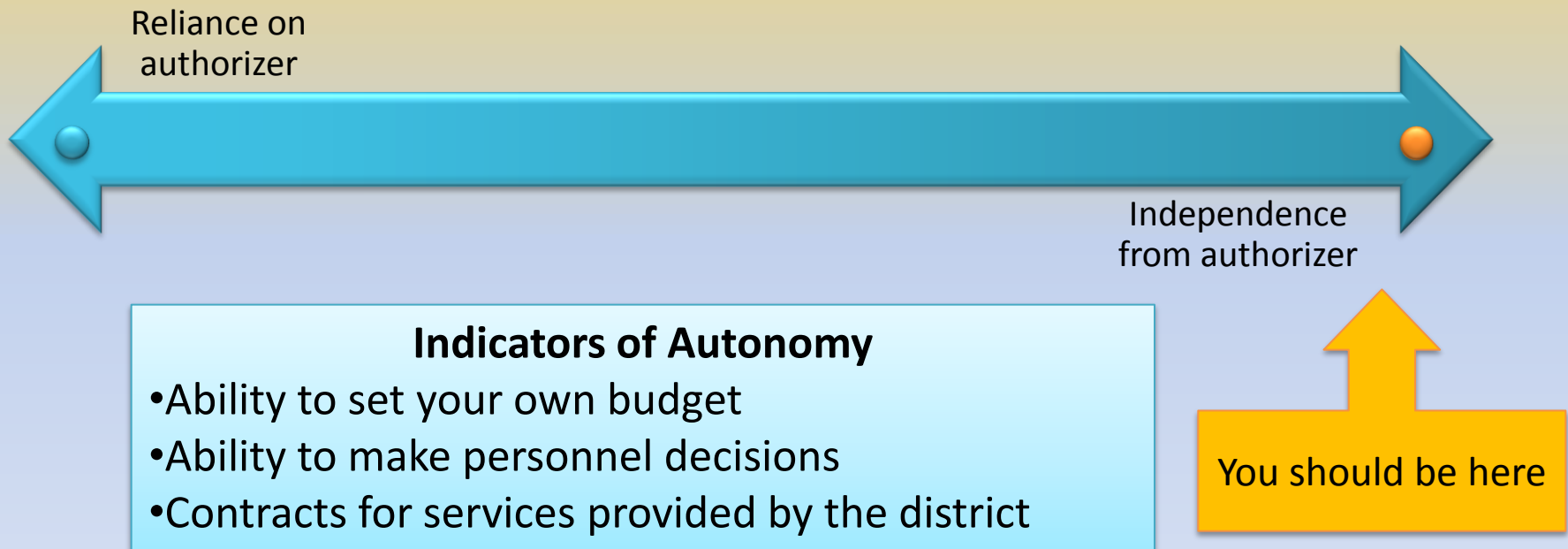
Petition Section: Governing Body, Governing Board  
Composition

# Governing Board





# Continuum of Autonomy



# Governing Board Capacity

## Composition



# Governing Board Capacity

## Development



# Other Considerations

## Size of the board

- Sufficient capacity without becoming unwieldy

## Conflicts of interest

- Avoid!

## Governance vs. Management

- Governance = Governing Board
- Management = School Leader and EMO/CMO



# Legal Requirements



## Petition Sections:

### Special Student Populations

- IDEA/Section 504
- Title III English Language Learners

### SES and Remediation

### School Climate and Discipline

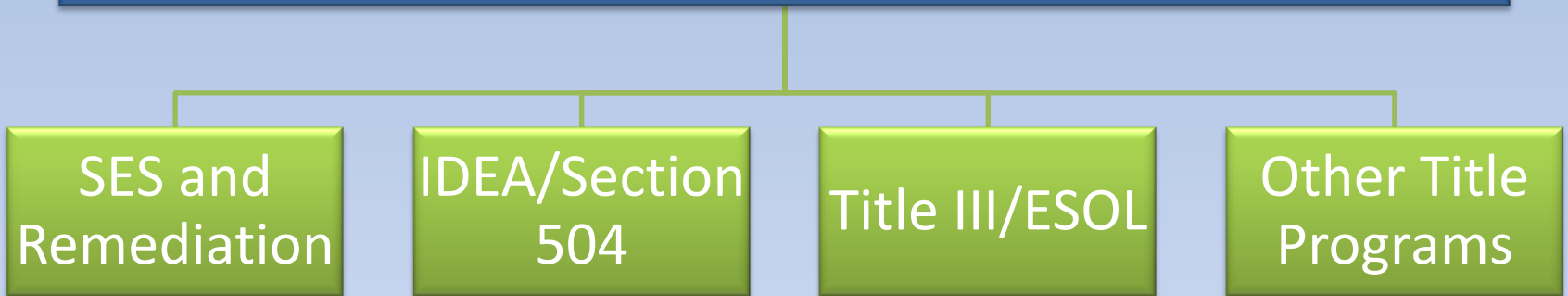
### Student Recruitment and Enrollment

# Federal Definition of a Charter School

1. Exempt from significant State or local rules
2. Created as a public school, publicly supervised and directed
3. Pursues a specific set of educational objectives
4. Elementary, secondary, or both
5. Nonsectarian and not affiliated with sectarian school or religious institution
6. No tuition
7. Complies with Federal mandates
8. School of choice with enrollment lottery if necessary
9. Complies with Federal and State audit requirements
10. Meets all health and safety requirements
11. Operates in accordance with State law
12. Written performance contract with authorizer with student performance measures

# Federal/NCLB Requirements

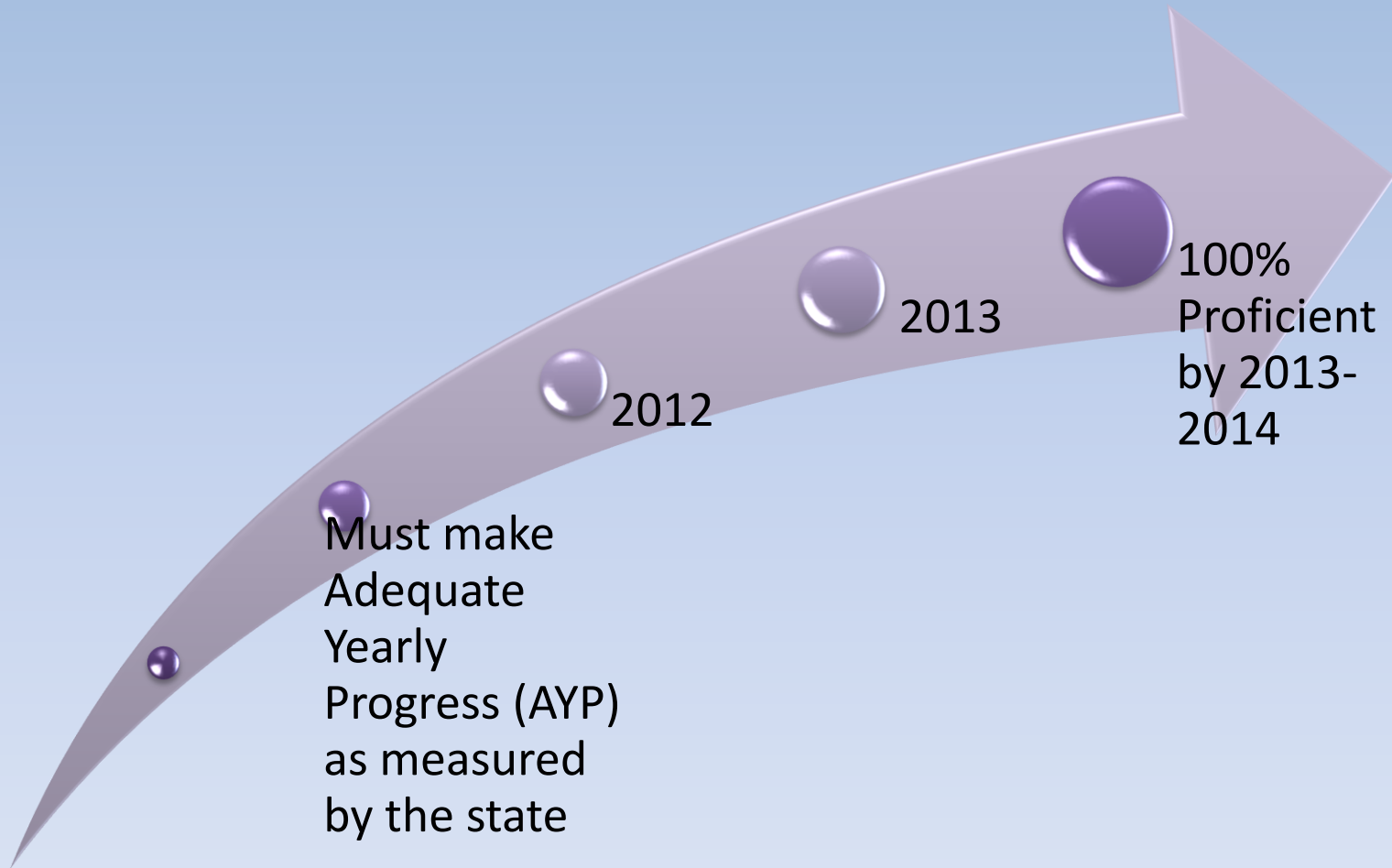
How will you provide the following services?



- Provide sufficient detail
- Demonstrate that you will comply with the law
- If you receive funding, you must provide services



# NCLB Requirements



Petition Section: Academic Goals and Performance Objectives



# Due Process

Explain the school discipline process in detail in the petition

Take at least a full paragraph

Demonstrate that you will comply with Federal due process law



# State Law

The following state requirements cannot be waived

QBE and other funding formulas

Health and Safety requirements



# The Georgia Charter Schools Act

## Non-Profit Requirement

## Attendance Zone/Enrollment Priorities

- O.C.G.A 20-2-2066
- Mirror the language of the statute
- List enrollment priorities in rank order



# Financial Operations



Petition Sections: Budget, Financial Management,  
Facility

# Demo



Walking

through

the

budget

template...

# Sample System Allotment Sheet

**OFFICIAL**

**Georgia State Department Of Education**

Earnings Sheet for FY 2011

1/20/2011

**School System:** 648 - Douglas County

FY2011 Amendment #3(Comm. Charter)

THE BASIC UNIT COST IS DEFINED TO BE THE AMOUNT OF \$2,769.20

---Earnings (\$)-

---Earned Positions:

-----Grades K-12-----

DIRECT INSTRUCTIONAL COST	FTE	SALARY	OPERATING	QBE EARNINGS	LESS LOCAL \$ MILLS	STATE FUNDS	Teacher	Subj. Spec	Couns.	Tech. Spec
Kindergarten Pgm	1,515	8,019,593	95,084	8,114,677	1,300,769	6,813,908	101.00		3.28	1.38
Kindergarten Early Intr Pgm	210	1,437,868	13,180	1,451,048	232,600	1,218,448	19.09		0.45	0.19
Primary Grade(1-3) Pgm	4,829	20,047,587	340,483	20,388,070	3,268,172	17,119,898	284.06	14.00	10.45	4.39
Primary Grd Early Intrv(1-3) Pgm	492	3,055,264	34,703	3,089,967	495,316	2,594,651	44.73	1.43	1.06	0.45
Upper Elementary Grd(4-5) Pgm	2,852	9,034,841	156,928	9,191,769	1,473,425	7,718,344	124.00	8.27	6.17	2.59
UppElem Grd Early Intrv(4-5)	536	3,327,372	29,496	3,356,868	538,100	2,818,768	48.73	1.55	1.16	0.49
Middle Grade(6-8) Pgm	111	348,738	6,127	354,865	56,884	297,981	4.83	0.32	0.18	0.10
Middle School(6-8) Pgm	4,707	16,710,152	259,003	16,969,155	2,720,126	14,249,029	235.35	13.64	7.54	4.28
High School Gen Educ(9-12)	5,471	16,433,564	537,272	16,970,836	2,720,396	14,250,440	237.87		13.68	4.97
Vocational Lab(9-12) Pgm	1,409	4,821,432	440,747	5,262,179	843,518	4,418,661	70.45		3.52	1.28
Students with Disab Cat I	161	1,299,019	37,605	1,336,624	214,259	1,122,365	20.13			0.15
Students with Disab Cat II	107	1,061,118	12,408	1,073,526	172,084	901,442	16.46			0.10
Students with Disab Cat III	753	9,694,623	142,177	9,836,800	1,576,822	8,259,978	150.60			0.68
Students with Disab Cat IV	142	3,041,507	57,799	3,099,306	496,813	2,602,493	47.33			0.13
Students with Disab Cat V	123	989,728	49,929	1,039,657	166,655	873,002	15.38			0.11
Gifted Student Category VI	963	5,198,577	82,347	5,280,924	846,523	4,434,401	80.25			0.88
Remedial Education Pgm	186	804,708	7,814	812,522	130,246	682,276	12.40			0.17
Alternate Education Pgm	294	1,460,868	16,178	1,477,046	236,768	1,240,278	19.60		2.94	0.27
Eng Spkrs of Other Lang.(ESOL)	145	1,335,852	6,097	1,341,949	215,112	1,126,837	20.71			0.13
Spec Ed. Itinearant				0	0	0				
Spec Ed. Supplemental Speech				12,131	1,945	10,186				
<b>TOTAL DIRECT INSTRUC.</b>	<b>25,006</b>	<b>108,122,411</b>	<b>2,325,377</b>	<b>110,459,919</b>	<b>17,706,533</b>	<b>92,753,386</b>	<b>1,552.97</b>	<b>39.21</b>	<b>50.43</b>	<b>22.74</b>

INDIRECT COST																				
Central Admin	2,584,145	384,834	2,968,979	475,922	2,493,057					1.00	6.00				1.00	10.10	10.10	11.25		
School Admin	5,955,068	175,331	6,130,399	982,692	5,147,707							34.00	40.57	49.71						
Facility M & O		7,451,436	7,451,436	1,194,452	6,256,984															
Sub Total (INDIRECT COST)	8,539,213	8,011,601	16,550,814	2,653,066	13,897,748					1.00	6.00	34.00	40.57	50.71	1.00	10.10	10.10	11.25		
MEDIA CENTER PGM.	2,721,035	349,597	3,070,632	492,217	2,578,415														42.61	
20 DAYS ADDITIONAL INSTRUCTION	958,954		958,954	153,719	805,235															
STAFF & PROFESSIONAL DEV			594,915	95,364	499,551															
MIDTERM HOLD HARMLESS																				
Amended Formula Adjustment				(16,328,171)																
Charter System Adjustment																				
QBE FORMULA EARNINGS	120,341,613	10,686,575	131,635,234	21,100,899	94,206,164	1,552.97	39.21	50.43	22.74	1.00	6.00	34.00	40.57	50.71	1.00	10.10	10.10	11.25	42.61	

## NOTES

Expenditure Controls relating to direct instructional costs%2c media center costs%2cstaff%2cprofessional development costs and 20 Days on Additional Instruction have been waived and shall not apply to nor be enforceable against a local system in FY 2011.

CATEGORICAL GRANTS			
Pupil Transportation Pgm (Includes 111 Drivers and bus replacement funds of 0)	1,630,529		1,630,529
Sparsity - Regular	0		0
Sparsity - Alternative Program	0		0
Sub Total (SPARSITY)	0		0
Migrant Education	0		0
TOTAL EARNINGS FOR QUALITY BASIC EDUCATION	133,265,763		95,836,693
Education Equalization Funding Grant	7,500,778		7,500,778
Nursing Services	368,388		368,388
TOTAL STATE FUNDING ON THIS ALLOTMENT SHEET	141,134,929		103,705,859
Charter Commission Admin - State			0
Charter Commission Local Revenue			0
Charter Commission Admin - Local			0
ARRA	1,916,720		1,916,720
TOTAL FUNDING ON THIS ALLOTMENT SHEET	143,051,649		105,622,579

# Sample Charter Site Allotment

**OFFICIAL**

**Georgia State Department Of Education**

### Earnings Sheet for FY 2011

6/24/2010

School System: 761 - Atlanta Public Schools

School: 1208 - Imagine Wesley International

Academy Charter Facility

FY 11 INITIAL SITE

---Earned Positions----->

-----Grades K-12----->

THE BASIC UNIT COST IS DEFINED TO BE THE AMOUNT OF \$2,739.77

DIRECT INSTRUCTIONAL COST	FTE	SALARY	OPERATING	QBE EARNINGS	LESS LOCAL 5 MILLS	STATE FUNDS	Teacher	Subj. Spec	Couns.	Tech. Spec
Kindergarten Pgm	104	486,179	6,527	492,706	229,752	262,954				
Kindergarten Early Intr Pgm	16	96,271	1,004	97,275	45,360	51,915				
Primary Grade(1-3) Pgm	248	889,497	17,486	906,983	422,932	484,051				
Primary Grd Early Intrv(1-3) Pgm	9	48,267	635	48,902	22,803	26,099				
Upper Elementary Grd(4-5) Pgm	83	227,182	4,568	231,750	108,067	123,683				
UppElem Grd Early Intrv(4-5)	11	58,993	605	59,598	27,791	31,807				
Middle Grade(6-8) Pgm	99	267,906	5,448	273,354	127,467	145,887				
Middle School(6-8) Pgm	0	0	0	0	0	0				
High School Gen Educ(9-12)	0	0	0	0	0	0				
Vocational Lab(9-12) Pgm	0	0	0	0	0	0				
Students with Disab Cat I	0	0	0	0	0	0				
Students with Disab Cat II	0	0	0	0	0	0				
Students with Disab Cat III	5	55,614	944	56,558	26,373	30,185				
Students with Disab Cat IV	1	18,504	407	18,911	8,818	10,093				
Students with Disab Cat V	0	0	0	0	0	0				
Gifted Student Category VI	0	0	0	0	0	0				
Remedial Education Pgm	8	29,928	336	30,264	14,112	16,152				
Alternate Education Pgm										
Eng.Spkr.s of Other Lang.(ESOL)	0	0	0	0	0	0				
Spec Ed. Itinearant				0	0	0				
Spec Ed. Supplemental Speech				0	0	0				
TOTAL DIRECT INSTRUC.	584	2,178,341	37,960	2,216,301	1,033,475	1,182,826				
INDIRECT COST										
Central Admin		38,636	8,987	47,623	22,207	25,416				
School Admin		124,254	4,377	128,631	59,982	68,649				
Facility M & O			174,031	174,031	81,152	92,879				
Sub Total (INDIRECT COST)		162,890	187,395	350,285	163,341	186,944				
MEDIA CENTER PGM.		67,740	8,684	76,424	35,637	40,787				
20 DAYS ADDITIONAL INSTRUCTION		21,452		21,452	10,003	11,449				
STAFF & PROFESSIONAL DEV				13,208	6,159	7,049				
MIDTERM HOLD HARMLESS										
Amended Formula Adjustment										
Charter System Adjustment										
QBE FORMULA EARNINGS		2,430,423	234,039	2,677,670	1,248,615	1,429,055				

## NOTES

# Basic Internal Controls

Performance  
Reviews

Information  
Processing  
Controls

Physical  
Controls

Segregation of  
Duties

Authorization  
and Document  
Based Controls



# Common Budget Mistakes

Overestimating  
funding

Underestimating  
expenses

Including  
competitive grants  
as a source of  
revenue

Budget Deficits

Negative ending  
cash amounts

5 Yr Budget  
numbers do not  
match Cash Flow  
Projection numbers

Fuzzy Assumptions

# CFO Requirement

At the time you submit your petition you should have a highly qualified CFO

Name the person OR provide details of job qualification and rigorous hiring process

List how their qualifications match state requirements

# Useful Links

## School System Revenues/Expenditures

- [http://app3.doe.k12.ga.us/ows-bin/owa/fin\\_pack\\_revenue.entry\\_form](http://app3.doe.k12.ga.us/ows-bin/owa/fin_pack_revenue.entry_form)

## QBE Reports

- [http://app3.doe.k12.ga.us/ows-bin/owa/qbe\\_reports.public\\_menu?p\\_fy=2000](http://app3.doe.k12.ga.us/ows-bin/owa/qbe_reports.public_menu?p_fy=2000)

# Facilities

Make reasonable rent or mortgage estimates when a facility hasn't been secured

- Provide documentation to support your estimate

Provide all information requested on the application

- Geographic region
- Facility descriptions
- Permits, Certificate of Occupancy and documents of ownership/lease
- Etc.

# Questions?

Why Charter?

SMART Goals

Governance

Legal  
Requirements

Financial  
Operations

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