## Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic/Activity</th>
<th>Petition Section(s) Addressed</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 – 9:10</td>
<td>Welcome / Introduction</td>
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<tr>
<td>9:30 - 10:00</td>
<td>Accountability and SMART Goals</td>
<td>Performance Goals and Objectives</td>
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<tr>
<td>10:00 - 10:20</td>
<td>Governance</td>
<td>Governing Body/Board Composition</td>
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<td>10:20 - 10:30</td>
<td>Break</td>
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<td>10:30 - 11:00</td>
<td>Legal Requirements</td>
<td>Multiple</td>
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<td>11:00 - 11:45</td>
<td>Financial Operations</td>
<td>Budget, Financial Management, Facility</td>
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<td>11:45 - 12:00</td>
<td>Questions</td>
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</table>
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

Deadlines
- Aug 1 for start-ups
- Nov 1 for conversions, renewals, charter systems

Petition Reviewed
- Legal review to ensure eligibility
- Substance review

Response to deficiency letter
- Core focus
- Compliance

Interview

SBOE receives Items for Information

SBOE receives Action Item

Staff Recommendations

Execution of the Contract
Georgia Charter Schools Commission’s Petition Process

Deadline
August 1

Petition Reviewed
- Legal review to ensure eligibility
- Substance review

Interview

SBOE Receives Items for Information

Commission Receives Items for Action

Staff Recommendations to Commission

Execution of the Contract

SBOE Receives Action Item
Elements of a High-Quality Charter School

- Strong Mission Statement
- Sound Educational Plan
- Reasonable Financial Plan
- Sufficient Autonomy
- Strong Governing Board
- Legal Compliance
- Strong SMART Goals
- Innovation

High Quality Charter School
Why Charter?
The Basic Bargain

Accountability
- Students outperform local districts/Georgia
- Increased accountability measures
- Increased academic expectations

Autonomy
- Flexibility to innovate
- Waivers from state laws and rules
- Autonomy from local control

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

- Demonstrated Innovativeness + Minimal need for waivers

- Demonstrated Innovativeness + Demonstrated need for waivers

- Minimal innovativeness + Minimal need for waivers

- Minimal innovativeness + Demonstrated need for waivers

Does not qualify for a charter
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 school 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.

Dr. John D. Barge, State School Superintendent
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
SPECIFIC
MEASURABLE
AMBITIOUS & ATTAINABLE
REALISTIC/REFLECTIVE OF MISSION/RESEARCH-BASED/RIGOROUS
TIME-PHASED/TIME-BOUND
### SMART Goals: Specific

<table>
<thead>
<tr>
<th>Specific</th>
<th>Not Specific</th>
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<tbody>
<tr>
<td>•All teachers at Achievement Charter School will complete a 2-week summer workshop in Achievement’s educational philosophy, school culture and instructional methodology.</td>
<td></td>
</tr>
<tr>
<td>•Teachers at Achievement Charter School will receive staff development training.</td>
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</table>
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

<table>
<thead>
<tr>
<th>Time-bound</th>
<th>Not Time-Bound</th>
</tr>
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<tbody>
<tr>
<td>• 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.</td>
<td>• Achievement Charter School will close the achievement gap between subgroups by 50%.</td>
</tr>
</tbody>
</table>
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

- Capacity
- Recruitment Plan
- Autonomy
- Training

Strong Governing Board

Dr. John D. Barge, State School Superintendent
Continuum of Autonomy

Reliance on authorizer

Indicators of Autonomy
- Ability to set your own budget
- Ability to make personnel decisions
- Contracts for services provided by the district

Independence from authorizer

You should be here
Governing Board Capacity

Composition

- Experience in Finance
- Representative of the Community
- Experience in Legal Matters
- Business Savvy
Governing Board Capacity

Development

Training
Recruitment
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?

- SES and Remediation
- IDEA/Section 504
- Title III/ESOL
- Other Title Programs

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

Petition Section: Special Student Populations
NCLB Requirements

Must make Adequate Yearly Progress (AYP) as measured by the state

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

Petition Section: Student Recruitment and Enrollment
Financial Operations

Petition Sections: Budget, Financial Management, Facility
Demo

Walking through the budget template...
## Sample System Allotment Sheet

**Georgia State Department Of Education**

### Earnings Sheet for FY 2011

<table>
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<tr>
<th>School System: 648 - Douglas County</th>
<th></th>
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#### FY2011 Amendment #3(Comm. Charter)

**THE BASIC UNIT COST IS DEFINED TO BE THE AMOUNT OF $2,796.20**

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<td>1,300,769</td>
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<td>3,069,967</td>
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<td>1,073,520</td>
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<td>901,716</td>
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<td>Students with Disab Cat III</td>
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<td>142,177</td>
<td>9,836,800</td>
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<td>6,259,978</td>
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<td>67,796</td>
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<td>2,632,493</td>
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<td>Eng Splsh of Other Lang (ESOL)</td>
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<td>TOTAL DIRECT INTRUC.</td>
<td>25,006</td>
<td>108,122,411</td>
<td>2,325,377</td>
<td>110,459,919</td>
<td>17,786,533</td>
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<td>39.21</td>
<td>50.43</td>
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**INDIRECT COST**

- Central Admin: 2,364,145
- School Admin: 5,955,956
- Facility M & O: 471,436
- Sub Total (INDIRECT COST): 8,539,213
- MEDIA CENTER PGM: 2,721,035
- 20 DAYS ADDITIONAL INSTRUCTION: 658,654
- STAFF & PROFESSIONAL DEV: 594,915
- MIDTERM HOLD HARMLESS: 969,654
- Additional Formula Adjustment: (16,328,171)

**GBE FORMULA EARNINGS**

- 120,341,613
- 10,866,575
- 131,635,234
- 21,100,899
- 94,206,164
- 1,552.97
- 39.21
- 50.43
- 22.74
- NOTES: Expenditure Controls relating to direct instructional costs%2c media center costs%2c staff%2c professional 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.

**TOTAL FUNDING ON THIS ALLOTMENT SHEET**

- 143,051,049
- 105,622,579
# Sample Charter Site Allotment

## Georgia State Department Of Education

**Earnings Sheet for FY 2011**

<table>
<thead>
<tr>
<th>School System:</th>
<th>761 - Atlanta Public Schools</th>
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<tbody>
<tr>
<td>School:</td>
<td>1208 - Imagine Wesley International Academy Charter Public School</td>
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### FY 11 INITIAL SITE

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<th>DIRECT INSTRUCTIONAL COST</th>
<th>FTE</th>
<th>SALARY</th>
<th>OPERATING</th>
<th>QBE EARNINGS</th>
<th>LESS LOCAL $ MILLS</th>
<th>STATE FUNDS</th>
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<td>Vocational Lab (9-12) Pgm</td>
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<tr>
<td>Students with Disab Cat I</td>
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<td>Students with Disab Cat II</td>
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### TOTAL DIRECT INSTRUC. |

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<td>37,063</td>
<td>2,216,301</td>
<td>1,033,476</td>
<td>1,152,826</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### INDIRECT COST |

<table>
<thead>
<tr>
<th>Central Admin</th>
<th>38,636</th>
<th>8,887</th>
<th>47,523</th>
<th>22,207</th>
<th>25,416</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Admin</td>
<td>124,254</td>
<td>4,377</td>
<td>128,631</td>
<td>59,982</td>
<td>68,649</td>
</tr>
<tr>
<td>Facility M &amp; O</td>
<td>174,031</td>
<td>174,031</td>
<td>81,152</td>
<td>92,879</td>
<td></td>
</tr>
</tbody>
</table>

### Media Center Pgm |

<table>
<thead>
<tr>
<th>162,686</th>
<th>163,385</th>
<th>350,385</th>
<th>163,341</th>
<th>156,944</th>
</tr>
</thead>
<tbody>
<tr>
<td>87,740</td>
<td>3,838</td>
<td>86,902</td>
<td>35,637</td>
<td>40,787</td>
</tr>
</tbody>
</table>

### 20 Days Additional Instruction |

<table>
<thead>
<tr>
<th>21,452</th>
<th>21,452</th>
<th>10,003</th>
<th>11,449</th>
</tr>
</thead>
<tbody>
<tr>
<td>STAFF &amp; PROFESSIONAL DEVR</td>
<td>13,208</td>
<td>6,159</td>
<td>7,049</td>
</tr>
</tbody>
</table>

### Midterm Hold HARMLESS |

| Amended Formula Adjustment | 0 |

### Charter System Adjustment |

| GBE Formula Earnings | 2,430,423 | 234,033 | 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

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